Habentur multa in sequentibus... id quod in Itinerario Cantii comperies

INCIPIUNT privilegia aecclesie sancti andreae hrofensis concessa a tempore æthilberhti regis. qui fide xpiana ab eato augustino suscepta. eandem ecclesiam construi fecit

REGNANTE in ppetuum dño nro ihu xpo saluatore. mense aprilio. sub die IIII. kł maias. indictione vii. ego æthelberhtus rex filio meo eadbaldo admonitione catholice fidei optabile. Nobis est aptum semp inquirere. qualiter p loca scorum panime remedio uel stabilitate salutis nre aliquid deportione terre nre in subsidiis seruorum dei deuotissima uoluntate debeamus offerre. Ideoq; tibi scē andrea tuęq; eccliae quę est constituta in ciuitate hrofi breti ubi prę ēē uidet

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CATHEDRAL INVENTORIES

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CATHEDRAL INVENTORIES

CATHEDRALS FABRIC COMMISSION FOR ENGLAND

2021

Cover: **Textus Roffensis, Rochester Cathedral**
Opposite: **St Paul's Cathedral**

CONTENTS

Foreword

This new guidance complements the new *Rules (Amendment) 2020* ("the Rules") for cathedral inventories that came into effect on 1 July 2020. It is intended to help cathedrals meet the requirements of the Rules and of the *Care of Cathedrals Measure 2011* ("the Measure").

This guidance replaces the *Directions 2001*, *Advisory Guidelines 2001*, *PGN4 2001* and *PGN5 1996*. Much of it is therefore not new, but it has been revised and consolidated to make it clearer and more user-friendly.

This guidance is not a substitute for the Rules or the Measure. Any discrepancy between the Rules or Measure and this guidance should be brought to the attention of the secretariat of the *Cathedrals Fabric Commission for England* ("the Commission").

Background

Our aim in updating the regulations for cathedral inventories and this associated guidance has been to provide better support for cathedrals in the management of their moveable heritage. At its most basic a cathedral inventory is simply a list of the significant items in a cathedral's ownership or possession, used to keep track of their location and to ensure decision-making at an appropriate level under the Measure. However, the potential of an inventory goes much further than this: used as the hub for information about a cathedral's heritage it can enable a cathedral to develop broader and deeper knowledge of its history, to engage visitors both in person and online, to support missional activities with research, exhibitions and interpretation, and to forge closer links with the wider heritage sector. This guidance is designed to allow every cathedral to use its inventory to best advantage.

Though this project began in the pre-Covid era, it lands at a time of great uncertainty. Even at the best of times, though, the resources available to a cathedral to work on its inventory are limited. The Commission will therefore work with each cathedral to agree a reasonable and pragmatic schedule for the compilation of an inventory, reflecting its individual circumstances and resources. Having a fit-for-purpose inventory is not an 'optional extra'—it is, and has long been, a legal obligation for every cathedral——-but we will work with you to help you not only meet this obligation but also reap the wider benefits that a fully operational inventory can bring.

What has changed in the new Rules?

The biggest change in the new Rules is the stipulation that an inventory must be principally maintained in electronic form, with a paper copy generated at such intervals as the Chapter determines.

A further change enables Chapter to decide which parts of an inventory can be made fully accessible to the public, to enable the use of online catalogues (such as St Paul's Cathedral's *online collections database*).

The final major change is the requirement that conservation works carried out to an object must also be noted in the inventory. Most conservation works are recorded in a post-conservation report, so in practice this means that an object's inventory entry will now need to record where this report is filed.

How to use this guidance

The fundamental aim of this guidance is to enable every cathedral to compile an inventory that meets the basic legal requirements of the Measure and Rules. However, we know that cathedrals are at different stages of development and have varying levels of aspiration for their inventories: the guidance therefore also recommends good practice for those wishing to go further, and those who wish to meet museum or library and archive accreditation standards for their collections.

This guidance is not intended to be read from cover to cover, but rather to be dipped into on specific areas: it therefore involves some repetition.

We wish to express our gratitude to the cathedral staff and Fabric Advisory Committee (FAC) members who commented on this guidance, and to Vicky Harrison of Wildfire for her work on the guidance and templates.

What happens next?

The Commission will agree an achievable timetable with each cathedral for the compilation of its inventory. We will reconvene our inventories subcommittee to support cathedrals in compiling their inventories, consider drafts, and advise FACs on the designation of outstanding items. This work will be a priority for the Commission, and we hope for cathedrals and their FACs, over the coming years. We will keep this guidance under review in light of feedback on its structure and contents.

The Family of Alfred

INTRODUCTION

1a   The legal requirements

1b   How can inventories be useful to cathedrals?

The objects owned by our cathedrals form a collection of nationally and internationally significant and often irreplaceable religious and cultural items acquired over 1500 years. Many of these items are used every day to help people discover and strengthen their Christian faith. To ensure that such objects can continue to be used to support the mission of the Church, it is important for cathedrals to understand their significance, and how to use and care for them appropriately.

The Measure requires cathedrals to compile and maintain an inventory to assist with this understanding. This guidance explains the requirements of the Measure and how cathedrals can meet it. It also outlines the benefits to a cathedral and its mission of completing this task.

The Commission recognises that cathedrals are at different stages of compiling and maintaining their inventories: this document therefore provides guidance on every stage of the process.

We also appreciate the resource implications of this work. Guidance is therefore provided on how cathedrals can meet their legal obligations through basic collections management practices. Highlighted sections marked **GOOD PRACTICE** offer suggestions of how cathedrals can move beyond these basic measures towards practices that will enable the to use and manage their collections more actively; whilst for cathedrals with collections that are accredited, or who wish to move towards accreditation (see Section 1b, below), there are highlighted sections marked **ACCREDITATION**. Accreditation of collections can help to unlock funding and advice from the wider heritage sector. Not all of the requirements for accreditation is included in this guidance: more information can be obtained from the relevant accrediting organisation (see Section 7a, below).

Throughout this document, 'must' means that something is a legal requirement and 'should' means that it is good practice.

Using an inventory to make applications under the Measure

Any object included on a cathedral's inventory is subject to the Measure. More information about permissions processes can be found in the Measure, the Rules, and *A User's Guide to the Care of Cathedral's Measure*.

Opposite: **Winchester Cathedral**

1a   The legal requirements

This section lays out a cathedral's legal duties with respect to its inventory. Each of these legal requirements is explained in more detail in later sections.

The Measure requires every cathedral to have an inventory. Section 28 of the Rules provides further specific requirements that a cathedral must undertake in order to compile and maintain that inventory.

The duty of compiling and maintaining the inventory belongs ultimately to the cathedral Chapter. The inventory must contain all objects that are owned by or in the custody of the Chapter that the FAC deems to be of architectural, archaeological, artistic or historic interest. The FAC must consult with the Commission to identify items of **outstanding** interest.

The inventory must include all items of architectural, archaeological, artistic or historic interest that are:

- owned by the Chapter, both in the cathedral and within its precinct;

- owned by the Chapter but not currently in its custody, e.g. items on loan to other institutions or cared for by other institutions;

- in the custody but not the ownership of the Chapter, e.g. items kept for safekeeping such as parish plate, or items on loan to the cathedral for temporary exhibition; or,

- usually fixed to the fabric but that could be temporarily removed e.g. for conservation, repair or loan: the inventory should when an object is unfixed or refixed.

For objects owned by the Chapter, the inclusion of an object on a cathedral's inventory imposes legal obligations upon the Chapter relating to:

- sale;

- loan;

- disposal of the object; or,

- any works to the object affecting its character or the wider character of the cathedral.

These legal obligations are subject to the oversight of the Commission in the case of objects classed as outstanding, or of FAC for all other objects on the inventory. The inventory should therefore not be used as a general asset register, and everyday objects without special significance should not be included even if they are of monetary value (for example, audio-visual equipment).

Any objects of special interest within the custody (but not the ownership) of Chapter must still be entered onto the inventory. This could be done using a separate schedule of loans, and can help to ensure that these objects' locations can be tracked. Other legal obligations may be governed by a loan agreement between the Chapter and the object owner.

Each cathedral's inventory must be compiled within a period that the Commission, after consultation with the cathedral Chapter and FAC, considers reasonable, given the particular circumstances involved. The Commission can specify different periods for the completion of different parts of the inventory, so a staged approach can be taken to the compilation of the inventory.

An inventory can be composed of several discrete **schedules** concerned with different categories of object, such as plate, vestments, archaeological remains, worked stone, libraries, archival materials, uncatalogued stone, and so on. This can be a particularly useful approach where a part of a cathedral's collection has already been catalogued, provided that the necessary information about each object has been recorded and that it is noted which objects are of outstanding interest, or if an individual object should *not* be considered part of the inventory for the purposes of the Measure.

If a cathedral does not yet have a working inventory, it must treat any object of architectural, archaeological, historic or artistic interest as though it were recorded on the inventory as an item of outstanding importance for the purposes of the Measure. Any proposal for the sale, loan or disposal of, or for work to, such an object where there is no inventory must therefore be made to the Commission, unless the Commission's secretariat advises otherwise.

Treasure

If any item of treasure ('treasure trove') is discovered within the cathedral or its precinct, the cathedral administrator must arrange for it to be recorded as a treasure item on the inventory. 'Treasure' in this context is a legal term meaning any object which would, but for an order under section 2(2) of the Treasure Act 1996 (c.24), be treasure within the meaning of that Act, and which is found in or under the cathedral or within its precinct.

1b   How can inventories be useful to cathedrals?

An inventory is principally a record of the items in the Chapter's care which its FAC has identified as being of architectural, archaeological, artistic or historic interest. It is the primary tool for managing and caring for a cathedral's collections. An inventory helps determine what needs to be looked after and how that can be achieved. Benefits provided through providing sufficient resources to maintain the cathedral inventory include the following:

Supporting good governance

An inventory is essential for recording what the cathedral has in its ownership or custody, and where these objects are located; it can also be used to record information relating to their use, display and conservation requirements. The inventory number is the unique identifier used to link all records relating to an object and, together with the photographic record, is vital for the management of objects in cathedrals.

An inventory enables Chapters to assess the security and insurance needs of objects whilst in the cathedral and whilst on loan; to develop collections policies; to make informed decisions on acquisitions and disposals for the cathedral; and to identify priorities for a disaster management plan. It will also help with salvage and recovery if a disaster occurs.

Helping mission

Many objects in cathedral collections can be used to help people to connect with others on faith journeys, both in the past and the present. They may enable people to question and explore their own views, and those of others. The inventory, as the central repository for information about an object, provides a place to document the stories held within objects, which helps with their interpretation and use. The inventory supports liturgical planning, assisting with the safe use of objects in services and identifying when new liturgical items are needed.

Prioritising resources

As one of the cathedral's main management tools, alongside the conservation management plan and quinquennial inspection reports, the inventory enables a

Chapter to make informed decisions about where to prioritise resources, by understanding where their greatest need is in caring for the items on their inventory. This understanding can assist in identifying funding opportunities for those items that are considered to be at risk.

Identifying stories to unlock funding

Public engagement is an important tool in the sustainability of cathedrals. Inventories help Chapters identify what they have that can be used in exhibitions, loans and learning activities. Funding bodies such as the National Lottery Heritage Fund (NLHF) expect a public engagement element to any application, meaning that a clear understanding of a cathedral's ability to deliver this will lead to a more positive outcome.

Encouraging academic research and learning

The inventory is a useful tool for academic research. This can lead to new information and new stories about the cathedral and its collections, provide new perspectives, support learning and enhance interpretation. Keeping an inventory that is searchable can help researchers learn more about cathedrals across the country, and help to develop a national resource for enhancing and developing new narratives around cathedrals.

Providing a recognised standard in collections care that can unlock funding

Both the Arts Council England (ACE)'s Museum Accreditation scheme and The National Archives (TNA)'s Archive Accreditation scheme promote best practice in collections care. The inventory can form part of achieving these awards. Accredited organisations are able to apply to funding streams closed to unaccredited institutions. This widens the pots of funding available to cathedrals.

Below: **medieval pilgrim tile, Canterbury Cathedral**

WHAT GOES ON AN INVENTORY?

What is the purpose of an inventory?

The inventory is a management tool to identify items of artistic, architectural, archaeological, or historic interest. The inventory records the movement, loss, loan or conservation of such items, and information about their provenance, manufacture, condition and significance.

What does this mean in practice?

An inventory is principally concerned with moveable items: it provides the cathedral Chapter, FAC, and the Commission with a means of keeping track of the location and condition of significant items that, not being fixed to the fabric of the building, might be vulnerable to being mislaid, lost or damaged. Some examples of such items might be books and manuscripts, displaced architectural and archaeological materials, plate, vestments, and portable works of art, but this list is not exhaustive. Recording such items also builds up a fuller picture of the significant items in the ownership or custody of the Chapter, which can help Chapter tell its story and to identify items for loans; this in turn develops strong relationships with external partners, and can help to develop different narratives for fundraising.

A cathedral Chapter may also wish to include elements of the cathedral fabric (such as monuments or stained-glass windows) on their inventory, though it is not required to do so. Recording fixed items of the fabric on the inventory can bring various benefits: for instance, monuments fixed to a wall may be relocated reasonably frequently throughout their lifetime, particularly during building works and re-orderings, and an inventory can provide a record of such movements and the monuments' condition. The recording of such items can also be useful for insurance purposes.

With these points in mind, an item is likely to be suitable for inclusion on the inventory if it is of artistic, architectural, archaeological, or historic merit and one or more of the following criteria apply:

- if the item can be easily moved around or taken out of the cathedral (e.g. books, archives, plate, small sculpture, ornaments, small works of art, displaced archaeological and architectural materials, vestments);

Opposite: **Magna Carta, Salisbury Cathedral**

- if the item could go on loan, be sold, or be easily disposed of (such as larger paintings, tapestries, wall hangings);

- if the item, though currently fixed to the fabric, could be relocated relatively easily (such as a wall-plaque) or if there is a fair chance that it might be relocated in the future, for example as a result of changing liturgical styles (such as a font, pulpit, altar table or cathedra);

- if there is no other asset management tool in which information about the item including its location or works to it can be recorded, such as a conservation management plan;

- if works to it will not be covered by the Measure if it is *not* included on the inventory; or,

- if day-to-day responsibility for the maintenance of the item falls under different cathedral jurisdictions, affecting the care of and works to the item, and where documentation on the item is stored - for example historic doors, stained glass.

The key decision is that if an item is vulnerable to being mislaid, lost or damaged, even if it is usually fixed to the fabric, it must go on the inventory.

A comprehensive inventory can also help to identify gaps and areas of plenty in collections, providing a tool to help Chapter to make informed decisions when approached with donations of items to the cathedral and when considering disposing of items. In this way, the inventory can act as a starting point for the development of a collections development policy for the cathedral, including policies on acquisitions and disposals.

Below: **medieval deed chest, Ely Cathedral**

ASSESSING SIGNIFICANCE

3a   Useful concepts in assessing 'interest'

An object of architectural, archaeological, artistic or historic significance—or, to use the language of the Measure, 'interest'—should be taken to be any object of merit in these fields, or any object which in some way elucidates or extends the current knowledge or understanding of the heritage of a cathedral and its foundation, or which is illustrative of its contribution to history more widely.

Several factors may contribute to the overall significance of an object, and thereby to its architectural, archaeological, artistic or historic interest. When attempting to assess whether an item should be included on the inventory it may be helpful to consider to what degree it possesses one or more of the following types of significance:

Design

The design of an object (in any medium) may be of particular relevance to assessing its artistic and architectural interest. Major works of all periods by leading artists and craftworkers are likely to be of outstanding interest, as are also works of exceptional merit by lesser or unknown craftsmen.

Rarity

In addition to design significance (or even apart from it) an object may have rarity value, which must be taken into account when assessing its historic interest. Rarity value is most likely to attach to items of early date (though not exclusively; and 'early' is in itself a relative term, which will vary according to the medium and type of object). Thus, for example, most medieval figurative sculpture and stained glass that survived the Reformation is likely to have rarity value, and most pre-Victorian textiles and musical instruments are likely to be rare survivals because of their fragility.

Collective value

The object might be part of a collection that has value as a cohesive unit. Furnishings designed by architects of significance, for example, should be added to the inventory where their individual loss or dispersal would have a detrimental effect on the value of the collection as a whole.

Opposite: **Chained Library, Hereford Cathedral**

Local Significance

Considerations of local significance will be of importance in assessing historic interest. An object commissioned specifically for a cathedral is likely to be of more interest than a comparable object bought in or acquired at a date much later than its original manufacture. Significance may also accrue from an object's having been made locally and being representative of local or regional trends.

Associational Significance

Historic interest may also depend on association between an object and an important historical figure or event. Particular significance may derive from a close association with prominent ecclesiastical figures in the history of the cathedral or diocese, or with prominent secular figures in the local community. Association with figures of wider importance in the history of the nation and of the Church should also be taken into account. The concept of associational significance should not be employed too freely: there should always be clear and direct links to the object.

Objects selected for entry in the inventory should not be restricted to particular periods or dates: significance must always be assessed carefully and contextually.

Other frameworks for assessing significance, such as Historic England's Conservation Principles, may also be useful.

3b   Designation of outstanding items

Some items on an inventory are designated as being of **outstanding** architectural, archaeological, artistic or historic interest. This designation is made by the FAC after consultation with the Commission.

The term 'outstanding interest' has a specific meaning within the context of the Measure, and is employed in a relative rather than an absolute sense. The chief practical effect of designating an item as outstanding in the inventory is to ensure that any application for its sale, loan or other disposal, or for works to the item, must be made to the Commission, whereas applications in respect of all other items must be made to the FAC.

Any item in the ownership or custody of Chapter, even for a temporary period, can be designated as being of an item of outstanding interest.

In attempting to define whether or not an item is of outstanding interest, the Commission would suggest that the following criteria and questions be used to determine wither an item should be designated in the inventory as being of outstanding interest:

- any item of key significance for the study of the architecture, archaeology, art, mission or history of the cathedral;

- any item so significantly connected with the history and life of the cathedral or diocese, or of the Church of England more widely, that its sale, loan or other disposal might be a matter of general concern; or,

- any item which by reason of its architectural, archaeological, artistic or historic merit is of national (or international) significance, for example major works by leading artists and craftworkers. If the export of the item were proposed, would it come under the criteria for referral to the Reviewing Committee on the Export of Works of Art (the so-called 'Waverley Criteria')?

Special categories of object

- **Collections of *ex situ* stonework:** these may be very varied, but the following classes of object in particular are potentially of outstanding interest: significant figurative sculpture; ensembles from significant demolished monuments; and key pieces illustrating phases in the history of the building (especially those no longer represented by standing fabric).

- **Archaeological collections:** collections of archaeological materials should not be assessed only on the quality of individual items within a collection but in relation to the significance of the collection as a whole, which may be greater than the sum of its parts.

- **Books and manuscripts:** all manuscripts pre 1701 and all printed books pre 1501 should be designated as outstanding; books and manuscripts of a later date should be assessed on an individual basis using the criteria above. Collections of books and manuscripts, such as cathedral music libraries or books connected with or donated by an individual, family or organisation, can have great collective value including modern volumes.

- **Cathedral archives**, considered collectively, are likely to be considered as of outstanding historic interest to the extent that they together form a valuable and unique historical record. This may include cathedral publications which may have been viewed as ephemera at the time of their publication but which contain valuable information about development works and accounts by the artists and craftsmen involved.

- **Recent objects:** It is extremely difficult to make sound judgements on the importance of recent works, and discretion will be needed in deciding whether to designate objects less than 50 years old as of outstanding interest. Thus, in the case of, for example, textiles, plate or works of art recently commissioned by the administrative body, their perceived artistic merit should not alone be grounds for an outstanding designation.

Consulting the Commission

For the purpose of undertaking the consultation with the Commission on the designation of outstanding items that is required under the Measure, the Commission would request that in each case the following material be provided:

- a draft list of outstanding items with their inventory descriptions;

- the rationale that has been used by the FAC as to why these items should be considered as outstanding. For example, if only the chalice in a set of plate is to be considered outstanding, it should be justified why the paten is not being considered;

- a list of the people who have contributed to its compilation, including an indication of their areas of expertise;

- a list of all locations examined in the course of compiling the inventory; and,

- access to the entire inventory, to establish the context for the selection of outstanding items.

The Commission is always happy to visit a cathedral to discuss its inventory.

COMPILING AN INVENTORY

Compiling an inventory from scratch, or reinvigorating an old inventory, can seem like a daunting project. Before starting it is important to understand the roles and responsibilities of those involved, the legal requirements for the format in which the inventory must be compiled, stored and maintained, and the information that the inventory should capture.

4a   Roles and responsibilities

Chapter

Chapter has a legal responsibility to ensure that an inventory is compiled and maintained. Chapter must authorise any work to the inventory and report on an annual basis to the FAC on the content of the inventory, and progress on its compilation and maintenance. It is also Chapter's responsibility to determine who is given access to enter data into the inventory, and who can view data on the inventory.

The Rules (section 11a) allow Chapter to authorise people to act on its behalf to compile and maintain an inventory and decide who can access its data. Such people should have sufficient experience, knowledge and training in collections management and inventories to exercise these delegated functions competently. Collections management and inventory work requires specific skills and knowledge; it also demands trust and discretion, as the inventory contains sensitive material about a cathedral's collections and people associated with them (such as donors). The Commission advises therefore that anyone to whom authority is delegated by Chapter should ideally have experience working in a museum, library or archives setting specifically on collections, archives and/or libraries management. This is to ensure that they have the expertise to undertake these delegated duties without putting the collections, or the cathedral's reputation, at risk. The individual(s) authorised by Chapter must retain responsibility for governance, decision making and project planning, and if any roles and tasks are delegated further, they must report and justify their decisions on such further delegation to Chapter. If the cathedral does not have expertise in-house, it is advisable to seek advice from a collections management consultant.

Opposite: **"Avarice" panel, Lincoln Cathedral**

The FAC

The FAC's primary roles are to ensure that Chapter is fulfilling its duty of compiling and maintaining the inventory, to consider what items should go on the inventory, and to identify which of these are of outstanding interest. It is also the FAC's role to determine permissions for works, loans or changes to an object on the inventory that is *not* designated as outstanding, according to the Measure. The FAC can also advise Chapter on the inventory and provide helpful expertise in an advisory capacity.

A procedure for regular liaison between Chapter and the FAC must be established to ensure the FAC fulfils its role, especially in identifying items of outstanding interest. Templates can be found on our website for the following documents that can be used to record certification of aspects of the inventory process by the FAC and Chapter:

- certification of inventory / schedule;

- certification of the list / schedule of outstanding items on the inventory; and,

- certification of addition of outstanding items to the inventory.

The Commission

The Commission works with both Chapter and FAC to review project plans and determine dates by which the inventory should be compiled and reviewed, taking into account the situation of the cathedral. The Commission also works with the FAC to approve the list of outstanding items and determines permissions for works, loans and changes to outstanding items on the inventory. In addition, the Commission provides advice and guidance to cathedrals.

4b   The format of the inventory

The 'master' version of any inventory (including all schedules) must be compiled and maintained in digital format. This is to ensure that cathedral inventories can be updated and maintained easily over time.

Most inventories are compiled using a computer, which produces a digital file. This may be in a variety of formats, such as Microsoft Word or Excel, or a database. Given that inventories are working tools to which changes will need to be made as objects move around a cathedral or outside of it, and as collections audits are undertaken periodically, the master digital file must be stored in a way that makes it usable and accessible to key individuals. To avoid loss of data, and to maintain a digital archive of inventories, copies of this digital file must be backed up appropriately in case of loss or corruption of the master file.

A paper copy of the digital file must also be generated at such intervals as Chapter determines.

Digital inventories

There is a range of options for the format of the digital version of the inventory. For cathedrals with a small collection and a low level of collections activity (i.e. few acquisitions, disposals or loans), Microsoft Excel or another spreadsheet-based programme could provide a suitable solution (entering data into an Excel spreadsheet makes sorting information easier than in a Word document, if consistent terms are used). However, it can be easy to delete data in both Word and Excel and for records to be easily confused. It is also harder to track changes, for example when an object's location is changed temporarily. A database is therefore preferable.

A number of collections management databases are in use. At the time of writing, these include CALM (an archive management system), eHive, Axiell Collections, Adlib Museum and Archive, and Adlib Library. When considering which software to use for the cathedral inventory, pose the following questions:

What will the software be used for?

- How easy would it be to migrate the data to a different system if the software became obsolete, or to export data to a different system for data analysis?

- How large is the collection, and how much information will be stored in the inventory? For example, can an Excel file cope with the number of records that it will need to keep? Will the software be used to store images in addition to text?

- What software functionality is needed to compile and maintain the inventory? Is it intended that parts of the database are linked to the internet to provide a virtual collections database accessible to the public? Will Quick Response (QR) or Radio Frequency Identification (RFID) tags be used on objects to aid collection management? If so, will this require a separate database that can link to or incorporate relevant software, or can this be included within an already available product?

- How easy is it to print out the copy of the inventory from the software?

- If choosing an online or cloud-based database, is the cathedral's internet access secure enough for data input to be uninterrupted? For free-to-use software, it is helpful to ensure that its functionality covers everything that is needed, and to check the costs of add-ons. There can be hidden extra charges within free-to-use software packages.

Who will be using it?

- It is important any software is easy to use for both those inputting data, and those searching the database, whilst also being able to ensure there are checks in place to prevent unauthorised changes to the database. Excel is easy to use, but also easy to change data inadvertently. Some databases are relatively easy to input data securely, but can be difficult for those wanting to search the database.

- Will the software be on one computer in one person's office, or does it need to be accessible to multiple people daily? This will help in deciding what licence options are needed, whether this is a single licence assigned to single computer, multiple single licences assigned to multiple computers, or a cloud-based licence where multiple users can access the same file at the same time. It is better to have software that more than one person has been trained to use, for business continuity.

How easy is it to maintain the software?

- How regularly will the software need updating, and what are the ongoing costs? If buying an off-the-shelf product, updates are usually included in the cost of the service. Additional and more regular costs may be needed if creating a bespoke system, due to the custom nature of software.

- How easy is it to make and maintain a duplicate copy of the database? Will this be on a portable hard drive (or hard drives) that are stored off-site? Is it possible to create a regular backup of the database if this is kept on a hard drive? Can this be stored on a web server already maintained by the cathedral? Will the back-up be on a different server that is in a separate physical location from the master database?

GOOD PRACTICE

For those with larger collections, there are several databases available for use that make the management of a higher level of collections activity easier. These range from off-the-shelf software packages and databases used by museums, archives and libraries, through to bespoke software designed to offer additional functionality for the management of each collection in particular. A bespoke option may be preferable, to allow for the database to be built around the cathedral's specific needs and objects, but may be more expensive, may not be compatible with a cathedral's other hardware and software, and runs the risk of becoming obsolete. Off-the-shelf programmes or databases used predominately by museums will still provide the solutions required, but inventory records may need to be adapted to the style and terms used by these programmes. More information on software used for collections management can be obtained from the Collections Trust and the National Archives.

At least one duplicate digital copy should be made of the inventory and stored off-site in a separate location from the master in case of loss or corruption of the master file. There are various ways to back up digital inventory data regularly, such as using a cloud-based server (which must meet UK GDPR standards), Network Attached Storage or an external hard-drive stored off-site. Backing up should be related to usage of the inventory. If it is updated on a daily basis, back-up will need to be

daily; if it is used less often then back-up should be as frequently as entries are changed.

One challenge when using a database is what happens when the software is no longer supported by the parent company. This will rarely happen overnight, as the software company will usually give notice of closure. The use of mainstream, robust software with a wide user base and broad export capabilities can help with this issue. Additionally, to futureproof the inventory, a copy of the existing file should be created and then exported as a CSV (Comma Separated Value) version on a regular basis (this may be monthly for an active inventory, or less frequently for a less active inventory). This format can be used in a disaster situation to recover data using different software. However, CSV has limitations in the types of formats it copies, such as film and photographs, so it is important to check what is being saved in a CSV version. For this reason, cloud-based or network-based storage is better than a hard drive, as an automated synchronisation of the file can be created. More information on backing up data can be found here.

Paper copies

A paper copy of the digital files must be generated in addition to these digital files as a contingency against any catastrophic loss of digital information.

My cathedral's inventory is on paper only – what do I do?

The Commission recognises that a few cathedrals will have an inventory that is in paper format only, as per the previous version of the Rules (2006). In this situation, the Commission will work with the cathedral on the best route towards a digital version of their inventory.

For many cathedrals, a paper copy of the inventory would have been originally produced on a computer. It may be possible to retrieve this digital version, which should then become the master version of the inventory.

For some cathedrals, the digital master file may have been lost. There are the following options to make a digital version:

- manually input data from the paper version into relevant computer software. This is time consuming, but is a good opportunity for the cathedral to undertake an audit of its inventory items and their locations.

- scan the paper version into computer software. This can be done through readily available scanning software, including Optical Character Recognition software. The information on the computer programme will then need to be checked for accuracy / inconsistencies, and changes corrected on the computer. Whilst this is time consuming, it is faster than manual input of data; or,

- scan the paper version into a PDF which is then stored securely. Whilst this is technically a digital version of the inventory, it is not easy to change information in it, and should not be used as a long-term method of keeping and maintaining a digital inventory.

My cathedral uses the paper copy as its main version, and the digital back-up is only changed irregularly. What do I do?

The Rules require that a paper copy of the inventory is kept in a secure location and that the master version is maintained digitally. It is not acceptable for a master copy to be kept on paper. It is not recommended that the paper copy of the inventory is stored in a loose-leaf binder as this is not considered to be sufficiently secure.

When compiling or maintaining the inventory, it is acceptable that parts of the inventory are printed out and annotated on paper, for example when adding new items, undertaking a location check, and checking entries for errors. It can be easier to take a piece of paper to the object rather than bring the object to the computer. However, all new information should be added to the main digital inventory as soon as possible, and the loose-leaf paper draft version destroyed immediately, to avoid confusion as to what is the most up-to-date copy of the inventory. In addition, entering information onto a printed copy and then entering onto the database doubles the amount of time spent on an entry, therefore consider whether using a laptop is more resource efficient.

Entry of data onto the digital inventory must be undertaken only by those given the authority to do so by Chapter.

How often should the paper copy be updated?

The frequency of updating the paper copy depends on how large the inventory is, and how often it is changed. The main considerations are how often entries on the inventory are changed, balanced with the practicalities of printing out a copy. It is good practice for paper copies to be updated as part of the annual inventory report to the FAC. However, the Commission recognises that for those cathedrals with large collections and active collections activities, updating the paper copy at longer intervals, such as 5-10 years, may be more feasible.

As the paper copy is a duplicate copy of the inventory, it should be made using archival-quality paper, to ensure that it is able to be used if the digital versions fail.

4c How do I compile the inventory?

The Commission recognises that cathedrals will be at different stages of compiling and maintaining their inventories. The following sections provide guidance that can be adapted to the particular resources and capacity of your cathedral.

There are six key aspects to compiling an inventory:

- listing items to be considered for inclusion by the FAC. This must be done in conjunction with Chapter;

- undertaking assessments of significance;

- agreeing inclusions and significance with the FAC;

- agreeing which fields to include (see section 5d);

- recording items with their significance scores;

- marking items with their unique reference (see section 4g); and,

- photographing items to attach to the record (see section 4h).

Helpful advice on managing a project to compile or maintain an inventory can be found in section 7b, below.

ACCREDITATION

The decision to become accredited should be taken as early as possible in the sequence: otherwise every object record may need to be revisited to add extra fields.

A note on new accessions and loans

All new accessions and loans should be added to the inventory as they are collected, if they are deemed by the FAC to be of special architectural, archaeological, artistic or historic interest. The Cathedral Archaeologist can advise Chapter and the FAC on the significance of finds made during the course of archaeological work. It is important not to wait, even if the relevant section or category it belongs to has not yet been tackled, and even if information for the object is temporarily incomplete. Delaying will add to existing backlogs.

We provide templates on our website for recording both loans in and loans out.

More information on accessioning new items can be obtained from the Collections Trust.

4d   What information should go into the inventory?

The suggested fields below are the minimum that should be recorded. Our object list template contains a full list.

FIELD	DETAILS
Inventory number	This should be a unique number.
Category (type) of object	
Name of object	
Number of objects (if a group)	
Location	A specific location (e.g. "north transept, west wall" or "case 9 of cathedral plate display in chapter house") should be used.
Type of constituent material(s)	
Name of artist / craftsperson with dates of birth and death, if known	
Country of manufacture	
Known or approximate date(s) of object	
Details of any signifying marks or inscriptions, or distinguishing features	
Provenance	
Dimensions (metric)	
Weight (metric; precious metals only)	
Brief description(s) (subject matter)	
Note of condition	
Note of conservation record	This should include reference to any conservation and post-conservation reports that are available in the cathedral records
Note of photographic record	
Summary of significance	

NOTES
Chapter may decide not to give inventory numbers to objects that are only in the temporary custody of the cathedral, such as loans in.
Standardising this information using a drop-down menu can help to search for categories of objects, eg plate, monument, altar, textile.
Standardising this information using a drop-down menu can help to search for objects.
If the object is in use, it should be noted as 'in use' and the building in which it is normally used should be stated. For objects that are regularly moved, the current location and normal location can be listed. If the object in use is moved from its usual building, the change of location should be recorded. It is useful to not delete a previous location, to enable previous locations to be searched in the event of an item becoming 'lost'.
This is particularly important when there are several objects which bear a superficial resemblance to each other.
Including any evidence of damage.

ACCREDITATION

For cathedrals moving towards accreditation, there are more fields needed, including Object Entry. Object entry numbers are unique, and are different to the inventory number. Object entry numbers are provided for objects as they enter into a cathedral, but before they are put onto the inventory. Most objects in a cathedral will not have an object entry number, as they were in the cathedral before the inventory was compiled. For those cathedrals wanting to introduce object entry processes and numbering, the Spectrum processes on Object Entry are very helpful. More information can be found from relevant accreditation bodies such as [Arts Council England](#) and the [Archives Accreditation Service](#).

Terminology for inventory entries

When considering the categories and names for objects, it is important to ensure that consistent terminology is used. This is so that the inventory can be easily searched for specific categories or objects. (For example, when creating a record for a chasuble, it could instead be entered as a casula, but would then not show up in a general search for chasubles.) In digital inventories, drop-down menus are a very useful way to control object name entries.

GOOD PRACTICE

There are a number of thesauri available when considering the categories and names of objects. Most of these have been designed for non-ecclesiastical objects (for museum or archaeological objects, for instance, the British Museum Thesaurus or FISH) and therefore do not cover a lot of ecclesiastical objects. One of the most useful thesauri is the [Getty Vocabularies](#).

Multiple object entries

In most cases, if a collection of items is to be put onto the inventory, each separate item must be individually recorded. Exceptions would be archaeological materials (for example bones or pottery sherds the significance of which derives from their group value rather than from each or any individual sherd or bone), archival materials, and uncatalogued groups of objects (such as architectural stone). These can either be added as a schedule (see section 4f, below) or each object in the collection can be catalogued with a group number followed by a full stop and then consecutive individual identification numbers. For example, individual objects in a group labelled CATIN.2020.119 would be marked as CATIN.2020.119.1, CATIN.2020.119.2, CATIN.2020.119.3, and so on.

GDPR

It is important for the inventory to be GDPR compliant both when collecting and storing information and when providing access to that information. When considering the fields for an inventory, it is important to keep sensitive information, such as donor information, location and insurance value, in separate fields. This [partial record access] enables selected fields to be made available when access is required.

When new items are added to the inventory, such as new artworks, or new information is added to inventory records, such as oral histories, those involved should be informed as to how their information will be collected, stored, and used.

4e   Special categories

There are some types of objects that require different information to be entered onto the inventory. All of them should still state when they are outstanding items on the inventory, or contain outstanding items.

Loose architectural, archaeological and miscellaneous objects and fragments

Groups of loose objects and fragments may be entered onto the inventory as a schedule (see section 4f, below). Uncatalogued or unsorted materials that are entered as a group can be reviewed and added as individual items at a later date, as agreed between Chapter and the Commission,

Musical instruments

Inventory entries for organs should include under the description field the organ stop list and a description of the organ case, unless the case has a separate entry.

Printed books, manuscripts and archival materials

Archival materials include both historic and working records (for example foundation charters, chapter minutes and records, land registers, deeds, architectural and archaeological records (written, drawn and photographic), episcopal or parochial/diocesan records, conservation and post-conservation reports, etc.).

Printed books and manuscripts that are part of a pre-existing catalogue can be entered onto the inventory as a schedule. If there is no pre-existing catalogue, the following additional fields on the inventory should be used for printed books:

*   press mark or other library identifying notation;
*   author and short title (including volume number if relevant);
*   place and date of publication;
*   format or measurement of page;
*   any special characteristics; and,
*   published studies of the book (if any).

For manuscripts these additional fields should be used:

*   location to include library number-shelf mark (if applicable);
*   author & title / contents; language; illumination;
*   date and place of origin;
*   size; foliation / pagination;
*   type of constituent materials;
*   any special characteristics; and,
*   published studies of the manuscript (if any).

For archival materials, these additional fields should be used:

*   the inventory number may include the suffix code (if any);
*   name of collections / item, and description of contents;
*   physical description, including number of items;
*   date, or range of dates; and,
*   administrative and custodial history / provenance.

Special characteristics for books and manuscripts may include evidence of earlier ownerships, details of illustrations, noteworthy binding, hand-written margin notes, bookplates or other indications of ownership, provenance and so on. Also worth including are notes of any imperfections, such as missing leaves, quires or plates, misbindings and so on. It is important to record any features that must be retained during conservation treatments. Valuable information can be lost if the significance of imperfections are not fully understood. For these reasons, specialist advice from conservation professionals with relevant experience and skills should be sought for all remedial work to books, manuscripts and archival materials.

It is assumed that the majority of archival entries will be for groups of objects for reasons of practicality. However, entries can be expanded to include descriptions of individual items, or sub-sets, if more information about them is useful.

For books, manuscripts and archival materials, the photographic record may be a digitised copy of the item, records on microfiche or microfilm.

4f Schedules

The Measure and Rules allow Chapters to compile and maintain inventories as separate parts or 'schedules'. Schedules can be used for a variety of reasons:

- to add an existing catalogue of items, for example books, archival materials and excavated materials. This is particularly useful when those items are cared for by another institution. It removes the need to re-number items that have existing numbers; or,

- to add collections of materials that have not yet been catalogued or sorted, for example pieces of worked stone.

In addition, schedules can be used to group objects for ease of identification. A schedule may therefore be used to identify items which are:

- designated outstanding*;

- on loan to other institutions*;

- in the custody of the Chapter but not their ownership, for example loans or Parish Plate deposits;

- deaccessioned or disposed of; or,

- missing

* Another way to identify Outstanding items and items on loan is by using a specific field in the database. This avoids double numbering of such items, and is preferable to a schedule.

As with the main inventory, each schedule must be agreed by the FAC. Each schedule should be given an individual number on the inventory and listed with a description of its content and where the master copy is located. The master copy (such as a library catalogue) should also be updated to reference the inventory by identifying objects listed within it as part of this schedule and should include the inventory number assigned to it.

A template for certification of a schedule can be found [here].

Entering schedules onto the inventory

When entering a pre-existing catalogue on the inventory as a schedule, the following information should be included on the inventory:

- inventory number;

- number and title of schedule;

- existing reference code(s);

- brief description of the contents of the schedule;

- total number of constituent items within the schedule;

- name of collection/donation/bequest (if known);

- name of donor / collector with dates (if known); and,

- * (starred) identification of any items within the schedule which are deemed to be 'outstanding'.

Not all items in pre-existing catalogues will necessarily be of high enough interest to go on the inventory. It may therefore be necessary to list in the brief description the items in the pre-existing catalogue that are to be included as inventory items (with items of outstanding interest being starred for identification). It can be helpful to break down catalogues into different schedule entries, to avoid including unnecessary information in the inventory, though this may be a time-consuming task for larger collections.

Groups of materials that have not yet been catalogued can be entered onto the inventory, as a whole or in part, under a single number. Separate assessment and cataloguing of these groups can form a discrete part of the inventory project, with a timescale for this work being decided between Chapter and the Commission. The inventory record for such groups should include:

- inventory number;

- location;

- total number of constituents;

- brief description of the collection, including the building or object of which the fragment originally formed a part (if known);

- bibliographic references to a published catalogue; and,

- note of any photographic records.

Items owned by Chapter held elsewhere

Items that are considered to be of architectural, archaeological, artistic or historic interest or outstanding interest and that are owned by Chapter but are held elsewhere need to be included on the inventory. This includes items held in trust, items that may be in other locations such as clergy housing, and items held in other repositories for their long-term security and care, for example items in the local archives or libraries.

Loans

Loans include objects belonging to Chapter going outside the cathedral to other institutions (loans out), and objects being lent to Chapter by others (loans in). Museums and galleries typically define loans as 'short-term' (up to one year) or 'long-term' (longer than one year) but for cathedrals the same permission is required under the Measure in both cases.

All objects that are on loan to or from the cathedral. and which the FAC considers to be of architectural, archaeological, artistic or historic interest, should be recorded or identified. It is important to keep a separate schedule for loans in: this is to ensure that there is a record of the objects with whose care Chapter has temporarily been entrusted, but that there is no risk of them being mistaken for objects that Chapter owns. A separate schedule could also be kept for loans out, to ensure the cathedral can tell at a glance what is physically in their possession and what is not.

The Collections Trust has very useful information on suggested procedures for loans in and loans out.

Entries in the Inventory for both loans in and loans out should include the following information:

- any identification numbers for the object (e.g. museum or lender accession number);
- whether it is an outstanding item;
- the purpose of the loan;
- name and address of the lender or borrower;
- date the object entered / left the cathedral;
- date of and parties to the written loan agreement, with a reference to the loan agreement;
- duration of loan;

- reference to written documentation agreeing to the loan (e.g. FAC / CFCE minutes);
- insurance arrangements;
- specific requirements under terms of loan (e.g. packing, transport arrangements, care or conservation requirements, display requirements);
- condition of object (before and after loan);
- notes of any conservation work undertaken in preparation for loan;
- photographic record of object; and,
- date when loan approved by FAC or CFCE.

We provide templates on our website for recording both loans in and loans out.

Items held in trust

All items that Chapter holds as a trustee and which the FAC considers to be of architectural, archaeological, artistic, or historic interest must be entered on the inventory. This can be in a separate schedule. In addition to the standard fields, the inventory record for such items should also contain the following:

- the name of the Trust, the objects of the Trust and the Charity Commission registration number;
- for any other Trusts, details of the beneficiaries;
- dates of the acquisition as Trustee;
- date of and parties to the Trust instrument;
- if the Trust is not permanent, details of when the Trust will terminate; and,
- specific requirements under the terms of the Trust: this may include information on the care and conservation of the item, or its use by Chapter.

Temporary object entry numbers

A cathedral might find it desirable for temporary object entry numbers to be assigned to items. This may be, for example, for a loan in to the cathedral, or when a piece of fabric is temporarily classed as an object. A list of temporary object entry numbers should be kept in a separate schedule or section of the database. To keep temporary numbers discrete, each acquisition loan can be given a number, with each object in that loan given a numbered suffix (e.g. AL 112/1 or AL 2021/3/1).

4g   Marking and labelling

Marking and labelling is an important element when compiling the inventory. Ideally, it should be undertaken once an object has been agreed for inclusion on the inventory by the FAC.

Objects should be marked with their inventory number: this is to ensure that each individual object can be identified and linked to its inventory record. Labelling is important if something happens to an object that needs recording, such as damage, conservation work or movement to a new location.

It is important that groups of objects are marked with a unique inventory number. This is often done by assigning each object a group number followed by a full stop and then consecutive individual identification numbers. For example, individual objects in a group labelled CATIN.2020.119 would be marked as CATIN.2020.119.1, CATIN.2020.119.2, CATIN.2020.119.3, and so on.

GOOD PRACTICE

The Collections Trust registers the codes that museums use for their inventories. More information on numbering objects and how to register them is available from the Trust's website.

Advice on appropriate marking and labelling techniques to use for each type of object, with written instructions and videos, is available from the Collections Trust. Share Museums East has further details on how to mark objects using different types of label. This is available from their website, under "Collections Resources".

Many of the materials required for marking and labelling have health and safety considerations which must be properly managed. This may include creating risk assessments, following COSHH (Control of Substances Hazardous to Health) procedures and wearing Personal Protection Equipment (PPE). Please see the Health and Safety at Work Act 1974 and COSHH regulations for more information.

4h   Using images

It is essential to include images of objects in the cathedral inventory to enhance the record of each object (unless, in rare cases, the FAC advises Chapter that it considers it impracticable for a photographic record of the object to be included).

Photographs help to identify and share information about an object; can be useful for collections care by recording the condition and changes in the condition of objects; and can be particularly helpful in the event of a disaster by making it easier for the item to be identified, found and returned.

Where resources are limited, photography for identification purposes, and particularly photographs of outstanding inventory items, should be prioritised over photography for the purposes of condition checking, as maintaining an up-to-date record of an object's condition may require several images, regularly updated.

Taking the image

Inventory photographs can be very simple: the image should be in focus, taken squarely, and should fill as much of the frame as possible. Practical information on taking, naming and storing digital images can be found in the SHARE *Guide to Digitisation*.

Wherever possible, images should be taken with a digital camera against a plain and consistent backdrop. A bed sheet can be a good background as it creates a gradual curve between the item and backdrop to reduce shadow. Moving the object away from a vertical background will also reduce shadow if the photograph is being taken on a horizontal surface. It is important that fragile objects are properly handled and supported during photography, and any potential damage from lighting or flash photography should also be considered.

As photographs can make it difficult to show scale or perspective, including a scale bar next to the object in the image can be very helpful. In addition to taking a photo square on, taking another image at an angle can also help with perspective, as well as showing as much visible detail as possible. Many digital cameras have gridlines to help ensure that images are captured squarely.

Reflections from shiny objects, such as glazed frames, can obscure or distort images. This can be avoided by setting up a light tent around the object. Light tents can be bought from most camera shops and online.

It is a good idea to include a photograph of the mark or label on the object, or to include a slip of paper with the object's inventory number in at least one image, in order to limit confusion if an image is not uploaded to the inventory record straight away.

Including a photograph of an object in situ can also be a very good way of providing information on its context and location within the cathedral or precinct.

Storing and linking to the inventory

Digital photographs can be attached to inventory entries by reference number, linking, or embedding the image. The number of images, and the functionality and storage capacity of the inventory software being used, will help determine which method is best.

Many digital cameras are exchangeable image file format (EXIF) compliant, which means that they store metadata (a description of what the data contains) on the image capture. Metadata can be enhanced after the image is uploaded from the camera to capture additional information such as keywords, descriptions and information on copyright.

Naming images using the object's inventory or other reference number can be problematic if more than one image is added. Digital cameras also assign a number to each image, but this can be re-set by mistake or by reaching the upper limit of the numbering system. It is therefore recommended that digital images are given a new unique identifier when they are uploaded that is different to the object's inventory number. The unique identifier can be used as the file name for the image file, which should be recorded in the inventory entry.

4i   Working with volunteers

Volunteers can be a huge asset to an inventory project. However, to be successful, their roles should be carefully developed.

Identify appropriate roles. Think about which roles are needed and how they can appeal to volunteers. Possible roles include:

* data collation—collecting information about objects that don't already have records;

* reconciling existing paper records with objects – many collections are already catalogued but the paper records need reconciling with the physical object;

* data entry—taking the information from the data collation stage and creating records from it;

* photography;

* assessment of significance (where the volunteer has the relevant expertise); and,

* marking and labelling

If the cathedral has a volunteer coordinator, they can assist with writing role descriptions which detail the attributes and time commitment required. Always ask volunteers to assign copyright of work undertaken to the Chapter.

Find the right people. As these are specialist roles, approaching special interest groups may be beneficial. For example, the Arts Society Church Recorders have the skills for data collation. Due to the specialist skills needed for the roles, interviewing potential volunteers to check they are suitable may be advantageous. Local universities may also have students of relevant subjects such as history, archaeology or architecture who may be able to help.

Plan support time. The specialist nature of these roles may require certain members of Chapter or staff to spend more time supporting volunteers. Volunteers with no relevant prior experience would need to be carefully supervised. Templates, how-to guides, worked examples and induction time may all assist with managing effectively. It will also be necessary to ensure volunteers have access to the equipment they require, for example cameras and computers.

MANAGING ACCESS TO AN INVENTORY

5a   Access to change records
5b   Access to view records

5a   Access to change records

Adding records

New objects coming into a Chapter's ownership or custody will need to be assessed for possible addition to the inventory. If they are deemed significant, a new record will need to be created for each.

- It is the Chapter's responsibility to notify the FAC of all new acquisitions.
- It is the FAC's responsibility to decide whether an object is added to the inventory.

New records must therefore only be added after consultation with the FAC. The Chapter and FAC can delegate this responsibility to a dedicated Working Group, but a reporting mechanism must be developed— this could be in the form of a standing item on the FAC agenda. It may also be helpful for Chapter and the FAC to agree on a suitable acquisitions policy.

Changing records

Each Chapter and FAC can decide whether to delegate responsibility to authorised individuals to make changes on their behalf. If so, they must also determine:

- what can be changed immediately and reported to the FAC (see section 6, below). This might include changes that are necessary to manage the object properly, such as recording a new location; and,
- what will require discussion with the FAC before an alteration is made. This might include changes that note an alteration to the object or to the understanding of the object, its history or significance, such as recording conservation work or new information uncovered about the object.

Responsibility for altering records can also be delegated by an FAC to a designated member of cathedral staff.

The Commission advises that the number of individuals who can make additions and changes to the inventory is limited. The pool of people needs to be large enough so that if someone leaves the organisation, the inventory can still function. However, it should be small enough to ensure that the management of the inventory can be tightly controlled. Any changes should be initialled by the individual making the amendment to create an audit trail.

Opposite: **York Gospel, York Minster**

5b   Access to view records

Cathedrals need to consider if they wish to make inventory records available to members of the public to view, and if so, what criteria will be used to make these decisions.

It is very rare that full access to records is provided. The inventory holds information that should not be in the public domain, including:

- personal data about donors, requiring consideration of data protection laws; and,
- security data, including locations and valuations.

For these reasons, the cathedral should check the reasons for a full record request. If full access is agreed, the enquirer should sign a confidentiality agreement, and usage agreement to ensure the information is used in agreed ways only.

More commonly, partial access to records is allowed. However, the cathedral may still need to check the validity of requests, to ensure overarching security of the collections is maintained. For example, the cathedral may wish to deny a request for information on all its plate collection without a valid reason being provided by the person making the request.

A major advantage of digital databases is the ability to hide sensitive information by limiting access to specific fields. It is more likely to be difficult to hide fields if the inventory is not in a database (for example if it is in Microsoft Word), or if the paper-based inventory is being used to provide access. In these situations, it may be possible to print out a version of a record without the sensitive material included, or for a member of staff or volunteer with appropriate access rights to consult the records on behalf of an enquirer.

Online inventories

Some cathedrals are starting to make parts of their inventories available online. This is a good way of increasing interest in and knowledge of the cathedral collection. It can also reduce staff time spent answering simple enquiries (though may increase the number of more complex enquiries). Before deciding to make a cathedral's collection available online, the following points should be considered:

- what should be available online? Are there any full records that it would be inappropriate to make public (for example, if an object is missing)?
- how will the cathedral ensure adherence to data protection and privacy laws?
- is there the resource to cope with additional enquiries about the collection? Online collections lead to more interest, and therefore more viewing appointments and enquiries.
- which fields should be made visible? For example, locations, valuations, donor information and associated people fields should all be removed from any public visibility.
- will an income stream be lost if images of the collection are provided without watermarks?
- what are the ongoing associated costs?
- can the cathedral's IT infrastructure support online access?

Ultimately, security of the collection is key. If online access to an inventory would make it easier for someone to find and identify a valuable portable item, such as a silver cross, within the cathedral (even if location fields are not included) then Chapter must decide whether this information should be widely available.

The Collections Trust website has a section dedicated to digitising collections including putting collections online.

Below: **helm of the Black Prince, Canterbury Cathedral**

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MAINTAINING AN INVENTORY

6a Temporary changes
6b Permanent changes

The cathedral Chapter must make an annual report to the FAC on the contents of the inventory or progress made in compiling the inventory. This report must certify the accuracy of the inventory (or any part of it which has so far been compiled) and describe any alterations that have been made to the inventory during the preceding twelve months. It can be helpful for Chapter and FAC to agree to this report being an agenda item on a specific FAC meeting each year. Following the receipt of this report the FAC must confirm to the Chapter its acceptance of Chapter's report.

Any new acquisition by Chapter (either by purchase or gift) that is considered by the FAC to be of architectural, archaeological, artistic or historic interest must be recorded on the inventory (if necessary, as an 'outstanding' item, following consultation with the Commission).

The loan, sale, disposal or loss of any object entered in the inventory must be recorded. It is vital that the inventory is kept up to date, and that changes are recorded as soon as possible. This is to prevent an administrative backlog building up, or object locations (and potentially objects) being lost.

Changing records

To keep the information in inventories up to date, it is necessary to alter records within a specified time period as agreed by the Chapter and FAC. The Chapter and FAC will need to agree who can make these changes and what level of authority is to be delegated to them.

Opposite: **Dresden cope, Coventry Cathedral**

6a   Temporary changes

Most temporary changes occur when an item moves location, or when a piece of fabric is temporarily removed from the building. Moving objects can be a time of high risk if the movement is not documented well.

Objects temporarily leaving Chapter's custody

Changes to the inventory are necessary when an object leaves a Chapter's custody, even temporarily. This may be due to the item being loaned, for conservation off-site, for a valuation, or to be used. Similarly, permission is required under the Measure for objects in the Chapter's ownership or possession to leave their custody, even temporarily. Objects on the inventory should therefore not leave the custody of Chapter without an application to the FAC or the Commission, depending on an object's status.

Objects on deposit or loan can be returned to the cathedral without further permission from the FAC or the Commission. However, the inventory will need to be updated as appropriate.

If a temporary removal occurs, the object's record should be updated with:

- the date the object left the cathedral;
- the details of where the object has gone;
- contact details for a named individual at the temporary location;
- the condition of the object immediately prior to leaving the cathedral, including images, or a link to a condition report and images; and,
- the date the object is due back to the cathedral. This could be held on an 'alert' system to ensure its return is followed up by the cathedral, and the object is returned on time.

Where a cathedral is responsible for items owned by other institutions, the Commission advises developing procedures that require seven days' notice from depositing bodies if an item is to be temporarily withdrawn. This should provide Chapter with the necessary time to complete the paperwork required to comply with the Measure.

Lost items

Items may be lost for a variety of reasons. They may be temporarily misplaced in the cathedral, inadvertently lost and no longer in the cathedral, or stolen. It is advisable to have a policy and procedures on what to do if an item is found to be lost or stolen. A helpful procedure for recording and reporting lost items can be found on the Collections Trust website. The loss needs to be recorded in the inventory, and the item should remain on the inventory. Information in the inventory, such as previous and last known locations, should be helpful for finding the item.

Objects moving within the cathedral

Some objects move within the cathedral on a regular basis. This may be when items are moved for conservation in another area of the cathedral, or when ceremonial items such as croziers and historic copes are used in services. Permission is not needed from the FAC or the Commission for such movements.

However, objects that move location frequently are at particular risk of becoming lost if records are not kept up to date. There are a number of ways to reduce this risk. For objects that are moved for less than 7 days, or on a regular basis, some form of extra record, such as a production slip or location list, may be used to record their movement. It is important that the original location record is not deleted in the inventory, but scored through, or a normal / current location field is used to record the changing locations. This is to ensure the object is returned to its original location.

For items that are to be moved for more than 7 days, the object's record should be updated with:

- the date the object was moved;
- the details of the temporary location; and,
- the date the object is due back in its original location.

Fabric turning into objects temporarily

Items that normally fall outside the scope of the inventory sometimes undergo works, such as conservation or loan, which mean they should be temporarily added to the inventory. Examples include works to windows that requires their temporary

removal. For an item to be removed from the fabric of the cathedral, permission must be sought from the Commission or FAC. Records should therefore be created only after permission has been granted.

When recording these types of items, they should be assigned a temporary entry number rather than being accessioned to the permanent inventory collection. These numbers may form a separate schedule to avoid confusion with numbering. Records should include a pre-removal description and photographs as well as a description of the removal process, or a reference to the condition report, and the number of parts created (for example if a window is removed in sections). When the object is returned, the record should not be deleted but rather updated to reflect the fact it has returned to form part of the fabric.

6b   Permanent changes

Accessioning new objects

Items that come into the ownership or custody of Chapter will need to be assessed as to their significance. Protocols for assessing their significance should be followed, and the items added to the inventory.

Sometimes items that are part of the fabric are removed from the building permanently, after permission has been received from the Commission. Examples include roof bosses and other architectural elements. If the items are considered to be of interest or outstanding by the FAC, after their removal they will need to be added to the inventory.

A template for certification of the addition of outstanding items to the inventory can be found here.

Changing status of inventory items

As new information on items is obtained, and during regular reviews of the inventory, it may be necessary to review the significance of the item and possibly upgrade or downgrade its status. The processes for changing the status of an object are the same as for assessing significance of any item for the inventory. If an item after re-assessment of its significance needs to be removed from the inventory, processes for deaccessioning of an object must be followed.

As significance is the responsibility of the FAC, a change to a record should not be made without consultation, and with the Commission for changes to items of outstanding status. Once a decision is reached to change an object's significance, the record should be updated with a note listing the date the change took place, the rationale for the change in status and relevant references to FAC minutes. The record should also note the object's previous status.

Deaccessioning of objects

If the decision has been made to downgrade an item and it is no longer of high enough significance to remain on the inventory, it must be deaccessioned.

Note that this is different to disposal of an item, which is permanent removal of the item from the ownership of Chapter, and for which deaccessioning will also need to happen before it is disposed of if it is on the inventory.

Items that are on the inventory and leave the cathedral on loan should <u>not</u> be deaccessioned. A separate loans out procedure is needed for this.

All items for deaccessioning must be agreed by the FAC and decisions recorded in FAC minutes. Useful information on deaccessioning can be found on the Collections Trust website.

Once a decision to deaccession an item has been taken, the inventory record should be updated with the following information:

- that the object has been deaccessioned;
- the date it was deaccessioned;
- a reference to the paperwork and any relevant minutes (e.g. FAC minutes) relating to the deaccessioning; and,
- the reasons for deaccessioning.

The inventory entry for the object should not be deleted or re-used.

Disposal of objects

Disposal of objects involves their permanent removal from the ownership of Chapter. This includes objects that are being sold, given away, thrown away or objects that have been lost. Objects that are being disposed of through sale, gift or destruction require an application to the FAC or the Commission. Records should therefore not be changed without a successful application under the Measure. Objects that have been lost will need to be reported to the FAC or Commission.

More information on disposal, including ethical decision-making and communicating decisions, can be found in the very useful toolkit produced by the Museums Association.

Useful information on processes can be found on the Collections Trust website.

Objects of significance that are not owned by Chapter but are in their custody (such as parish plate in the cathedral's treasury) must also be recorded on the inventory. Permission is not required from the FAC or Commission to permanently return these items but this 'disposal' should also be recorded on the inventory.

Once a decision to dispose has been reached, the object should be fully recorded with photographs. The inventory should be updated, recording:

- that the object has been disposed of;
- the date the disposal took place;
- the method of disposal;
- the name of any individual or organisation the object was disposed to;
- a reference to the paperwork and any relevant minutes relating to the disposal including transfer of title records;
- the date of approval of the disposal by the FAC or CFCE;
- the rationale for the disposal; and,
- if the object was disposed to another collection, the number it has been given in that collection.

As with deaccessioned objects, the inventory record for objects that have been disposed of should not be deleted or re-used.

A template for disposals can be found here.

APPENDICES

7a   Managing an inventory project

Tackling the inventory can feel like a difficult task, particularly when cathedrals face other pressures on their resources and time. To make it more manageable, the inventory could initially be compiled with basic data to make sure all objects are recorded, and other fields added at a later date. Viewing the project as a series of smaller tasks is a good way to make progress, and a useful tool for sharing workloads.

Task 1: Establish who needs to be involved in decision making

As the Chapter and the FAC each has responsibilities in respect of the compilation of an inventory it is vital that both parties are included in decision making.

GOOD PRACTICE

Establishing a working group is one way of achieving this. When deciding the composition and remit of a working group, the Commission would advise asking these questions:

- Which members of the FAC are best placed to assist the work on the inventory? Should a member of the Chapter sit on the working group as well as any person authorised by the Chapter to complete the inventory on their behalf?

- What is the working group's remit and delegated authority?

- How often will the working group meet?

- How will agendas and minutes be produced?

- How will the working group report back to the Chapter and the FAC?

- Is additional professional support needed? This could include an advisor from a local heritage service.

Once parameters have been established it may be helpful to draft Terms of Reference for the working group to be approved by Chapter and the FAC.

Opposite: **Minley flagon, Guildford Cathedral**

Task 2: Determine what already exists

Determining what already exists in terms of an inventory to assist with the compilation and completion of the inventory is fundamental.

GOOD PRACTICE

For a cathedral with a very large number of objects, the table below is a good way to plot what is required. Once the grid is complete, it provides a clear picture of what work is outstanding for each collection.

Category	Listing complete?	Assessment of significance complete?	Agreed for inclusion by FAC?	Items recorded?	Photography complete?	Marking complete?
Collection A	yes	yes	yes	underway—85%	no	no
Collection B	yes	underway—25%	no	no	underway—25%	no
Collection C	in excavation catalogue—consider scheduling?	yes	no	schedule?	yes	no
Collection D						
Collection E						
Collection F						
Collection G						

Task 3: Identify other objects that might need to be included that are specific to the cathedral

The inventory is the tool used to identify items that are intrinsically important to the cathedral's liturgy or history. They are items whose removal or fundamental alteration would inhibit the cathedral's ability to tell its story. Each cathedral is different, meaning it is not possible to provide a standard list of such objects: using section 3 of this guidance, Chapters and FACs should determine which items that should be included on the inventory for your cathedral.

Task 4: Establish who will compile and maintain the inventory records

Compiling and maintaining the inventory requires different skills at different stages. For example, those who understand how an object is used may be best to describe it and understand any nomenclature preferences, while those with data entry skills may be advantageous at the record creation stage.

When undertaking the inventory, cathedrals could gain help from:

- staff (including the Cathedral Architect and Cathedral Archaeologist);

- volunteers including the FAC (see section 4i, above);

- special interest groups (see section 7b, below);

- consultants (perhaps in collaboration with other cathedrals, if feasible);

- other cathedrals, who will have experience and expertise that they may be willing to share;

- local heritage services, especially National Portfolio Organisations;

- Specialists and experts, including academics, to help identify and designate significance; and/or

- associations such as the Cathedral Archives, Libraries and Collections Association that can be used to contact others with responsibility for the inventory: membership can be requested by contacting the membership secretary.

Task 5: Develop a project plan

Once the scope of the project and the resource available are understood, it will be possible to develop a project plan. This is a good stage at which to discuss the plan, necessary resources, including costs, and timescales with the Commission.

Helpful areas to think about include:

- Assigning roles and responsibilities: identifying who is responsible for an area of the inventory will ensure all work progresses.

- Prioritising work: chapters should determine the order in which to undertake tasks. Work could be prioritised by:

- Identifying the most vulnerable collections.

- Identifying collections that are already catalogued and can therefore be added as schedules.

- Identifying collections that can be easily added as information is readily available about them.

- When thinking about prioritisation it is also helpful to see which tasks could be grouped. For example, could all photography be undertaken together rather than scheduled for individual collections, or could listing and photography happen together?

- Agreeing realistic timescales: the plan needs to work for the resources of the cathedral. Timescales should include an overall estimate of the project length and milestones within it. These should be agreed by Chapter and the FAC. The Commission must also be consulted on timescales for completion.

- Considering costs and agreeing the available budget for the project.

The project plan will be a useful document to refer to when reporting progress to Chapter, FAC and the Commission. A template project plan is overleaf.

TASK	OWNER	RESOURCES	BUDGET	TIMESCALE	NOTES
List all plate	Head Verger	Inventory sheets, pencil	None	December 2025	
Assessment of significance for textiles	Textile Contractor	Information about collection; access to collection	£5,000 from the Friends	July 2023	Ask FAC for recommendations
Photograph furnishings	Arts Society Volunteers	Camera; measurement scale; colour scale; wipe-clean labels and pens; list of furnishings and their locations /	£500 expenses	December 2021	Every other Thursday

Task 6: Begin working through the project plan

The project plan will help progress to be made in all areas that still require work. As decisions are made about how the inventory is compiled, a document should be produced to help record these decisions and the reasons for them.

7b   Where to get help

There are lots of organisations with helpful information on inventories and collections management, including local and national museums, galleries and archives, colleges and universities, and local history groups.

- **The Commission** is always happy to give advice on inventories and collections management. Further information is available on our website: https://www.churchofengland.org/more/church-resources/churchcare/contact-cathedral-and-church-buildings-division.
- **The Collections Trust**: https://collectionstrust.org.uk/.
- **Spectrum** is the UK collections management standard used by museums of all sizes and resources. It contains lots of helpful guides, process charts and templates for collections management procedures, many of which are useful for cathedral inventories: https://collectionstrust.org.uk/spectrum/.
- **The Cathedral Archives, Libraries & Collections Association** (CALCA)—contact the Membership Secretary**:** https://cathedrallibrariesandarchives.wordpress.com/membership/.
- **The National Archives:** https://www.nationalarchives.gov.uk/archives-sector/advice-and-guidance/managing-your-collection/developing-collections/.
- **National Archives Accreditation Standards:** https://www.nationalarchives.gov.uk/archives-sector/archive-service-accreditation/supporting-guidance/.
- **Arts Council Museums Accreditation Standards:** https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/uk-museum-accreditation-scheme.
- **Historic England:** https://historicengland.org.uk/about/contact-us/local-offices/.

We also recommend that those working on inventories in cathedrals seek to collaborate with each other. Working together can help to promote and develop collections care, share best practice and reduce costs.

Help assessing significance

In addition to the expertise of the Cathedral Architect, Cathedral Archaeologist and members of the FAC, there are a number of special interest groups that can be consulted by the cathedral when considering what has sufficient significance to be included on the inventory. Local or national museums, galleries and archives, and DAC Advisers may be approached for help with the significance of objects. The following is a list of the useful sources of advice, but is not exhaustive:

- The **national amenity societies**: The Ancient Monuments Society: https://www.ancientmonumentssociety.org.uk/; The Council for British Archaeology: https://new.archaeologyuk.org/; The Society for the Protection of Ancient Buildings: https://www.spab.org.uk/; The Georgian Group: https://georgiangroup.org.uk/; The Victorian Society: https://www.victoriansociety.org.uk/; and The Twentieth Century Society: https://c20society.org.uk/. Whilst these societies tend to focus on building fabric, they will have contacts with specialists in specific areas.
- The **Antiquarian Horological Society** database of turret clocks: https://www.ahsoc.org/.
- **Archaeology Data Services** for reports from formal consents such as Scheduled Monument Consent: https://archaeologydataservice.ac.uk/.
- The **British Institute of Organ Studies**: http://www.bios.org.uk.
- The **Central Council of Church Bell Ringers** for information about bells and bell frames: https://cccbr.org.uk/. Alternatively, a diocesan bell adviser may also be able to provide advice or a contact.
- The **Church Monuments Society** for information on memorials: https://churchmonumentssociety.org/.
- The **Corpus of Romanesque Sculpture in Britain & Ireland:** https://www.crsbi.ac.uk/.
- The **Corpus Vitrearum Medii Aevi** for expertise on medieval stained glass: http://www.cvma.ac.uk/index.html.

- The **Courtauld Institute of Art Survey of Historic Wall Paintings in the British Isles**: https://courtauld.ac.uk/research/sections/wall-painting-conservation/survey-of-historic-wall-paintings.

- The **Crafts Council** for information about makers and techniques: https://www.craftscouncil.org.uk/.

- The **Furniture History Society**: https://www.furniturehistorysociety.org/ and the **Regional Furniture Society**: https://regionalfurnituresociety.org/.

- The **Goldsmiths' Company:** https://www.thegoldsmiths.co.uk/craft/collections/about-collection/.

- **Lambeth Palace Library:** https://www.lambethpalacelibrary.org/.

- The **Monumental Brass Society**: https://www.mbs-brasses.co.uk/.

- The **Public Statues and Sculpture Association**: https://pssauk.org/.

- The **Silver Society**: http://www.thesilversociety.org/.

- The **Stained Glass Museum** for non-medieval stained glass: https://www.elycathedral.org/visit/stained-glass-museum.

7c   Glossary

Accreditation

The UK industry standard for museums and galleries.

The Care of Cathedrals Measure 2011

The legislation covering the care, conservation, repair and development of cathedrals. It applies to all the Church of England's cathedrals in England except Christ Church in Oxford.

The Care of Cathedrals Rules 2020

Sets out the procedures for operating the Care of Cathedrals Measure.

Catalogue

A collection of records about objects. Records can be part of the inventory or any other object management system such as a library catalogue or an archive.

Cathedral Archaeologist

A qualified archaeologist appointed by the Chapter, after consultation with the Commission, responsible for advising Chapter on all matters for which it has archaeological responsibility.

Cathedral Architect

An architect or surveyor of the fabric appointed by the Chapter, after consultation with the Commission, who has the qualifications and expertise in matters relating to the conservation of historic buildings and other matters appropriate to enable the role and duties of the post of architect or surveyor of the fabric of the cathedral to be discharged.

The Cathedrals Fabric Commission for England

The central national body responsible for giving advice to cathedrals on matters of care, conservation and development; for generally promoting these matters at a national level; and for determining applications for specified categories of proposals.

Chapter

The corporate body of the cathedral, chaired by the Dean, that is responsible for administering the affairs of the cathedral as set out by the Cathedrals Measure 2021.

Collection

A group of objects in the ownership or custody of the cathedral.

Conservation Management Plan

A document that sets out the significance of a place and how this should be preserved and if possible enhanced in any future alteration, repair or management. 'Significance' is the whole set of reasons why people value a cathedral, whether as a place of worship and mission, as an historic building that is part of the national heritage, as a focus for the local community, as a familiar landmark, or for any other reasons.

Fabric Advisory Committee

The independent statutory body attached to each cathedral that is responsible for advising Chapter on matters relating to the care, conservation and development of the cathedral and for determining applications for approval of all categories of proposed works specified in the Measure except those reserved to the Commission.

Object

An item that is not fixed to the fabric of a building. Beyond this, it has been difficult to strictly define an object in terms of cathedral inventories—see section 2 for more information.

Outstanding interest / outstanding item

An inventory item designated by the Fabric Advisory Committee, after consultation with the Commission, as being of outstanding architectural, archaeological, artistic or historic significance.

Quinquennial Inspection

An inspection of the fabric of the building that takes place every five years by a qualified professional (such as an architect or chartered building surveyor).

Record

The entry on the inventory for an individual object or a schedule.

Schedule

A separate part of the inventory listing a discrete collection such as a library catalogue, loans or outstanding items.