



GUIDELINES FOR CONSERVATION REPORTS

A conservation report is an essential tool in the management of cultural property as it can inform the decision-making process and help access funding for conservation. It is a dated record of descriptive information on the state of preservation of an object by a named author.

They are applicable to most church furnishings, such as monuments, timberwork, textiles, wall paintings, paintings on canvas or wood (including hatchments), polychromy, metalwork, church plate, stained glass, and churchyard structures (such as tombs and preaching crosses). The principles behind the guidelines are also appropriate for musical and mechanical furnishings including bells and clocks; separate guidelines for organ builders (agreed with the Institute of British Organ Building) are also available.

Conservation reports are not specifications, and therefore should not be used as tender documents without permission of the author. However, the parish may wish to use them as a basis to produce a tender document. It is important that conservators discuss the possible uses of their reports with their clients and structure them in such a way that they provide all of the required information, whilst ensuring that the commercial process remains fair and transparent (for example, the estimate/specification section should be provided separately).

These guidelines cover the minimum information required for conservation reports accompanying faculty and grant applications.

The role of the conservator

The conservation of the object should be considered in the context of the historic church building and should address preventive conservation measures, as well as treatment. This will almost always include advice on how the condition and use of the building are affecting the object and the steps that should be taken to prevent deterioration. Therefore, the conservator will be expected to liaise with those responsible for the management of the building (usually the PCC) and those professionals involved with the repair and conservation of the fabric (most commonly the inspecting architect and/or surveyor).

In the case of monuments and gravestones, parishes should try to trace the descendants, to seek agreement to the proposals and possibly contributions towards the cost of conservation (although a churchyard is the responsibility of the PCC, the heirs of the deceased have responsibility for the monument).

The purpose and use of conservation reports

Reports must provide a detailed description of the object's condition, analyse the causes of deterioration and explain why it is necessary to embark on a conservation programme. The information in them is used by the parish to demonstrate need for faculty and/or grant applications and consequently these documents must be clear and informative.

Essential information

The following list details the minimum information required in a report.

Summary

The summary details key information found in each section of the report.

Project brief

The brief describes the scope and intention of the report, the conservator who undertook the investigation, the circumstances of examination (including access), the author(s), date of visit(s), and the people responsible for the object and building (including the architect/surveyor).

Description and history of the building

This must include the name of the parish, dedication of church, diocese and county, and listing (if any). It should also include a brief description of the building, including a plan, date(s), construction phase(s) and materials, and major interventions that may be relevant to the object/s.

- Name and date of object
- Location within the church (this should be given on a building plan with context photographs, so that it is clear to the reader where the object is), overall dimensions, and method of installation. Are objects fixed or portable, in their original or another position within the church? Does this have any impact on their interpretation and understanding? If the object is not on permanent display, please describe the nature and conditions of storage and use. For stained glass the conservator is encouraged to use the CVMA system to identify windows.
- General description including original materials, details of construction, surface treatments, inscriptions, and so on. In the case of church plate you should also include details of hallmarks (church plate may come under the protection of The Hallmarking Act (1973) and an Assay Office has to be informed of proposed treatments).
- Physical history of the object, including previous interventions. Ideally, this should be based on existing documentation (for example, through church records or local archives) as well as by visual observation. Original and restored elements should be clearly identified if possible. References to the sources of information used should be given. The Cathedral and Church Buildings Department's library holds files on churches and their contents as well as conservation records of past treatments, and is open to the public (by appointment only). This archive may be especially useful for this section.
- Assessment of the significance associated with the object, such as historical, art historical, social, etc. This significance may be local, regional, national or international. This assessment should be substantiated and referenced; members of the parish may be able to help.

Condition

Condition of the object(s)

This should be recorded photographically and graphically (as appropriate). It is of particular importance that an assessment is made of whether the deterioration is active or inactive (historical). This should be based on the present condition of the object and the history of interventions to both the object and the fabric of the church. State the nature of the examination undertaken (day or artificial light, under magnification, whether a scaffold or ladder was used, etc), and whether any diagnostic investigations, sampling and analysis were carried out.

Condition of the building

Analysis of the building environment with summary of, for example, the type, condition, and use of heating, ventilation, rainwater disposal systems, and how they might impact the object(s). This should incorporate advice from the church's inspecting architect and reference must be made to the recommendations in the latest quinquennial inspection report (available from the parish).

Analysis of the causes of deterioration

Adequate understanding of the causes of deterioration – and how they might be addressed – may require further study by a specialist. Such studies may look at original or added materials in more detail, or assess environmental factors such as heating or maintenance of fabric.

In some cases environmental investigations will have to be carried out over a period of time. Interpretation of specialist advice in relation to the physical history of the object(s), along with recommendations for further investigations, should be provided (if possible).

If the causes of deterioration are related to the maintenance of the building envelope, discuss what measures are being taken by the parish and/or its architect to address them.

Effects of any proposed changes to building management and use

If applicable, examine the anticipated effects of any proposed changes to building management and use, the conservation risks/benefits that this might bring and any mitigation measures which will be necessary. If there are specific risks during the proposed changes (for instance damage risks during building works) make recommendations for approaches to protection.

Recommendations for conservation

Proposals relating to the building, its use and environment

Where relevant, make recommendations for the environmental management of the building as it relates to the conservation of the object(s). Where building works are proposed, an assessment of what interval (if any) should elapse between the completion of works and the start of the proposed conservation. In complex cases this may require a separate and more detailed study to be conducted.

Proposed treatments

Proposed treatment should be justified and prioritised, based on small-scale and discreet treatment trials (with details and photographic documentation). There may be a range of treatments available and a risk assessment may be useful for each option.

If emergency stabilisation work is required, explain why and indicate the extent, timescale, materials and methods proposed. Details should be given as far as possible concerning the materials (with the commercial name of the material as well as its chemical composition), methods proposed, and the rationale for their selection. Indicate if there are any alternatives to the recommendations (type of interventions, materials and methods) and explain why the proposed course is the most suitable.

Future conservation requirements and/or maintenance

Describe what, if any, additional steps should be taken following completion of conservation and indicate the nature and frequency of post-conservation monitoring and/or maintenance. Indicate any significant ethical or practical issues that might be relevant to the case.

Estimate/specification

It is recommended that an estimate for work be provided as a separate document.

Describe what preliminaries and attendance you would require the parish to provide for your work, such as scaffolding, electricity, or availability of professionals such as the architect or builder.

- State the time and cost for carrying out the work, the qualifications, experience and accreditation status of the lead conservator and the insurance cover provided.
- If a phased programme is proposed, show estimates for the phases separately. All on-site costs such as materials, accommodation, and travel should be included.
- Ensure the estimated cost includes the time to produce the post-conservation report. This report should be prepared (following our Guidelines for Post-Conservation Treatment Reports).
- Indicate VAT as a separate item and state terms of payment and duration of validity of the estimate.

Images, references and appendices

Provide a list of all sources of information, including historic photographs.

Full records of sampling, analysis, diagnostic investigations, monitoring, etc, should be appended.

The report must include good quality colour images. The name of the copyright holder should be clearly stated. The report can be provided in PDF or Word format. Images can be provided separately; if so, they should be given relevant names, for example, 'Nave_north_wall_date'.