

# Guidance Note Conservation Management Plans

# ChurchCare



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Parish churches vary greatly in size, complexity and significance, from the smallest chapel to former abbey churches, minster churches and large town churches.

Whatever their scale and complexity, they all have one thing in common; they are local centres of mission and worship, and comprise a unique class of building still in their original use and cared for by their local community.

## Introduction

While guidance for cathedrals on Conservation Plans has existed since 2002, there has been no such specific guidance for parish churches of comparable scale and/or significance, here called **major churches** for ease of reference.

The Church Buildings Council (CBC) has therefore undertaken the production of this advice, following on from its Guidelines on Statements of Significance and Need, produced in 2002 and revised in 2007 and 2012 (download at [www.churchcare.co.uk](http://www.churchcare.co.uk) or ask your DAC).

This was a response to the Faculty Jurisdiction Rules 2000, which stated that parishes intending to submit a faculty application for significant changes to a listed church should prepare such Statements to accompany the application.

It has since become increasingly apparent that major churches are of such complexity and significance that a Statement of Significance and of Need may not be adequate.

Where this is the case, the PCC or other body responsible for a church should consider producing a Conservation Management Plan (CMP).

## What the guidance is for

This guidance has been written to help churches which are either engaged in the CMP process, or are considering whether a CMP is relevant to their needs.

It is intended to be concise and useful, and builds on the premise that there is now a general consensus on the basic format, function and use of a CMP.

Example CMPs prepared by the CBC can be downloaded from [www.churchcare.co.uk](http://www.churchcare.co.uk).

Please see below for the full guidance.

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# Conservation Management Plans

## Guidance for Major Churches

**Church Buildings Council - March 2007, updated August 2016.**



The priory and parish church of St Germanus, St Germans (Diocese of Truro)

Read its Conservation Management Plan at <http://www.churchcare.co.uk>

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# **CONSERVATION MANAGEMENT PLANS - GUIDANCE FOR MAJOR CHURCHES**

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## INTRODUCTION

### 1. Why this guidance was written

Parish churches vary greatly in size, complexity and significance, from the smallest chapel to former abbey churches, minster churches and large town churches. Whatever their scale and complexity, they all have one thing in common; they are local centres of mission and worship, and comprise a unique class of building still in their original use and cared for by their local community. While guidance for cathedrals on Conservation Plans has existed since 2002, there has been no such specific guidance for parish churches of comparable scale and/or significance, here called **major churches** for ease of reference.

The CBC has therefore undertaken the production of this advice, following on from its **Guidelines on Statements of Significance and Need**, produced in 2002 and revised in 2007 and 2012 (download at <http://www.churchcare.co.uk> or ask your DAC). This was a response to the Faculty Jurisdiction Rules 2000, which stated that parishes intending to submit a faculty application for significant changes to a listed church should prepare such Statements to accompany the application. It has since become increasingly apparent that major churches are of such complexity and significance that a Statement of Significance and of Need may not be adequate. Where this is the case, the PCC or other body responsible for a church should consider producing a **Conservation Management Plan (CMP)**.

### 2. What the guidance is for

This guidance has been written to help churches which are either engaged in the CMP process, or are considering whether a CMP is relevant to their needs. It is intended to be concise and useful, and builds on the premise that there is now a general consensus on the basic format, function and use of a CMP. Example CMPs prepared by the CBC can be downloaded from <http://www.churchcare.co.uk>. The CMP will be invaluable for:

- supporting applications to a range of bodies for grants to assist with the care, conservation and development of the church and churchyard, for example from the CBC, English Heritage, and the Heritage Lottery Fund. Such grant applications will often be the catalysts for the compilation of a CMP, indeed the latter may be a prerequisite. The production of the CMP itself may be grant-aided.

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- informing the PCC 's management of the church, helping to ensure that its values and significance are maintained and enhanced and reflected in day-to-day management, and to avoid damaging and potentially expensive mistakes. The CMP, or relevant sections of it, can be cited in support of faculty applications, and in applications where applicable for planning permission, listed building consent, and scheduled monument consent.

## **PART A**

### **MAJOR CHURCHES AND CONSERVATION MANAGEMENT PLANS**

#### **1. DEFINITION OF A “MAJOR CHURCH”**

Most churches which are considered to be “greater” churches were originally parts of monastic institutions or were minster or collegiate churches, as such they are of medieval origin. Many other churches might benefit from a CMP, some of which are of different origin or of later date. The designation of “major church” is used here to encompass this wider group of churches, which nationally may number several hundred. The following characteristics are offered as a definition:

- The major church will normally be of high architectural, art historical and archaeological significance, which will be recognised by its listed status of Grade I or Grade II\*. It will be of high importance to the local community and the general public and will have considerable outreach and resonance beyond the regular worshipping congregation itself, forming effectively the focus of local identity. It will normally be a large building or complex of buildings and have high landscape or townscape value, being a defining visual icon and often a tourist attraction. It will be significant in a number of different ways to a variety of interest groups, which may potentially be a source of conflict.
- Some churches which are not large, prominent or listed Grade I or II\* may nevertheless be considered as major churches for a variety of reasons. Examples are those established within the boundaries of Roman and Anglo-Saxon towns or other sites or on prehistoric sites, which may

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preserve archaeological remains (sometimes the best surviving remains) for these early periods. The church and/or churchyard may be of high ecological significance, or particular social, literary or historical significance, perhaps associated with an extraordinary event, religious or political movement, or personality. These extra levels of significance, complexity and resonance might raise a church into the “major church” category when the church building itself is relatively modest.

- It is possible that more than one church might be encompassed by a CMP, for example in the context of urban regeneration projects. An example of this is the two historic churches in Dudley old town (Diocese of Worcester), which required a common response to the risks and opportunities involved in such major projects. A CMP might therefore be needed as a response to things happening to a church and its context, as well as projects initiated by the church itself.

## 2. HISTORY, DEFINITION AND PURPOSE OF CONSERVATION MANAGEMENT PLANS

The idea of understanding important places and using that understanding to manage them is of course not new. Good management planning has always been essential to many different areas of life. However, the idea of written “Conservation Plans” for historic sites was effectively introduced to England only in the mid 1990s and has developed and changed in the short period since then.

A Conservation Management Plan takes this a step further, whereby the management policies in a CMP are general, rather than being concerned with the minutiae of day-to-day management. This is the model now followed by English Heritage and the Heritage Lottery Fund, which accepts that a CMP written to this guidance fulfils its criteria.

Modern conservation aims to manage change responsibly so that what is valued can be handed on to future generations. It recognises that a major church is a living, evolving place, where stopping all change would be both impractical and inappropriate. Preservation or stopping change, by repairing or deciding not to alter, is only one of several conservation options, appropriate in some circumstances and not in others. A CMP should therefore be a document that sets out the significance of a place and how this should be retained and if possible enhanced in any future use, alteration, repair or management.

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Significance is the whole set of reasons why people value a major church, whether as a place for 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. CMPs are not just about a physical place, but also about recognising the human dimension of caring for and using it. They should be based upon the values and knowledge of people who care for a place, in this case primarily the worshipping community but also community groups who use the building and site, “Friends” societies, as well as other interested parties.

To sum up, a CMP is a tool for recognising and reconciling tensions that may arise between the necessary life of the worshipping community and the significance of the place, and to help the church and its community to transcend these and develop and grow.

The CMP should therefore help the PCC and all others concerned with the church to:

- **Understand the church building and site and its use by the community** by drawing together information including documents and physical evidence in order to present an overall description of the place through time. This includes a brief description of the church and site today, how it is used and perceived, and identifies areas for further research.
- **Assess its significance** both generally and for its principal components, on a local, national and international level.
- **Define potential and constraints** by identifying issues affecting the significance of the site and building remains, or which have the potential to affect them in the future.
- **Develop management policies** to ensure that the significance of the church and site is retained in any future management, use or alteration. If possible this significance should be enhanced through implementation of these policies.

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## PART B

### *THE CONTENTS OF A MAJOR CHURCH CONSERVATION MANAGEMENT PLAN*

Part A of this document has provided advice on the **context** for conservation planning at major churches. Part B now deals in detail with the **contents** of a Major Church Conservation Management Plan.

A CMP should be a straightforward document and its compilation achievable within a reasonable budget and time span. It should not be a major piece of original scholarly research, but should rather attempt to synthesise the available information in the context of current knowledge and best practice.

The CMP must be clear, accurate, well illustrated, well sign-posted and intelligible if it is to meet its purposes. It should be a readable and accessible document, not just a series of tables and lists. Detailed information, scholarly debate &c can be put into appendices. Every effort should be made to make the main body of the CMP as concise as possible, and a length of 10,000-30,000 (copiously illustrated) words is suggested. The following breakdown is offered as a rough guide to the relative proportions of the main components of a CMP for a major church:

- Preliminaries and Introduction: 5%
- Understanding the place and community: 40-60%
- Assessment of significance: 10-20%
- Defining potential and constraints: 10-20%
- Conservation and management policies: 10%
- Sources: 5%
- Appendices: depending on available material.

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The following gives more detail as to what these headings should contain. It is meant as an easy to follow guide, but it may not be suitable for every church and site, in which case the detail may be varied. However, the basic structure outlined above is the recognised format for these documents and has proved its worth, and should be adhered to.

## 1. PRELIMINARIES

### List of Contents and Illustrations

**Message from PCC:** A statement that the PCC or other responsible body has formally adopted the CMP and is committed to using it. A short message from the PCC regarding their vision for the future of their church and how the CMP relates to this should be included.

**Executive Summary:** A short summary of key points in the CMP, which should ideally not be longer than two or three paragraphs.

## 2. INTRODUCTION

Explains who has written the CMP, when, why and for what purpose. It notes the status of the CMP and its relationship to other key documents, such as Statements of Significance and Need, the Log Book, Inventory and the Quinquennial Inspection reports. It outlines the process by which the plan has been compiled, including a summary of consultees and participants, and a summary of the main sources, cross referenced to the bibliography and appendices as appropriate.

## 3. UNDERSTANDING THE PLACE AND COMMUNITY

This section provides the basic information needed for the discussion of values and significance which follows. It includes:

### The location and setting of the church

A brief summary which sets the church within its spatial, environmental, social, archaeological and historical context, serving as an introduction to what follows.

### The church and the community

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Explains the primary mission and role of the church, and the various activities which take place within it, including mission and worship, community uses, outreach, education, music, maintenance, visitors and visitor management. This information focuses on how people interact, and interacted in the past, with the church; the human dimension of the place.

### Description of the building(s) and site

This can be divided into two parts:

- **The history and archaeology of the building(s) and site:** this is an overview of the broad phases of change affecting the place, including its immediate environment, from the earliest archaeological remains and/or historical records through to the present, including previous use of the site and the various rebuilding and restoration campaigns which have affected the church and site. It will include a brief timeline as an introduction, with photographs, maps, prints and paintings judiciously used to illustrate this development. In many cases it may be felt appropriate to confine most of the detail to one or more appendices, offering a very brief summary within the CMP itself.
- **The Church and Site today:** a concise description of the entire major church complex as it can be seen today, covering the church, the churchyard, and associated structures and monuments, illustrated with photographs, maps, and plans. It includes an overview of the major church's fixtures and fittings, collections and library if present. It is important not to lose one's way in the detail. Where there is a large amount of detailed information, this will be summarised in appendices, and/or reference can be made to other documents.

## 4. ASSESSMENT OF SIGNIFICANCE

An understanding of significance is the whole basis of the process, and should influence everything else. This means that practical decisions take as their starting point the values of the place. In a major church there are likely to be real conflicts between different values or types of significance; part of the skill of managing a major church lies in reconciling such conflicts. The more explicitly values are articulated, the easier it is to recognise – and reconcile – potential conflicts.

The first step involves articulating the various levels of significance of the church and churchyard. Significance is essentially a hierarchical concept, using ascending levels of value. These follow guidelines established by James Kerr (*The Conservation Plan*, 1996 and 2000 editions) and adopted by the Heritage Lottery Fund, English Heritage and others. The levels of significance are:

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- **Exceptional** – important at national to international levels.
- **Considerable** – important at regional level or sometimes higher.
- **Some** - of regional significance for group or other value (eg a vernacular architectural feature).
- **Local** - of local value.
- **Negative** or **intrusive** features, ie those which actually detract from the value of a site, for example a concrete boiler house adjacent to a medieval church.

A lower designation of significance does not imply that a feature is expendable. Furthermore there are many instances where parts or aspects of the place may be susceptible to enhancement or reduction of significance as currently perceived, especially where there is a lack of information or understanding at the moment. The Assessment of Significance can then be organised in the following way:

- **A summary of the formal designations** (Listed Historic Buildings, Scheduled Ancient Monuments, Conservation Area, Site of Special Scientific Interest, Tree Preservation Orders, &c; these designations are currently in the process of review), and what these designations indicate about significance;
- **A detailed breakdown of what is of significance**, on either a spatial, typological or chronological basis (or a combination of these), relating significance to the physical reality of fabric, contents, landscape, archaeology &c in a systematic way. This will include the significance of such things as liturgical use and developments, musical tradition, community and amenity value, &c.

## 5. ASSESSMENT OF POTENTIAL AND CONSTRAINTS

There may be factors and issues which need addressing which affect, or have the potential to affect, the significance articulated in the previous section. Examples might be radical reordering proposals, new regulations on access for people with disabilities, or on energy conservation. Furthermore, a lack of resources (or the allocation of resources) may be affecting some of the ways in which the place is significant. This section sets out a consideration of all the issues impacting, adversely or otherwise, on what has been established (in the previous section) as being significant about the major church. It includes:

- **Issues affecting the church, its context and contents:** this is an analysis of those specific ways in which the significance of the place is vulnerable, identifying issues that are current now, that have had an impact in the past, and that are likely to have an impact in the future. These might

include structural problems, lack of resources, patterns of worship, or new legal requirements. It will also explore where there might be potential for enhancing the church and its significance.

- **An exploration of potential areas of conflict:** these are likely to arise from perceived conflicts of values. This might arise, for example, from a desire to create flexible space within the church, or to enhance the significance of the musical tradition by installing new organs or moving or extending older ones which clash with the significance of the existing instruments themselves, or with an affected area of historic fabric, floor or important sight line. The requirements of recent legislation and policy regarding environmental sustainability and access for the disabled in particular may clash with aesthetic and heritage issues.
- **Impact assessment:** this is something that most decision-makers do implicitly when considering significant changes arising from these considerations. In making a decision – for example about the location of new visitor facilities or the installation of new services – they will ask ‘what will be the impact of the work on the special interest of the place as a whole, and of that particular part of it affected?’ The benefit of articulating this in the CMP is that others can share and appreciate your thinking, which helps inform the process. This section will be amongst the most frequently updated parts of the CMP.

## 6. FORMULATION OF MANAGEMENT POLICIES

This section sets out the policies that have, during the process of preparing the CMP, been identified as necessary for retaining and enhancing the significance of the major church taking the constraints into account. These policies will have been fully evaluated with those responsible for the management of the church.

Policies should be both general to the place as a whole, and also specific to particular areas. There may be general (not day-to-day) policies on, for example, use, maintenance, repair, access, new services, health and safety, community consultation, planning, archaeology, ecology, new work or visitor management. There may also be specific guidelines relating to how the value of particular parts or aspects should be retained or enhanced. If such are not in place, specific policies should be to establish a Disaster Management Plan, a Disability Audit, and Sustainable Management policies, taking advice from the DAC and from the Churchcare web site.

The first and perhaps most important policy should be to create a mechanism for a Review Procedure of the CMP itself. Our knowledge of places like major churches is constantly increasing. The CMP will provide a framework for managing information, to which new information can be added as it arises. An obvious solution is to bed the Review Procedure into the Quinquennial Review process, to

ensure that the document continuously evolves and remains accurate and useful, but the CMP should also be reviewed after every significant change, repair, or study. This can make the difference between a useful document and one consigned to gather dust on the bookshelf.

## **7. SOURCES**

This will provide details of the main texts, collections and institutions where the relevant information and material referred to or supporting the CMP can be found.

## **8. APPENDICES**

Some major churches will be of such scale and complexity that a mass of information may exist which can only be summarised in the CMP. There may for example be a report by NADFAS (held at Church House) on the furnishings and fittings, or by the RCHME or other institution, or the church may possess detailed fabric records. Architect's plans and other information on many churches can be found in an archive compiled by the ICBS, now held by Lambeth Palace Library and accessible at <http://www.churchplansonline.org>. The CBC may also have useful archive material in its library at Church House.

In order to keep the CMP a reasonable length and a concise and useful document, this mass of detailed information may be organised in appendices, to which the CMP makes reference, or it may be felt appropriate to simply give references in the sources section to this material rather than append it to the CMP as an appendix. Scholarly discussions about various aspects and suggested areas for future research may also be placed in appendices. In these ways, it should be possible to avoid the CMP expanding and becoming unmanageable, expensive and potentially unusable.

## PART C

### THE PROCESS FOR A MAJOR CHURCH CONSERVATION MANAGEMENT PLAN

The following is a stage-by-stage guide for a PCC or others responsible for a church on how to make a Conservation Management Plan happen, and some practical guidance on the sorts of issues that may arise.

#### 1. *GETTING STARTED*

##### **Identify Possible Partners**

At the outset of the process the PCC, in consultation with its DAC and the CBC, should consider possible partnerships in compiling a CMP. The PCC should consult with other major stakeholders, interested parties, and sources of help, information and advice, which will include your architect, the DAC, the CBC, local planning authority staff (conservation officer), neighbouring landowners or stakeholders, statutory bodies (English Heritage, Natural England, etc), the national Amenity Societies, community groups, conservation area advisory committees, local societies, and specialist groups or individuals.

#### 2. *MAKING THINGS HAPPEN*

Once the PCC has taken a decision to proceed with a CMP, it should appoint:

- A **Project Manager**, preferably from within its own membership, to take responsibility for managing the process and ensuring that the timetable and budget are adhered to. This may be the Treasurer, but need not necessarily be.
- A **Steering Group**. The Steering Group should comprise members of the PCC and the agreed representatives of the partners and interested parties identified under the process described in 1

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above. The role of this group is to draw up a short list of possible candidates for the role of Facilitator, to help define the scope of the CMP, to give advice and support to the Facilitator, and to validate the whole process. The Project Manager and Steering Group should co-operate to produce a short and concise Brief which defines the scope, parameters and cost of the CMP, and to monitor and validate the process of its production. The Brief should contain milestones at which progress can be monitored and reviewed by the Project Manager and Steering Group.

- **A Facilitator.** The Steering Group should present the short list for the role of to the PCC and recommend a candidate or candidates for its approval. The Facilitator may be a single person or a practice. An enterprise such as this is likely to require a team but, if possible, all the information should go through one person, if for no other reason than to create a coherent narrative or story. No one profession is best suited to the preparation of a CMP on a major church, what is important are particular qualities. These include a background in one of the conservation professions, an understanding of the legislative and planning framework, an ability to read and understand historic fabric and the archaeological significance of the church and site, the furnishings and fittings and their liturgical use, and perhaps above all an ability to write and present complex information clearly and concisely.

### **3. COMMISSIONING AND COMPILATION OF THE CMP**

A CMP should not be a purely academic exercise, undertaken by an individual or group in isolation, and the PCC should actively contribute to it, not just sign it off at the end. The process requires participation and consultation, and the PCC should keep close control of the process, both in terms of time and money through the agency of the Project Manager, and in terms of content, quality and impartiality through the agency of the Steering Group. The CMP is likely to go through several drafts before it is ready for adoption by the PCC.

The CMP must be a public document, and a wide range of bodies and individuals should be consulted (identified under 1 above) after it has been adopted by the PCC, not only to “pick their brains” but also to ensure widespread acceptance of the validity of the document. Once completed, the CMP should be regularly reviewed, updated and edited.

### **4. DISTRIBUTION AND ARCHIVING OF THE CMP**

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It is important that the completed CMP is an accessible public document either in published form, or on CD ROM (one should note that this is not a suitable archive medium), or on the Web. In the first instance multiple paper copies of the CMP should be produced and distributed to all the key partners. These should also be produced after every significant change made to the CMP, for example following a major reordering scheme.

The location and status of the archive should be considered. A parish church will generally not have the facilities to archive original material. There may be particular issues concerned with the storage of CAD images and other digital data, for example. This should be carefully considered, and advice taken from the Steering Group.

Security may be an issue and should be carefully considered. It would be incompatible with the aim of the CMP being a publicly available document if any part of the main document contained material that the PCC regarded as confidential. Any strictly confidential material, e.g. relating to commercial or security matters, should be in a separate appendix.

The issue of copyright should also be carefully considered. Appropriate advice should be sought on the wording of any agreement. Where the CMP makes use of research, drawings and photographs the copyright in which vests in third parties, it should be the responsibility of the Facilitator to obtain permission for the appropriate use of such material.

## FURTHER READING

Model Major Church Conservation Management Plans produced by the CBC. Free download available at <http://www.churchcare.co.uk/>

Church Buildings Council: *Guidelines on Statements of Significance and Need* (CBC 2002, revised 2007, 2009, 2012), available free from DACs or CBC or download from <http://www.churchcare.co.uk/>

B.M. Feilden & J. Jokilehto, *Management Guidelines for World Cultural Heritage Sites* (ICCROM, Rome, 1993).

J.S. Kerr, *The Conservation Plan: a guide to the preparation of Conservation Plans for places of European cultural significance* (National Trust of Australia, 5<sup>th</sup> ed., Sidney, 2000).

Heritage Lottery Fund, *Conservation Management Plans: a Guide* (London 2002), which can be downloaded from the HLF web site:  
<http://www.hlf.org.uk/English/PublicationsAndInfo/AccessingPublications/GuidanceNotes.htm>

K. Clark (ed.), *Conservation Plans in Action: Proceedings of the Oxford Conference* (English Heritage, 1999).

K. Clark, *Informed Conservation* (English Heritage, 2001).

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