



ENGLISH HERITAGE

Collections Development Policy

Name of Museum: English Heritage

Name of Governing Body: The English Heritage Trust

Date on which this Policy was approved by governing body: 21 June 2022

Recitals and Policy review procedure:

Under the terms of the Property Licence and Operating Agreement between Historic England (Historic Buildings and Monuments Commission for England: “the Commission”) and English Heritage (PLOA: section 14), English Heritage:

- May acquire by any means any historic chattel that relates to the history of any of the Historic Properties (as defined in the PLOA) or otherwise might contribute to the knowledge and enjoyment of them, provided it offers the same to Historic England free of charge. If Historic England refuses the transfer, English Heritage is under no further obligation to Historic England in relation to that chattel; and
- May request that Historic England disposes of a historic chattel if it does not relate to the history of any of the Historic Properties or otherwise contribute to the knowledge and enjoyment of them. Consent to any such disposal is in the absolute discretion of the Commission.

English Heritage has implemented this Policy in order, in part, to set out the processes by which the above PLOA provisions are effected. The General Counsel and Corporate Secretary of the Commission has been consulted on those parts of this Policy which concern engagement with the Commission (sections 10.1 to 10.4, 17 and 18).

The Collections Development Policy is owned by the Head Collections Curator. It will be published and reviewed at least once every five years as part of a cyclical process managed by the English Heritage Senior Registrar.

Date at which this policy is due for review: 2027

Arts Council England will be notified of any changes to the Collections Development Policy, and the implications of any such changes for the future of the collections.

1. Management Arrangements

- 1.1. The permanent collections are owned by, or in the guardianship of, the Commission, either directly or on behalf of the Secretary of State. The English Heritage Trust (henceforth English Heritage) manages the collections on behalf of Commission.
- 1.2. The Management arrangements are set out in the PLOA for the National Heritage

Collection, in particular sections 11, 14 and 15 and schedules 4B and 9.

2. Relationships to other relevant policies/plans of the organisation

- 2.1. English Heritage's statement of purpose is: To conserve the National Heritage Collection of over 400 unique sites, monuments and artefacts, in keeping with their status as part of England's national heritage. To bring history to life in the places where it happened by opening up the sites and monuments to public access, through exhibitions, events and educational programmes, supported by our online content.¹
- 2.2. English Heritage will ensure that both acquisition and disposal are carried out openly and with transparency.
- 2.3. By definition, English Heritage has a long term purpose and holds collections in trust for the benefit of the public in relation to its stated objectives. The governing body therefore accepts the principle that sound curatorial reasons must be established before consideration is given to any acquisition to the collection or the disposal of any items in English Heritage's collection.
- 2.4. Acquisitions outside this policy will only be made in exceptional circumstances.
- 2.5. English Heritage recognises its responsibility, when acquiring additions to its collections, to ensure that care of collections, documentation arrangements, and use of collections will meet the requirements of the Museums Association Standard. This includes using SPECTRUM primary procedures for collections management. It will take into account limitations on collecting imposed by such factors as staffing, storage and care of collections arrangements.
- 2.6. English Heritage will undertake due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the governing body or responsible officer is satisfied that English Heritage can acquire a valid title to the item in question.
- 2.7. English Heritage will not undertake disposal motivated principally by financial reasons.
- 2.8. More detailed Collections Development Statements may be developed for individual properties; they will include the terms of this policy by reference to this document. Provided that no part of a property-specific Collections Development Statement falls outside of this policy it may be approved by the Acquisitions, Disposals and Loans Committee under its terms of reference.

3. History of the Collections

- 3.1. The object collections have been brought together over a period of 125 years. For an overview of this process see Appendix One.

4. An overview of the collections

- 4.1. The collections managed by English Heritage total over 850,000 objects. They range from prehistoric finds to pieces of contemporary art. The majority of the collections are associated in some way with the properties in the care of English Heritage or with a property formerly in the care of English Heritage or a predecessor organisation.
- 4.2. Around 69% of the collections are archaeological in nature, a further 17% is books or

¹ *Strategic Plan 2022–2025: Sharing our past, shaping our future*, page 8.

archives with 10% being social or industrial history, 3% decorative arts, 0.5% natural history, 0.4% fine art and 0.1% ethnography. Around 13% of the objects in the collection are currently on display. While small in number the fine art collections comprise some of the most significant and valuable objects. In addition to the accessioned collections English Heritage occasionally acquires historic objects for use as props within specific sites; these items are not accessioned into the permanent collections and their use is governed by a separate policy document.

- 4.3. In broad terms the collections comprise:
 - 4.3.1. Archaeological archives from excavations and other interventions on English Heritage properties;
 - 4.3.2. Architectural material removed during clearance work, consolidation, repair or maintenance at English Heritage properties;
 - 4.3.3. Historic contents, including art, furniture, books, social history, natural history and arms, associated with English Heritage properties;
 - 4.3.4. Historic material similar to that which would have been present at an English Heritage property;
 - 4.3.5. Fine art and furniture acquired for display at specific English Heritage properties (including the Iveagh Bequest and the Suffolk Collection);
 - 4.3.6. Contemporary art acquired or commissioned for display at specific English Heritage properties;
 - 4.3.7. Material relating to the history of the display and maintenance of English Heritage properties;
 - 4.3.8. Archive material relating to owners, occupiers and workers at English Heritage properties;
 - 4.3.9. Oral history relating to the use of English Heritage properties by owners, occupiers, workers and visitors.
- 4.4. As well as these English Heritage also manages a number of collections that are not related to the properties.
 - 4.4.1. The Architectural Study Collection;
 - 4.4.2. A collection of architectural material salvaged from Great Yarmouth;
 - 4.4.3. The Wernher Collection of decorative art; collected by Julius Wernher. This collection is on long term loan to English Heritage from the Wernher Trustees. Due to the specific nature of the loan agreement this policy does not apply to the Wernher Collection;
- 4.5. English Heritage is responsible for a number of sites that contain historic working machinery; these include J.W. Evans, Stott Park Bobbin Mill and Sibsey Trader Windmill. In addition to this English Heritage manages, and occasionally operates, several firearms and musical instruments which are accessioned as objects within the permanent collection. English Heritage acknowledges that there can be benefits derived from operating historic machinery and equipment including increased public engagement and regular maintenance but also that operating historic machinery and equipment can pose a risk to the objects themselves through wear and tear, accident and breakage.
- 4.6. The decision to operate historic machinery or equipment will be taken on a case by case basis and with full consultation with curators, conservators and external specialists where appropriate. The benefits to the public in terms of engagement will always be

weighed against any potential risks both to the operator and to the item in question. Where the decision has been taken to operate a piece of historic machinery or equipment it will be done so in line with all necessary legislative requirements relative to that item. All legislative requirements will be fully documented and the relevant documentation lodged with Registry.

5. Themes and priorities for future collecting

5.1. Objects will be acquired by English Heritage for display at specific properties and added to the permanent collections with the agreement of Commission following the priorities stated below.

- 5.1.1. Priority is given to the acquisition of objects that are historically linked by provenance or subject matter with an English Heritage property. Objects commissioned for a site take precedence over objects which simply have an early association with a property. In line with English Heritage's Equality, Diversity and Inclusion Strategy, objects which relate to a social or ethnic group that has been previously under represented will be particularly welcome.
- 5.1.2. Architectural and archaeological material which has become detached from an English Heritage site will be added to the collection where it has research value or will assist in the future management of the property.
- 5.1.3. Archaeological material deriving from fully-documented excavations on an English Heritage site or property, together with the rest of the archaeological archive, will be added to the collection after the completion of the agreed selection procedures. However, where another Accredited museum already holds the bulk of material from the site in question the archaeological archives will normally be deposited with that body.
- 5.1.4. Collections of archaeological material from English Heritage sites or properties may be accepted from other collecting institutions, or private collectors, in particular where English Heritage already holds the majority of the archaeological record from that location.
- 5.1.5. Works of art, furniture and objects which are close equivalents to, and/or complement, objects already on display at a property at the chosen display period which assist in the interpretation or understanding of the property.
- 5.1.6. Works of contemporary art and illustrative material (eg. local views, portraits of residents, early guide books) which relate directly to and will assist in the interpretation or understanding of a property.
- 5.1.7. Oral history recordings of former owners, occupiers, staff and others who have an association with English Heritage properties and objects.
- 5.1.8. Where English Heritage and Commission agree to acquire a monument or historic building for the National Heritage Collection they will normally seek to acquire, at the same time, any associated historic artefacts which are displayed or stored, on, in or in association with the site.
- 5.1.9. Objects relating to the history and work of English Heritage and its predecessors in relation to the conservation of properties in the National Heritage Collection may be acquired. Except in exceptional circumstances objects in this category will only be acquired by transfer from other departments of English Heritage or

Historic England.

- 5.2. This general acquisitions policy will be supplemented by more specific Collections Development Statements at individual properties or for individual collections. These statements will be approved by the Acquisition, Disposals and Loans Committee on behalf of English Heritage.
6. Themes and priorities for rationalisation and disposal (see Section 17 for process)
 - 6.1. English Heritage recognises that the principles on which priorities for rationalisation and disposal determined will be through a formal review process that identifies which collections are included and excluded from the review. The outcome of a review and any subsequent rationalisation will not reduce the quality or significance of the collection and will result in a more useable, better managed collection.
 - 6.2. The procedures used will meet professional standards. The process will be documented, open and transparent. There will be clear communication with key stakeholders about the outcomes of the process.
 - 6.3. Architectural elements may be disposed of from the permanent collections where they are to be reinstated in the building or monument from which they originate.
 - 6.4. Disposals may be undertaken for legal, safety or care and conservation reasons (for example, spoliation, radiation, infestation or repatriation).
 - 6.5. Disposals of archaeological material may be undertaken where it is ascertained that they are from a site not currently in the care of English Heritage and another Accredited museum is a more suitable repository.
 - 6.6. Where the Commission and English Heritage agree the transfer of management of a property currently included in the National Heritage Collection to a third party they will ensure that appropriate arrangements are made for the long term future of any objects in the permanent collection which are linked to that property. If the third party is an Accredited museum, then the arrangements may include transfer of the ownership of the objects.
 - 6.7. It is recognised that historically items were often accessioned into the collections without assessment of their significance. Items may be disposed of after a review of the collection has taken place. A review may encompass all of the collections from a property, or all of the collections from an excavation campaign, or all the collections of a particular type from a property. The Collections Development Statements for individual properties will identify the reviews planned during the period of their validity. Collections reviews will be conducted in line with Museums Association guidance and with specific reference to the Disposals Toolkit.
 - 6.8. Unaccessioned items which fall within the definition of 'historic chattels' as outlined in the PLOA may be disposed of without the approval of the Acquisitions, Disposals and Loans Committee, provided that they are not appropriate for accessioning under this policy.
 - 6.9. This general disposals policy will be supplemented by more specific Collections Development Statements for individual properties and collections. Statements for individual properties or collections will be approved by the Acquisitions, Disposals and Loans Committee on behalf of the Trustees.

7. Legal and ethical framework for acquisition and disposal of items

7.1. English Heritage recognises its responsibility to work within the parameters of the Museums Association Code of Ethics when considering acquisition and disposal.

8. Collecting policies of other museums

8.1. English Heritage will take account of the collecting policies of other museums and other organisations collecting in the same or related subject areas or fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism in order to avoid unnecessary duplication and waste of resources.

8.2. Specific reference is made to the following museums and organisations:

8.2.1. The British Museum- with reference to archaeology;

8.2.2. The Tate Gallery and the National Gallery- with reference to paintings;

8.2.3. The Victoria and Albert Museum- with reference to furniture, furnishing and decorative arts;

8.2.4. Local archaeology and history museums, and archive repositories whose collecting areas include English Heritage sites and monuments;

8.2.5. The Royal Collection- with reference to Osborne House;

8.2.6. The Royal Armouries- with reference to arms and armour;

8.2.7. The National Trust- with reference to properties owned or managed by them;

8.2.8. The Historic England Archives- with reference to archive material.

8.3. Property specific Collections Development Statements will contain more detailed information on local museums and organisations.

9. Archival Holdings

9.1. English Heritage holds and acquires archaeological archives from archaeological interventions on its sites which include both artefacts and documentary archives. It will manage these in accordance with best practice for the management of archaeological archives.

9.2. English Heritage holds and acquires archive material relating to objects in its collections and owners and collectors of objects and sites in its collections. However it does not have the facilities to manage and provide access to large family and estate archives. It will work with local and national archive repositories to ensure that archive materials are deposited with the most appropriate institution.

10. Acquisition

10.1 Policy for Agreeing Acquisitions

10.1.1 Commission has delegated authority to English Heritage to acquire objects for the National Heritage Collection in line with this policy.

10.1.2. Acquisitions which fall within this policy will be approved by the Acquisitions, Disposals and Loans Committee on behalf of the English Heritage Trustees, under its approved terms of reference. Acquisitions of an item or group of items which fall outside this policy or with a total estimated value of £1 million or more will be approved by the English Heritage Board of Trustees.

10.1.3 The Acquisitions, Disposals and Loans Committee will report annually in writing to English Heritage Trustees and its Minutes are available to English Heritage

Trustees on request. In addition, the Committee will report to the next English Heritage Board meeting on any acquisition or disposal of any item or group of items with a total estimated value of £50,000 or more.

- 10.1.4 For any acquisition for accession into the permanent collections of an item or group of items with an estimated value of over £50,000, English Heritage will provide a list to the Commission (via its General Counsel and Corporate Secretary) in December of each year so that the Commission may include these in its asset register.
- 10.1.5 The approval of the Commission (via its General Counsel and Corporate Secretary of Commission will be required for the acquisition of material for accession into the permanent collections for any item or group of items with an estimated value of over £50,000 or any item that falls outside the themes and priorities outlined in section 5. 10.2.3. Financial approval for purchases is also required in accordance with the appropriate financial protocols.

10.2 Transfer of Ownership

- 10.2.1 English Heritage is obliged to offer to transfer ownership of all newly acquired objects to Commission as outlined in section 14.1 of the PLOA.
- 10.2.2 Where a donor is asked to sign a transfer of title document that document will transfer title to Commission.
- 10.2.3 For acquisitions for which the donor is not asked to sign a transfer of title document, and subject to section 10.3.4 below, the transfer shall take place annually on or shortly after, 31 December each year with the exact date agreed between English Heritage and Commission in December.
- 10.2.4 The transfer under section 10.3.3 will take the form of a list of all newly acquired items listed by acquisition number, to be provided by English Heritage on or shortly after 31 December each year with the exact date agreed between English Heritage and Commission in December. Any items with an estimated value of over £10,000 that are acquired (or disposed of) during the year will be specifically flagged up in the annual transfer so that they can be capitalized. For any items with an estimated value of £1m or more Commission has discretion to determine when the formal transfer takes place. Generally, the transfer will take place immediately but if the items are acquired close to year end (31 March) then the formal transfer may be held over until the next financial year at the discretion of Commission.
- 10.2.5 The English Heritage Senior Registrar will ensure that the transfer takes place and will provide the information outlined above to the General Counsel and Corporate Secretary of Commission.

10.3 Acquisition through Acceptance in Lieu or Cultural Gifts Schemes

- 10.3.1 Where items are offered to English Heritage through either the Acceptance in Lieu or Cultural Gifts schemes these will be notified to Commission via the General Counsel and Corporate Secretary at the earliest opportunity. Items that come through either of these schemes will not be subject to the 'annual transfer' but will pass straight into the ownership of Commission.
- 10.3.2 Items will be assessed against the criteria outlined in section 5 of this policy and a paper presented to the Acquisitions, Disposals and Loan Committee making recommendation regarding acceptance.
- 10.3.3 If the items are accepted at the Acquisitions, Disposals and Loan Committee and have an estimated value of less than £50,000 then the General Counsel and Corporate Secretary of Commission will sign the relevant deeds of transfer.
- 10.3.4 If the Acquisitions, Disposals and Loan Committee decides in principle to accept items with an estimated value of £50,000 or more, the Committee will make a recommendation to Commission's Executive Board (via the General Counsel and Corporate Secretary) to that effect. Commission's Executive Board shall decide whether to accept such items and, if accepted, the General Counsel and Corporate Secretary of Commission will sign the relevant deeds of transfer.

10.4 Other Provisions relating to Acquisitions

- 10.4.1 English Heritage will not acquire any object or specimen unless it is satisfied that the object or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country's laws. For the purposes of this paragraph 'country of origin' includes the United Kingdom.
- 10.4.2 In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from 1 November 2002, and the Dealing in Cultural Objects (Offences) Act 2003, English Heritage will reject any items that have been illicitly traded. The Governing body will be guided by the national guidance on the responsible acquisition of cultural property issued by the Department for Culture, Media and Sport (DCMS) in 2005.

11. Human remains

- 11.1. As English Heritage holds and intends to acquire human remains over 100 years old, it will follow the procedures in the Guidance for the care of human remains in museums issued by DCMS in 2005 and English Heritage's policy on the management of human remains.

12. Biological and geological material

- 12.1. So far as biological and geological material is concerned English Heritage will not acquire by any direct or indirect means any specimen that has been collected, sold or otherwise transferred in contravention of any national or international wildlife protection or

natural history convention, law or treaty of the United Kingdom or any other country, except with the express consent of an appropriate outside authority.

13. Archaeological material

13.1. English Heritage will not acquire any archaeological material (including excavated ceramics) in any case where the where the governing body or responsible officer has any suspicion that the circumstances of their recovery involved a failure to follow the appropriate legal procedures.

13.2. In England the procedures include reporting finds to the landowner or occupier of the land and to the proper authorities in the case of possible treasure (ie. the Coroner for Treasure) as set out in the Treasure Act 1996 (as amended by the Coroners & Justices Act 2009).

14. Exceptions

14.1. Any exceptions to the above clauses will only be because English Heritage is:

14.1.1. Acting as an externally approved repository of last resort for material of local (UK) origin;

14.1.2. Acting with the permission of authorities with the requisite jurisdiction in the country of origin;

14.2. In these cases English Heritage will be open and transparent in the way it makes decisions and will act only with the express consent of an appropriate outside authority. English Heritage will document when these exceptions occur.

15. Spoliation

15.1. English Heritage will use the statement of principles Spoliation of Works of Arts during the Nazi, Holocaust and World War Two period, issued for non-national museums in 1999 by the then Museums and Galleries Commission.

16. The repatriation and restitution of objects and human remains

16.1. The governing body, acting on the advice of English Heritage's professional staff, may take a decision to return human remains (unless covered by the Guidance for the care of human remains in museums issued by DCMS in 2005), objects or specimens to a country or people of origin. English Heritage will take such decisions on a case by case basis; within its legal position and taking into account all ethical implications and available guidance. This will mean that the procedures described in sections 16.1 – 16.6 will be followed but the remaining procedure may not be appropriate.

16.2. The disposal of human remains in England, Northern Ireland and Wales will follow the procedures in the Guidance for the care of human remains in museums.

17. Disposal procedures

17.1. Disposals falling within this policy will require prior approval of the Acquisitions, Disposals and Loans Committee on behalf of the English Heritage Trustees under its approved terms of reference and of the Commission (via the General Counsel and Corporate Secretary), except as provided in section 17.2.

- 17.2 Subject to section 17.3, All disposals must be reported to the Acquisitions, Disposals and Loans Committee and to the Commission. However, prior approval is not required from either the Committee or the Commission in the following circumstances:
- 17.2.1. Where disposal is required because an item poses an immediate health and safety risk;
 - 17.2.2. Where disposal is required because an item presents an immediate risk to the safety or preservation of other objects;
 - 17.2.3 Where retention of an object is in contravention of the law;
 - 17.2.4 Where an object has been accidentally destroyed.
 - 17.2.5 Where an object has deteriorated to the point where it has lost its historical value.
- 17.3. Disposals falling outside this policy, or that fall within the exceptions outlined in 17.2 but that are considered novel and/or contentious, will require the approval of English Heritage Trustees and the Commission (via the General Counsel and Corporate Secretary).
- 17.4. All disposals will be undertaken with reference to the SPECTRUM primary Procedures on disposal.
- 17.5. English Heritage Trustees, via the Acquisition, Disposal and Loans Committee, will confirm that it is legally free to dispose of an item including specific considerations relating to individual gifts or bequests. Disposal agreements made with donors will also be taken into account.
- 17.6. When disposal of a museum object is being considered, English Heritage will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.
- 17.7. When disposal is motivated by curatorial reasons the procedures outlined below will be followed and the method of disposal may be by gift, sale, reinstatement or as a last resort destruction.
- 17.8. The decision to dispose of material from the collections will be taken by the Acquisition, Disposals and Loans Committee only after full consideration of the reasons for disposal. Other factors including public benefit, the implications for English Heritage's wider collections and those held by museums and other organisations collecting similar material or in related fields will be considered. Expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by English Heritage will also be sought.
- 17.9. A decision to dispose of a specimen or object, whether by gift, sale, reinstatement or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the responsibility of the Acquisitions, Disposals and Loans Committee, acting on behalf of the Trustees and on the advice of professional curatorial staff and not of the curator or manager of the collection acting alone.
- 17.10. Once a decision to dispose of material in the collection has been taken, priority will be

given to retaining it in the public domain. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited museums likely to be interested in its acquisition.

- 17.11. If the material is not acquired by any Accredited museum to which it was offered as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material normally through a notice on the Museum Association's Find an Object web listing service, an announcement in the Museums Association Museums Journal or in other specialist publications and websites where appropriate.
- 17.12. The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited museums. A period of at least two months will be allowed for interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, English Heritage may consider disposing of the material to other interested individuals and organisations giving priority to organisations within the public domain.
- 17.13. Any monies received by English Heritage Trustees from the disposal of items will be applied solely and directly for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from Arts Council England.
- 17.14. The proceeds of a sale will be allocated so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard. Money must be restricted to the long-term sustainability, use and development of the collections.
- 17.15. Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with SPECTRUM procedure on de-accession and disposal.

Disposal by exchange

- 17.16. English Heritage will not dispose of items by exchange

Disposal by destruction

- 17.17. If it is not possible to dispose of an object through transfer or sale, English Heritage may decide to destroy it.
- 17.18. It is acceptable to destroy material of low intrinsic significance (duplicate mass-produced articles or common specimens which lack significant provenance) where no alternative method of disposal can be found.
- 17.19. Destruction is also an acceptable method of disposal in cases where an object is in extremely poor condition, has high associated health and safety risks or is part of an approved destructive testing request identified in an organisations research policy.

17.20. Where necessary, specialist advice will be sought to establish the appropriate method of destruction. Health and safety risk assessments will be carried out by trained staff where required.

17.21. The destruction of objects should be witnessed by an appropriate member of the English Heritage curatorial department. In circumstances where this is not possible, for example the destruction of controlled substances, a police certificate should be obtained and kept in the relevant object history file.

Disposal by reinstatement

17.22. Where it is proposed to dispose of an object by reinstating it in the building or monument from which it originated the object will not be offered to other institutions.

17.23. Should any statutory consent that is required before reinstatement (including, but not limited to Listed Building Consent, Ancient Monument Consent and Planning Permission) not be obtained, the object will remain as part of the permanent collections.

18. Loans from the collections.

18.1. The loan of objects from the collections falling within this policy will be approved by the Acquisitions, Disposals and Loans Committee on behalf of the Trustees.

18.2. Any loans from the collections to private individuals or organisations not specified in section 18.4 will be assessed on a case by case basis on the criteria set out in section 18.5 and levels of public access to the loaned material. Loans of this nature will require the approval of English Heritage Trustees.

18.3. Loans from the collections will not be made for periods longer than five years, although they may be renewed following approval from the Acquisitions, Disposals and Loans Committee.

18.4. Loans will only be made to:

18.4.1. UK Accredited museums;

18.4.2. UK non-profit making organisations which are not eligible for Accreditation but offer comparable standards of collections care;

18.4.3. Overseas organisations which offer comparable standards of collections care to UK Accredited museums.

18.5. Loans will only be made where staff are satisfied that the borrower can provide appropriate levels of security, environmental conditions, display arrangements, insurance and transport arrangements for the objects they are borrowing.

19. Loans to the collection

19.1. For the purposes of this section a 'long term loan' is a loan which is intended to last longer than 24 months. This includes loans where the agreement is for a shorter period but where the intention is that the loan will be renewed so that the object remains on loan for longer than 24 months. A 'short term loan' is a loan of 24 months or less.

19.2. No loan will proceed unless staff are satisfied that suitable transport, security,

environmental, insurance and display requirements are in place to protect the borrowed objects from loss or damage.

19.3. As far as possible, loans which extend beyond the PLOA will contain a clause which allows for the loan to continue on the same terms to the Historic Buildings and Monuments Commission for England or any licensee that succeeds English Heritage.

19.4. Sections 10.5, 11, 12 and 14 of this policy apply to all objects borrowed by English Heritage.

19.5. Loans to English Heritage that fall within this policy will be approved by the Acquisitions, Disposals and Loans Committee. Loans which fall outside this policy require the approval of the English Heritage Trustees.

19.6. Long term loans must include a clause which allows the loan agreement to be terminated by English Heritage with 12 months' notice or less.

19.7. Long term loans must fall within the priorities listed in section 5 of this policy.

19.8. Short term loans are not required to fall within the priorities listed in section 5 of this policy.

Appendix One

I. History of the collections

- I.1. The origin of the collections can be traced back to the Office of Works and reflects the creation of the national collection of buildings and monuments. The first property to come into Guardianship was Kit's Coty House in 1883, this and other early acquisitions came with no objects and neither did the work at the time generate any through excavation. The first site to come into Guardianship with collections was Carisbrooke, which had become the responsibility of the Office of Works by 1896 bringing with it guns and some other objects. This was followed in 1901 by the Pyx Chamber at Westminster Abbey which was transferred to the Office of Works along with its cope chests.
- I.2. Osborne House was given to the nation in 1902 and opened to the public in 1904. The majority of the collection has always been on long-term loan from the Royal Collection. Management of Osborne and its collection was retained by the Department of the Environment (DoE) between 1984 and 1986. In 1904 Walmer Castle was transferred from the War Office, its contents were given by Lord Curzon (the then Lord Warden) in 1905. Other castles were transferred from the War Office from this time onwards. Once standing buildings became part of the collection architectural material entered the collection as a result of site clearance, consolidation and repair work. Richborough Roman Fort was acquired in 1912 leading to important archaeological collections resulting from Bushe-Fox's 1923 – 38 excavations. Langley Chapel and its furniture came into Guardianship in 1914.
- I.3. Between the wars a programme of major site clearances at ruined abbeys resulted in major additions to the collections, for example Rievaulx, Whitby and Byland Abbeys. In 1933 Corbridge Roman Site was acquired together with the collections of the Corbridge Excavation Fund (from their 1906 – 14 excavations) on long term loan. Later excavation campaigns in 1933 – 73 and 1980 have added significantly to the Corbridge Collections.
- I.4. In 1940 the Office of Works became the Ministry of Works and Buildings, in 1942 the Ministry of Works of Planning and then from 1943 the Ministry of Works.
- I.5. The Ministry of Works took responsibility for the Great Hall of Eltham Palace in 1944 and there are archaeological collections from excavations undertaken there in the 1960s and 1970s. In 1995 English Heritage took over management of the remainder of the site. Wrest Park was acquired in 1946 and, apart from the statuary and garden buildings, was leased to the National Institute of Agricultural Engineering who were required to open the gardens to the public. English Heritage took over the house when the institute closed in 2006.
- I.6. Wroxeter Roman Town was acquired in 1947 and the site produced large archaeological collections from subsequent excavations by Graham Webster from 1955 – 85 and Philip Barker in 1966 – 90. In 1949 Audley End House was purchased, its collections were initially all on loan, however, over half have since been purchased or donated.
- I.7. 1952 saw the acquisition of Aldborough Roman Town including its existing museum, followed in 1954 by Chesters Roman Fort with its museum (which had first opened in 1903) leased from, and with the collections on loan from the Trustees of the Clayton Collection. Chiswick House was acquired in 1956 although its collections have been gradually built up since then. In 1959 Cobham Hall was acquired with some of its contents. The hall was repaired and sold in 1963; however, the contents remained as part of the collection, some being placed on loan with the new owners of Cobham.
- I.8. In 1966 the Alexander Keiller Museum was given to the nation. Heveningham Hall and its contents were acquired in 1969 and the house was repaired and sold in 1977 with the majority of the contents remaining as part of the collection. Also in 1969 responsibility for monuments in Wales and Scotland along with their respective collections was transferred to the Welsh and Scottish Offices. In 1970 the Ministry of Works was absorbed into the new DoE.

- 1.9. Wharram Percy deserted medieval village was acquired in 1972 with the archive of over 110,000 finds from the 1950 – 90 excavations transferred to English Heritage from Hull Museums and the West Yorkshire Archaeological Service in 2014.
- 1.10. In 1973 an Assistant Inspector of Ancient Monuments was appointed with specific responsibility for the collections, later becoming Curator of Archaeology. In 1981 a Curator of Works of Arts was appointed. In 1983 a curator was appointed with specific responsibility for the Hadrian's Wall museums.
- 1.11. 1984 saw the creation of the Historic Buildings and Monuments Commission of England (HBMCE but universally known as English Heritage) and the Royal Armouries, at which point all guns belonging to DoE, including those on sites to be managed by HBMCE, were transferred to the Royal Armouries. Hampton Court, the Tower of London, Kensington Palace and other historic royal palaces remained with DoE. In the early 1990s HBMCE transferred its collections relating to these sites to the Historic Royal Palaces Agency (created in 1989).
- 1.12. On the abolition of the Greater London Council (GLC) in 1986 three houses and their collections were transferred to English Heritage: Kenwood House with the Iveagh Bequest, Marble Hill House and Ranger's House with the Suffolk Collection. In addition to this the Architectural Study Collection was also acquired from the GLC. This had been begun by the Historic Buildings branch of the Architects Department of the London County Council in 1902 when they began collecting parts of demolished buildings which were then transferred to the GLC in 1969.
- 1.13. Sir David Wilson's review in 1988 resulted in a programme of moving collections stored locally on sites, often in unsuitable conditions, into appropriate stores. It also saw an acceleration of the programme of documenting the collections and creating finding lists and catalogues.
- 1.14. Brodsworth Hall was acquired by English Heritage in 1990 including its contents with financial support from the National Heritage Memorial Fund. In 1996 Down House and its collections (originally opened as a museum by the British Association for the Advancement of Science in 1928) were acquired with funding from the Wellcome Trust.
- 1.15. In 2002 a 125 year loan of the Wernher Collection was agreed for Ranger's House. In 2004 responsibility for Apsley House and its collections was transferred to English Heritage from the DoE. The JW Evans Silver Works, Birmingham and its contents were purchased in 2008.
- 1.16. In 2015 management of the collections was transferred from the HBMCE to the newly formed English Heritage Trust (which continues to be known by the name English Heritage), a charitable trust independent of Government. Full details of this arrangement are set out in the Property Licence and Operating Agreement (PLOA).
- 1.17. Between 2015 and 2021 Historic England and English Heritage have benefited from several additions to the collection through the Acceptance in Lieu scheme and the Cultural Gifts scheme. In 2020, management of Gainsborough Old Hall was transferred to English Heritage from Lincolnshire County Council along with the related collections.