

# **Keeping Track**

## **Managing Your Church Assets**

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*Material Heritage Group  
Anglican Church of Canada*



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## *Managing Your Church Assets*

Material Heritage Group  
Anglican Church of Canada



General Synod Archives  
Resources Series #2

 **ABC Publishing**  
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*Keeping Track: Managing Your Church Assets*,  
the Material Heritage Group, Anglican Church of Canada,  
is the second resource in a series produced by General Synod Archives.  
The first resource, *Taking Care: Managing Your Heritage  
Environment*, by Laurel Parson, was published in 1998.

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# Introduction

*Keeping Track* is a guide for documenting the architecture and artifacts, or the material heritage, of the Anglican Church of Canada.

Material heritage is a broad term for all the physical property held by and representative of the Anglican Church of Canada. This includes land, buildings, structures, furnishings, and adornments belonging to each parish, diocese, and synod.

The growing need to preserve the heritage of architecture and artifacts significant to the Anglican Church of Canada was recognized by General Synod, and the Material Heritage Group, working with the General Synod Archives (see Appendix A, page 33), was established to carry out this mandate. The group provides resources, such as this guide, to assist the church at all levels to use its material heritage in a responsible and creative manner.

An important first step is to determine where such material heritage lies, and who is responsible for its custody, control, and care. This requires making inventories of all immovable and movable property. Making inventories makes sense: for insurance purposes, complete documentation of property and artifacts is required; such documentation is also necessary for the smooth disposition of property when a church is declared redundant and closed. Finally, such inventories provide records of the tremendous heritage accumulated by the Anglican Church of Canada over the last two centuries. *Keeping Track* outlines the procedures for creating useful records and explains the objectives behind documenting our material heritage.

If you have questions or comments, please contact the General Synod Archives.



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# Responsibility for Material Heritage

A consistent process for the care and disposition of Anglican Church property in Canada regardless of value does not exist. Interest and initiative at all levels of the church varies as it relates to heritage preservation. The appraisal and heritage designation process itself is directly affected by related provincial and municipal legislation in all jurisdictions. The suggested roles for the national, diocesan, and parish levels of the Anglican Church must be sensitive to these pre-existing criteria.

The objectives of the church, however, must be identified and communicated to ensure that its needs are met. To date, a reactive mode to respond to local heritage initiatives seems to be the norm. Outside organizations, such as historical societies and governments, proceed with inventory, appraisal, and restoration projects without critical input from the church. These organizations and individuals are often the most committed and experienced supporters of the heritage preservation movement. But the church needs to be proactive about its own heritage holdings, making its own appraisals and inventories, so that it can effectively participate in the larger community.

## Designation of Historic Buildings

Historical or architectural designation of a church property can happen in a variety of ways, either at the initiative of the congregation or more often at the initiative of a civil jurisdiction, be it national (Canadian Historic Sites and Monuments Board), provincial, territorial, or municipal. Each designating agency is governed by separate legislation and by particular regulations. The effects of designation may vary. Historical designation usually does not provide any ongoing financial support for property maintenance, but it always carries restrictions. The most common restriction is that the exterior of the structure may not be altered. Before responding to inquiries from architectural conservancy groups or applying for designation, diocesan authorities, including the bishop, need to be consulted, so that the consequences of such a designation may be properly weighed.

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# Suggested Guidelines for Action

To ensure that the appropriate inventories are completed and that a recommended inventory process, along with minimum standards for custody, care, and conservation, are established, the Material Heritage Working Group has developed specific guidelines and procedures. Appropriate action for each level of the church follows.

## National

- Sets overall general objectives/statement of need for preservation of heritage materials
- Provides general list of minimum criteria to establish relative importance – to be used as guidelines (architectural, historical, individual, etc.)
- Provides standard definitions of components and terms for describing material heritage (artifacts, furniture, etc.)
- Provides minimum list of data elements needed to inventory holdings (name, architect, date of construction, previous designations, etc.)
- Maintains inventory of national holdings
- Provides advice on request to dioceses and parishes

## Diocesan

- Confirms overall objectives regarding: commitment to identify and preserve the church's material heritage
- Agrees to use standard definitions and data elements when conducting inventories
- Coordinates inventory process among the parishes
- Coordinates information holdings about church properties (centralization of inventories)
- Performs appraisal and identifies most valued holdings at the diocesan level

- 
- Approves projects to ensure appropriate preservation treatment is completed as per diocesan property policy
  - Sets and approves procedures for the identification and disposition of inventoried holdings

Organizational responsibility could be allocated to a Property and Heritage committee or subcommittee made up of: bishop; solicitor; archivist or chair of Archives committee; Secretary; and chair of property committee.

## Parish

- Conducts inventories and photograph documentation according to standard process
- Maintains holdings according to guidelines
- Submits proposals for appraisal with justification
- Helps identify resources required for inventories
- Coordinates preservation projects at local level
- Using guidelines, ensures appropriate disposition of inventoried items should dissolution of the parish take place

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# Inventory Procedures

## Immovable Heritage

*Immovable heritage* refers to land or land-based resources, such as buildings and natural areas, that are “fixed” in specific locations. Both the historic importance and financial value of church property require guidelines to determine preservation requirements of church buildings and property. To ensure that the most valuable aspects of church material heritage are not lost, an inventory and evaluation must be completed based on standard criteria. It is essential to complete an evaluation as part of an overall inventory process conducted to manage church assets. This should be done on a regular basis and the records kept updated throughout the life of the parish.

### *What do we inventory?*

Structures: churches, chapels, rectories, parish halls  
Sites: cemeteries, archaeological sites (i.e., Garrison Common, Toronto)  
Areas: camps, conference centres, convents, schools, park

## Movable Heritage

*Movable heritage* refers to resources, such as artifacts and documents, that are easily “detachable” and can be transported from place to place.

### *What do we inventory?*

Artifacts: furnishings, liturgical art, utensils, and adornments  
Stained Glass Windows

For documentary material, including parish registers, consult with your diocesan Archivist.

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## Inventory Records

When the inventories are completed, the originals should be kept in the institution or parish files; one copy should be filed with the insurance policy at the diocese, and another copy should be filed "off-site" for additional security.

All information for the stained glass windows in each parish should be kept in one file, including the inventories, donor letters, minutes pertaining to the stained glass windows, invoices, and records of repairs or replacement.

Some parishes have completed a video-taped inventory of their holdings, which could be filed along with the written inventory that documents other pertinent information.

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# Building and Property Inventory Procedure (Form 1)

Take an inventory of each church structure, site, or area connected to the parish using the Building and Property Inventory Form (Form 1). An explanation of each data element required to do a complete inventory is provided below. A sample completed form follows on the next page. A blank Building and Property Inventory Form (Form 1) can be found in Appendix B, on page 34.

**1. Inventory Form Number**

Number each form consecutively, starting from 001.

*Example:* 001, 002

**2. Date of Construction**

The year construction of the building began, date of ground breaking, can be taken from the cornerstone.

*Example:* May 24, 1914

**3. Institution/Parish Name (Name and Address)**

Identify the parish or institution by name and street address. Include municipality.

*Example:* St. Matthew (Islington)  
3962 Bloor Street West  
Etobicoke, Ontario  
M9B 1M3

**4. Architect(s)**

The individual or firm engaged to design the church building.

*Example:* Howard Walker  
Darling and Pearson

**BUILDING AND PROPERTY INVENTORY FORM  
(Form 1)**

1. Inventory Form Number: 001		2. Date of Construction: May 1932	
3. Institution/Parish Name (Name and Address): St. Jude's Church, Sleepy Hollow, P.O. Box 428, Maybeville			
4. Architect(s): Johnston and Johnston			
5. Builder(s): unknown			
6. Type of Building: Church — Parish Hall added in 1960 (see: 002)			
7. Cost of Construction: unknown		8. Construction Materials: Stone tower, rest brick covered with stucco	
9. Date of Consecration: May 5, 1933		10. Date(s) of Preservation Projects:	11. Original Site: yes
12. Floor Plan Shape: rectangle		13. Seating Capacity: nave 325, choir 32	14. Physical Condition: good
15. Special Features (architectural highlights): window in tower thought to be only Dieppe Memorial Window in Canada			
16. Significance: Tower built by rector and local boys and girls			
17. Building Designation and By Whom: No			
18. Reference Notes: 9, cornerstones 2, 4, 12 Blueprints		15, 16 Advisory Board Minutes Correspondence files	
19. Existing Documentation: Site Plan/Survey <input checked="" type="checkbox"/> Location <u>Rector's Office</u>  Architectural and Engineering <input checked="" type="checkbox"/> Location <u>Rector's Office</u>		20. Existing Photographs: Many interior & exterior, various dates	
21. Inventory Form Completed by: Jane Doe		22. Date Completed: June 1995	
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.			

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**5. Builder(s)**

The individual or firm engaged to construct the church building.

*Example:* John Smith Construction, Brantford

**6. Type of Building**

*Church, cathedral, or chapel:* a building used by a congregation as a place of worship

*Church hall or parish hall:* a building used for social gatherings

*Office or administration building:* a building used to accommodate the clerical, administrative, or management staff

*Housing or Quarters:* a building used as a dwelling by religious personnel (i.e., rectory). Include address if different from the parish

*Convent:* a building used to house a religious community

*School:* a building used for instruction, schooling, training

*Statue or monument:* a structure that commemorates a person, place, or event

*Outbuilding:* a building associated with and located on the property of the church (i.e., garage)

*Other:* a building used for religious purposes that cannot be described by the above terms

**7. Cost of Construction**

Original cost to construct the building.

*Example:* \$325,000

**8. Construction Materials**

The main material used to construct the building.

*Example:* Wood

Stone

Brick

Concrete

Unknown

Other

**9. Date of Consecration**

Date of consecration service.

*Example:* May 24, 1915

**10. Date(s) of Preservation Projects**

Date that major expansion or renovation projects were begun.

*Example:* Addition of parish hall, 1967

---

**11. Original Site**

Is the building currently located on original site?  
Name site(s) where the building was originally located.

**12. Floor Plan Shape**

Describe the basic shape of the first or ground floor.

*Example:* Square  
Rectangle  
L-shaped  
U-shaped  
T-shaped  
H-shaped  
Cruciform  
Irregular

**13. Seating Capacity**

Number of individuals that can be seated in the nave. Include choir.

*Example:* Nave 352  
Choir 30

**14. Present Physical Condition**

Describe the overall condition of the building.

*Example:* Poor  
Good  
Excellent  
Already been treated

**15. Special Features (architectural highlights)**

Note specific distinguishable architectural features.

*Example:* Tower and steeple

**16. Significance**

An assessment or opinion regarding the relative historical importance of the building, including its historical associations.

*Example:* Unique example of Gothic style in this region

**17. Building Heritage Designation and By Whom**

Is the building currently designated as historically or architecturally significant? Who has made this determination?

*Example:* Local LACAC (Local Architectural Conservation Advisory Committee)

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**18. Reference Notes**

The source of the information for any of the above categories.  
Note the category (by its number), then the source of information.

*Example:* 2, 7 insurance records  
11 Elizabeth Smith (parish secretary)

**19. Existing Documentation**

Identify whether a site plan/survey and/or architectural and engineering records exist and the exact location of the documents.

*Example:* Insurance file, parish secretary's office  
Church vault  
Diocesan Archives  
Basement utility room, east corner

**20. Existing Photographs**

List photographs that show architectural features, original construction, major changes to building, current condition, and the dates of the images.

*Example:* Original construction photos, circa 1906  
Current exterior views, 1989

Append photograph(s) of the structure, noting complete information about the photo, the date, and the person who took the photograph.

*Example:* St. Matthew (Islington) – Front entrance facing north;  
Roy Mitchell (photographer); January 20, 1989

**21. Inventory Form Completed by**

Name of the person who filled out the form.

*Example:* Jane Smith

**22. Date Completed**

Date inventory form was completed.

*Example:* January 30, 1989

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# Artifact Inventory Procedure

## (Form 2)

Take an inventory of all significant objects possessed by the parish. The following descriptive information is provided to assist accurate completion of the inventory form. A sample completed form follows on the next page. A blank Artifact Inventory Form (Form 2) can be found in Appendix B, page 35. This inventory procedure has been adopted from the Diocese of Fredericton procedure, developed in 1991.

**1. Inventory Form Number**

Number each form consecutively.

*Example:* 001, 002

**2. Date Received**

The date the object was acquired.

*Example:* 1973

**3. Institution/Parish Name (Name and Address)**

The institution responsible for the maintenance of the object.

Always include the diocese and parish and/or congregation name.

**4. Terms of Acquisition by Parish**

How the object was acquired; check one.

*Example:* Gift

Purchase

Loan

Other

**5. Source**

The vendor or donor of the object.

*Example:* Anglican Book Centre, Toronto

Donated by Mr. and Mrs. Clark

**ARTIFACT INVENTORY FORM  
(Form 2)**

1. Inventory Form Number: 001		2. Date Received: June 22, 1965	
3. Institution/Parish Name (Name and Address): St. Jude's Church, Sleepy Hollow, P.O. Box 428, Maybeville			
4. Terms of Acquisition: Gift <input checked="" type="checkbox"/> Purchase _____ Loan _____ Other _____			
5. Source: Major and Mrs. H.P. Wells "To the glory of God and in loving memory of their son John Edward Wells, 1940-1965"			
6. Type of Object: Chalice - for matching paten, see £017			
7. Quantity: One		8. Material: sterling silver, gilt lined with precious and semi-precious stones	
9. Date made and used: made 1960 used 1965-		10. Date Repaired/Restored: _____	11. Physical Condition: Excellent
12. Dimensions: (metric) Height 21 cm Width _____ Length _____ Other 10 cm diameter depth of cup 7 cm			
13. Artist/Manufacturer: Samuel Johnson & Co., London, England stamped No. 1338			
14. Significance: Mr. Wells was People's Warden, 1960			
15. Style/Cultural Tradition: Traditional chalice		16. Origin - Country: England	
17. Province/State:			
18. Reference Notes: gift register			
19. Existing Documentation: Photographs 3 Date 1965 Photographer unknown		20. Present Location of Item: cupboard on west wall of sacristy	
21. Inventory Form Completed by: Jane Doe		22. Date Completed: June 1995	
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.			

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**6. Type of Object**

The type of object taken from a standard list of items.

*Examples:* Altar

Altar rail

Church plate

Font

Lectern

Offering plates

Organ (other musical instruments)

Pews and benches

Pulpit

Reading desk

Rood screen

Tapestries and textiles (including carpets and rugs)

Other sanctuary furniture

Other significant church furniture

Other contents of the sanctuary (painted tiles, altar hangings)

Bell(s)

Coats of arms

Flags and banners

Lights and lanterns

Memorials (other than stained glass windows)

Artwork applied directly to wall or roof

Maps/architectural drawings (on display)

Paintings/drawings

Sculptures

Clocks

Photographs

Books

**7. Quantity**

The precise number of similar or identical items described on the form.

*Example:* Pews of similar design, appearance, size, etc.

**8. Material**

The material(s) from which an object is made. The materials should be recorded in the most specific form, from the most to the least predominate.

*Example:* Oak, velvet

Sterling silver, mahogany

Butternut, pine

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**9. Date Made and Used**

The specific date the object was made, or an approximation.

The specific dates, or an approximation, that the object was in use.

*Example:* Made ca. 1890

Used 1890 to date

**10. Dates Repaired/Restored**

The specific dates the physical characteristics of the object were modified, through repair or restoration, or an approximation.

A description of the nature of the repair/restoration.

*Example:* Repainted 1975

**11. Present Physical Condition**

Describe the overall condition of the object.

*Example:* Poor

Good

Excellent

Already treated

**12. Dimensions**

The overall measurements, including height, width, and length in centimetres. Include other dimensions helpful in describing and documenting the physical characteristics of the object, or an important component of the object, in centimetres.

*Example:* Height – 2 cm

Width – 10 cm

Length – 15 cm

Other – 10 cm diameter, depth of cup 7 cm

**13. Artist/Manufacturer**

The names of the artists, makers, designers responsible for the design and/or execution of the object.

**14. Significance**

An assessment or opinion regarding the relative historical importance of the object, including its historical associations.

*Example:* The object is very important to the history of the area because it belonged to the Rev. John Smith, the first known missionary of the parish.

---

**15. Style/Cultural Tradition**

The stylistic and cultural associations of the object.

*Example:* Gothic revival

Folk art

Irish

**16. Origin – Country**

The country of origin of the object.

*Example:* England

Canada

United States

**17. Origin – Province/State**

Include the province or state if the country is Canada or the United States.

*Example:* New Brunswick

New Hampshire

**18. Reference Notes**

The source of the information for any of the above categories.

Note the category (by its number), then the source of information.

*Example:* 4, 5 insurance records

6 memorial book

**19. Existing Documentation – Photograph(er)**

Append photograph or detailed drawings of the object, noting the date and the person who took the photo or made the drawing.

*Example:* Roy Mitchell (photographer), January 20, 1989

**20. Present Location**

Identify the exact location of the object.

*Example:* Top shelf in the oak cupboard in church office

Located on south, interior wall between the second and third windows from the chancel

Basement utility room, east corner

**21. Inventory Form Completed by**

Name of the person who filled out the form.

*Example:* Jane Smith, Chancel Guild

**22. Date Completed**

Date inventory form was completed.

*Example:* January 20, 1989

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# Stained Glass Windows

## Inventory Procedure

(Form 3)

Stained glass windows are a part of the glory of church buildings and should be recorded carefully. Before starting the inventory, draw a plan of the church, marking in all the windows. Number the east window 700 and work clockwise until all the windows are numbered. Use “suffix t” for tower windows. (See Figure 1 on page 24.)

Fill out one inventory form for each window in the institution or parish. A sample completed form follows on the next page. A blank Stained Glass Windows Inventory Form (Form 3) can be found in Appendix B, page 36.

**1. Inventory Form Number**

Number each form using the 700 numbers already assigned to each window. Start with the east window.

*Example:* 700

710T

**2. Date Installed**

The date the window was installed in the building.

*Example:* 1973

**3. Institution/Parish (Name and Address)**

The institution or parish building where the window was installed. Always include the diocese and parish and/or congregation name.

**4. Terms of Acquisition by Parish**

How the window was acquired; check one.

*Example:* Gift

Purchase

Loan

Other

**STAINED GLASS WINDOWS INVENTORY FORM  
(Form 3)**

1. Inventory Form Number: 700		2. Installed: 1950	
3. Institution/Parish Name (Name and Address): St. Jude's Church, Sleepy Hollow, P.O. Box 428, Maybeville			
4. Terms of Acquisition: Gift <input checked="" type="checkbox"/> Purchase _____ Loan _____ Other _____			5. Cost of Construction: \$3,500
6. Source: Robert McCausland Ltd.			
7. Subject of Window: Memorial — "The dead in Christ shall rise" "To the glory of God and the memory of John Smith"			
8. Description of Window: Three light early Gothic with a tall central light			
9. Date of Dedication: March 10, 1950		10. Date Repaired/Restored: _____	11. Physical Condition: good
12. Dimensions: (metric) Height 2m Width 5m Other _____			
13. Artist/Manufacturer: Robert McCausland Ltd.			
14. Significance: Unique contemporary treatment of the subject			
15. Style/Cultural Tradition: Contemporary glass design in early Gothic style			16. Location in the Church Chancel — E wall
17. Reference Notes: 2, 4, 5, 6, 9, 13 — Minutes, Correspondence files			
18. Existing Documentation: Photographs of the whole window and each individual light  Photographer Roy Mitchell Date March 1950			
19. Inventory Form Completed by: Jane Doe			20. Date Completed: June 1995
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.			

---

**5. Cost of Construction**

If the window was purchased or commissioned, record the cost.

*Example:* \$2,500.00

**6. Source**

The vendor or donor of the window.

*Example:* Robert McCausland Ltd., Toronto

Donated by Mr. and Mrs. Clark

**7. Subject of the Window**

Record the subject and scripture reference to identify the window.

*Example:* The Light of the World, "Behold I stand at the door and knock"  
The Ascension, "Lo, I am with you always, even unto the end of the world"

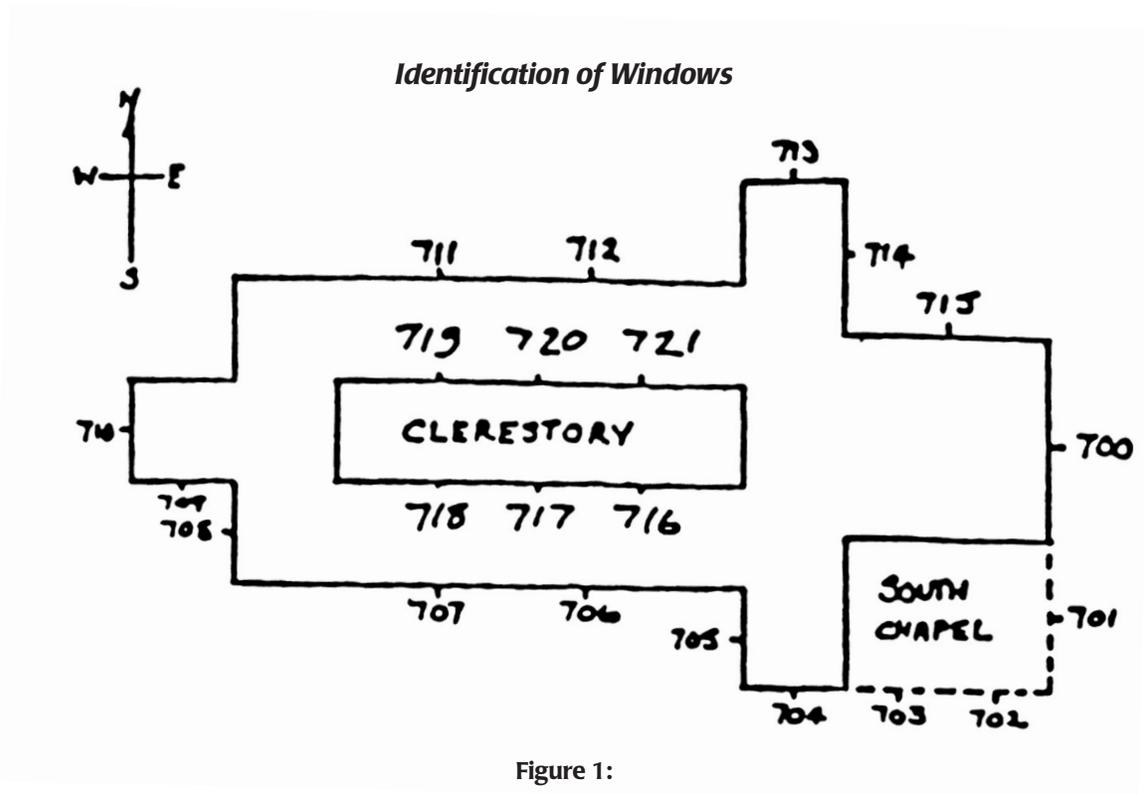


Figure 1:

Windows recorded on a sketch plan of the church in a numbered sequence.

The plan is orientated with a compass bearing.

(Reproduced here with permission from The National Association of Decorative and Fine Arts Societies,

*Inside Churches: A Guide to Church Furnishings*, 1989, page 230.)

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**8. Description of the Window**

How many lights or panels of stained glass?  
What kind of top – cusps, trefoil cusps, tracery?

*Example:* Two light perpendicular with tracery

*See Window Designs diagram for further selections (Figure 2, page 26). A more detailed description of the window can be done by sketching an outline of the lights and tracteries of the window and describing what is depicted in each section. (Figure 3, page 26)*

**9. Date of Dedication**

Date the window was dedicated.

*Example:* May 14, 1961

**10. Date Repaired/Restored**

Include a description of the nature of the repair/restoration.

*Example:* Remounted 1975

Replaced 1950

*Windows should be protected on the outside with wire, glass, or Plexiglas. Stained glass does not fade, but weather pits and corrodes the surface. There should be air space around the window, so that changing temperatures will not cause moisture to build up. Repairs should be attempted only by professionals.*

**11. Physical Condition**

Describe the overall condition of the window, using the following list.

*Examples:* Poor

Good

Excellent

Already treated

**12. Dimensions**

The overall measurements, including height and width in metres.

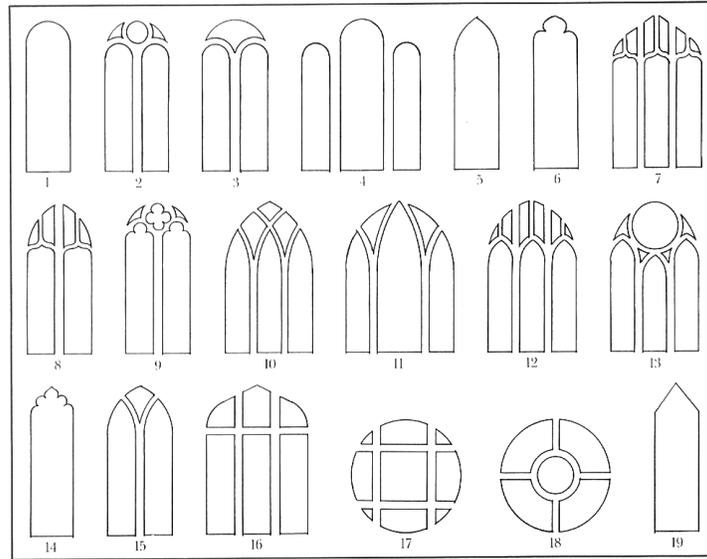
Other dimensions that will describe odd-shaped windows.

*Example:* Height – 5 m

Width – 2 m

Diameter – 2 m

## Window Designs



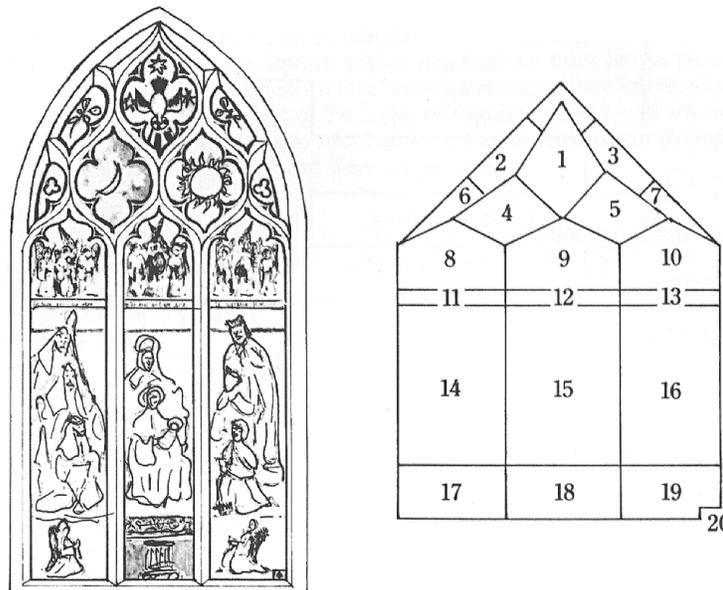
**Figure 2:**

Nineteen different window designs to help describe stained glass windows.

(Reproduced here with permission from Robert McCausland Limited), *The Eternal Art of Stained Glass*, page 3.)

### **Detailed Window Descriptions**

Late 19th-century window. Stonework is of the late 19th century with 3 trefoil headed lights with 14th-century reticulated-style tracery.



**Figure 3:**

A sketch plan numbering the lights across from left to right. Starting at the top, record a description of each light in numerical sequence. Example: One dove descending amidst three stars in purple night sky.

(Reproduced here with permission from The National Association of Decorative and Fine Arts Societies, *Inside Churches: A Guide to Church Furnishings*, 1989, page 229.)

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**13. Artist / Manufacturer**

The names of the artists, makers, designers responsible for the design and/or execution of the window.

*Example:* Joseph McCausland,  
Robert McCausland Limited, Toronto

**14. Significance**

An assessment or opinion regarding the relative historical importance of the window, including its historical associations.

Record memorial dedications here as well.

*Examples:* War memorial window, largest traditional window in North America  
"To the Glory of God and the Memory of the Smith Family"

**15. Style / Cultural Tradition**

The stylistic and cultural associations of the window.

*Example:* Gothic  
Classical  
Contemporary  
Traditional

**16. Location in the Church**

Note the exact location of the window in the church, using the plan as exemplified in Figure 1, page 24.

Chapels should be described by compass point rather than name, i.e., South Chapel rather than Lady Chapel.

*Example:* Nave S wall E  
South Chapel E wall

**17. Reference Notes**

The source of the information for any of the above categories.

Note the category (by its number), then the source of information.

*Example:* 2, 10 church records

**18. Existing Documentation – Photograph(er)**

Have photographs or drawings made of each window as a whole, and each individual light showing the details on both sides.

Append photographs or detailed drawings of each window, noting the number of the window, the date, and the person who took the photo or made the drawing.

*Example:* Window 710T, Roy Mitchell (photographer), January 20, 1989

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**19. Inventory Form Completed by**

Name of the person who filled out the form.

*Example:* John Smith

**20. Date Completed**

Date inventory form was completed.

*Example:* January 20, 1989

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# Guidelines on Disposition of Redundant Church Property

## Introduction

Both the historic importance and financial value of church property require guidelines to determine eventual preservation or disposal of redundant church buildings and artifacts. To ensure that the most valuable aspects of church material heritage are not lost, an inventory and evaluation must be completed based on standard criteria. It is essential to complete an evaluation as part of an overall inventory process conducted to manage church assets. This should be done on a regular basis and records kept updated throughout the life of the parish. Then, if a parish faces the question of redundancy, the disposition can be facilitated more smoothly.

## Declaring a Building Redundant

Church buildings are more than bricks and mortar. They are symbolic representations of a community and its faith. Unfortunately, in our times, some of those communities, and the diocese of which they are part, can no longer justify keeping the building open and the community active because of financial difficulties, changing demographics, or the deterioration of the building beyond reasonable repair.

It is essential that each diocese have in place policies and procedures that will ensure that such situations are handled in the most sensitive pastoral manner possible, and with scrupulous attention to both canon and civil legal procedures.

The diocesan Archivist can provide advice regarding what to consider for the disposition of the building and any heritage materials.

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## Guidelines for the Preparation of a Building to be Closed or Sold

1. The rector and wardens or designated diocesan authority shall prepare an inventory or update an existing inventory of all moveable property and wall fixtures that will become available pending closure.
2. A written proposal for disposition of each major piece shall be prepared by the designated responsible person or body with rationale for consideration of the following options:
  - a. transfer to diocese
  - b. transfer to another parish directly
  - c. transfer to another parish indirectly through diocesan gifts and exchange registry
  - d. return to original donor's family
  - e. transfer to a museum
  - f. appraisal and sale
  - g. other
3. All items that are to be sold shall be appraised by an independent appraiser/dealer and sold for "fair market value."
4. The rector and wardens or designated diocesan authority shall approve of all disposition of church property and shall assign revenue appropriately.
5. The rector and wardens or designated diocesan authority shall retain responsibility for the security of all church property pending transfer to the new owner.
6. The new owners of the transferred items should be encouraged to recognize the donation through the preparation of a suitable plaque identifying the object, the donors, and the date received.

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# Selected Resources

"Art of the Spirit." Helen Bradfield, Joan Pringle, and Judy Ridout. Toronto: Dundurn Press Limited, 1992. *Glossary of Fabric Art Terms*, p. 125.

"Artifact Inventory Project," Archives Committee, Diocese of Fredericton, October, 1991.

"CCI Notes," Ottawa: Canadian Conservation Institution.

The following helpful informational brochures are available free of charge from

*Canadian Conservation Institution*  
1030 Innes Road  
Ottawa, Ontario  
K1A 0M5  
Tel.: (613) 998-3721  
Fax: (613) 998-4721  
E-mail: cci-icc\_publications@pch.gc.ca

- N1/1 Precautions for Storage Areas
- N2/1 Ultraviolet Filters
- N5/1 Care of Ceramics and Glass
- N9/3 The Cleaning, Polishing and Protective Waxing of Brass and Copper
- N9/7 Silver – Care and Tarnish Removal
- N10/4 Environmental and Display Guidelines for Paintings
- N11/8 Display Methods for Books
- N13/5 Hanging Storage for Costumes
- N14/1 Emergency Preparedness for Cultural Institutions: Introduction
- N14/2 Emergency Preparedness for Cultural Institutions: Identifying and Reducing Hazards

*Change and Decay: The Future of Our Churches.* Marcus Binney and Peter Burman. London: Cassell and Collier Macmillan Publishers Ltd., 1977.

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*The Eternal Art of Stained Glass.* Robert McCausland Limited, Toronto.

*The Evaluation of Historic Buildings.* Parks Canada, 1980.

*Hallowed Walls: Church Architecture of Upper Canada,* Marion MacRae and Anthony Adamson. Toronto: Clark, Irwin and Company Limited, 1975.

*The Heritage Strategy Planning Handbook: An International Primer.* Marc Denhez. Toronto: Dundurn Press, 1997.

*Inside Churches: A Guide to Church Furnishings.* The National Association of Decorative and Fine Arts Societies. London, 1989.

*Nomenclature for Museum Cataloguing, System for Classifying Man Made Objects.* Robert G. Chenhall. 1978.

*Our Christian Heritage.* Warick Rodwell and James Bently. London: George Phillip, 1984.

*Pioneer Churches.* John de Visser and Harold Kalman. New York: W.J. Norton and Company Inc., 1976.

*Religious Objects: Users Guide and Vocabulary, Bilingual Format.* Co-published by Direction des musée de France and the Canadian Heritage Information Network. Paris: Editions de la Réunion des musés nationaux, 1994.

Review of Diocesan submissions on heritage policy, 1993.

*Rules for Archival Description.* Bureau of Canadian Archivists, 1996–97.

*Sacred Space and Structural Style: The Embodiment of Socio-Religious Ideology.* Vicki Bennett. Ottawa: University of Ottawa Press, 1997.

*A Study of Anglican Church Buildings in Manitoba.* Kelly Crossman. Manitoba Culture, Heritage and Recreation, Historic Resources, 1989.

*Taking Care: Managing Your Heritage Environment.* Laurel Parson. Toronto: Anglican Book Centre, 1998.

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# Appendix A

## Material Heritage Group (1992–1996)

### ***Chair***

Dr. Gregg Finley  
St. Stephen's University, New Brunswick

### ***Members***

Rev. Richard Berryman  
Archdeacon of Hamilton

Nancy J. Hurn, Archivist  
Metropolitan Toronto Archives

Margaret Machell (retired)  
Keeper of the Grange  
Art Gallery of Ontario

### ***Staff***

Teresa Thompson  
General Synod Archivist

Dorothy Kealey  
Archivist / Records Management

**BUILDING AND PROPERTY INVENTORY FORM  
(Form 1)**

1. Inventory Form Number:		2. Date of Construction:	
3. Institution/Parish Name (Name and Address):			
4. Architect(s):			
5. Builder(s):			
6. Type of Building:			
7. Cost of Construction:		8. Construction Materials:	
9. Date of Consecration:		10. Date(s) of Preservation Projects:	11. Original Site:
12. Floor Plan Shape:		13. Seating Capacity:	14. Physical Condition:
15. Special Features (architectural highlights):			
16. Significance:			
17. Building Designation and By Whom:			
18. Reference Notes:			
19. Existing Documentation: Site Plan/Survey _____ Location _____		20. Existing Photographs:	
Architectural and Engineering _____ Location _____			
21. Inventory Form Completed by:		22. Date Completed:	
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.			

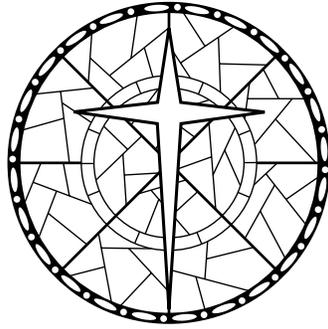
**ARTIFACT INVENTORY FORM  
(Form 2)**

1. Inventory Form Number:		2. Date Received:	
3. Institution/Parish Name (Name and Address):			
4. Terms of Acquisition: Gift _____ Purchase _____ Loan _____ Other _____			
5. Source:			
6. Type of Object:			
7. Quantity:		8. Material:	
9. Date made and used:		10. Date Repaired/Restored:	11. Physical Condition:
12. Dimensions: (metric) Height _____ Width _____ Length _____ Other _____			
13. Artist/Manufacturer:			
14. Significance:			
15. Style/Cultural Tradition:		16. Origin – Country:	17. Province/State:
18. Reference Notes:			
19. Existing Documentation: Photographs _____ Date _____  Photographer _____		20. Present Location of Item:	
21. Inventory Form Completed by:		22. Date Completed:	
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.			

**STAINED GLASS WINDOWS INVENTORY FORM  
(Form 3)**

1. Inventory Form Number:		2. Installed:
3. Institution/Parish Name (Name and Address):		
4. Terms of Acquisition:  Gift _____ Purchase _____ Loan _____ Other _____	5. Cost of Construction:	
6. Source:		
7. Subject of Window:		
8. Description of Window:		
9. Date of Dedication:	10. Date Repaired/Restored:	11. Physical Condition:
12. Dimensions: (metric) Height _____ Width _____ Other _____		
13. Artist/Manufacturer:		
14. Significance:		
15. Style/Cultural Tradition:	16. Location in the Church	
17. Reference Notes:		
18. Existing Documentation: Photographs _____  Photographer _____ Date _____		
19. Inventory Form Completed by:	20. Date Completed:	
Please complete one form for each structure, site, or area. Additional details can be provided on an attached page(s) as required.		





# Keeping Track

## Managing Your Church Assets

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*Material Heritage Group  
Anglican Church of Canada*

**H**OW CAN YOU ensure that your church's precious heritage is preserved? That its material heritage is recognized and used in a responsible and creative manner?

*Keeping Track* will show you how to

- create and maintain practical records, so that you can truly manage your church assets
- take systematic inventory of buildings, property, and artifacts, so that the historic importance and financial value of your church property are documented for both insurance and heritage purposes.

The manual includes reproducible inventory forms for buildings and artifacts, along with sample completed inventories.



**General Synod Archives**  
*Resources Series #2*



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