

# Carved Stones

**Scottish Executive Policy and Guidance**

**Carved Stones:  
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This document has evolved over several years. During that time it has benefited from the input of many individuals, particularly Dr Susan Buckham (CSA Carved Stones Adviser) and the representatives of the many national agencies who are involved with the National Committee on Carved Stones in Scotland. Dr Siân Jones' innovative research on the social value of early medieval sculpture has also been particularly welcomed.

**ILLUSTRATIONS**

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Cover picture: Detail of Pictish cross-slab from Rosemarkie, Highland. Details, from left to right: Jedburgh shrine; Melrose gravestone; Hawthornden prehistoric carvings (copyright Bern Balfe); and Jedburgh Abbey doorway.

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# Foreword

Scotland's rich and varied resource of carved stones is an important cultural asset. From the skill demonstrated in prehistoric rock art to the social and symbolic significance of sculptures or gravestones, carved stones are a tangible connection to a very human element of our past.

People have been interested in historic carved stones for centuries. Their protection, preservation and presentation raise many issues, which this policy and guidance seeks to address.

This document sets out Scottish Ministers' policies and guidance for the care and protection of carved stones. It has been prepared by Historic Scotland, an agency of the Scottish Executive directly responsible to the Scottish Ministers.

An important distinction is made within the document between strategic policy that the Scottish Ministers will seek to uphold, operational policy that relates specifically to the work of Historic Scotland and more general guidance that everyone should follow when dealing with carved stones.

Effective protection of carved stones will continue to be achieved most effectively through better understanding of the issues involved and collective effort to address them. Whilst taking the lead in many cases, Historic Scotland is not the only organisation responsible for the future of our carved stones. For example, the National Committee on Carved Stones in Scotland, founded in 1993 to draw attention to the threats that face carved stones and encourage a common approach to their recording and preservation, is an excellent example of the vital role played by partnership working.

I hope that, with this policy and guidance, Historic Scotland and everyone else involved will be encouraged, and better placed, to identify priorities and implement strategies and action plans to respond to the needs of individual sites and categories of our important carved stones.



Patricia Ferguson  
Minister for Tourism, Culture and Sport

## PART

# 1

## Background and aims

### 1.1 Carved stones

**1.1.1** For the purposes of this document, ‘carved stone’ is used as a generic term for what in Scotland can be broadly categorised under the headings of:

- prehistoric rock art
- Roman, early medieval, later medieval and post-reformation sculpture
- architectural sculpture
- architectural fragments
- gravestones.

(More information about this range of carved stones is provided below).

These represent an extraordinary cultural resource spanning over 5,000 years of human activity in



Figure 1 Carved Stones are all around us: a gravestone from Melrose Abbey, Scottish Borders.

Scotland; they are an important and significantly large proportion of the monuments and artefacts that survive from past times (Fig 1). Such worked stones provide evidence for the beliefs and technological skills of our ancestors, how life varied from one part of Scotland to another and how this differs from elsewhere in the world. Carved stones help to define the character of our environment and present-day identities, both local and national. They have enormous and largely untapped potential, particularly for sustainable tourism and educational initiatives; but they require active conservation.

**1.1.2** The emphasis here is on carved stones that are still physically associated in some way with their place of manufacture or one of their stages of use, rather than carved stones that are now found as artefacts in off-site museums. No attempt is made specifically to address the needs of recent monumental public sculpture. Nonetheless, there is much here that we hope will be of wider relevance.

### 1.2 Background to this document

**1.2.1** Scotland’s first policy statement on carved stones was produced in 1992.<sup>1</sup> In preparing this new statement Historic Scotland has drawn on 120 years of their and their predecessor bodies’ experience of dealing with carved stones. This revised policy statement was the subject of a three month consultation period early in 2004 and has benefited considerably from the feedback received.

### 1.3 Aims

**1.3.1** This policy and guidance is primarily aimed at those with a professional interest in carved stones and/or responsibility towards their conservation as part of the historic environment, although it contains much that is of interest to a wider audience.

<sup>1</sup> Historic Scotland 1992 *Carved Stones: Historic Scotland’s Policy*.

**1.3.2** In producing guidance that updates and supersedes our 1992 policy we are seeking to effect:

- the protection and optimum conservation of what is likely to be deemed to be significant by future generations
- the assessment and understanding of a monument's cultural significance before any decisions are made regarding its future or any changes to its fabric or setting
- the interpretation of a carved stone or a place associated with a carved stone in a manner appropriate to its cultural significance
- conformity with and contribution to the development of national and international best conservation and interpretation practice
- the full use of existing expertise to further our understanding of carved stones in general
- the encouragement of interest in carved stones and awareness of the importance of this resource and of the need for concerted local efforts if the most significant examples from throughout Scotland are to be adequately understood, protected and conserved for future generations to appreciate
- the definition of what Historic Scotland can do and what it should encourage and facilitate others to do, and the responsibilities of other national and local bodies.

**1.3.3** A distinction is made between strategic policy that the Ministers will seek to uphold (see 2.0), operational policy that relates specifically to the work of Historic Scotland (see 3.0), and more general guidance for everyone to follow when dealing with carved stones (see 4.0). For ease of cross-reference, each of these is presented in this document under five general headings:

- Legal protection
- Raising awareness
- Conservation strategies and practice, including intervention
- Research and information
- Historic Scotland setting example of best practice.

**1.3.4** To help with the implementation and application of the policy and guidance contained in this document, Historic Scotland intends to produce strategies and action plans for the conservation of carved stones in general and specific categories of carved stone. The Agency will seek to involve key stakeholders in their development and make them available on its website.

Other organisations are encouraged to do the same for their own areas of responsibility.

**1.3.5** Historic Scotland may also be able to offer financial support towards the conservation of carved stones (see Appendix D).

## **1.4 Why produce generic policy and guidance for the treatment of carved stones?**

**1.4.1** The guidance recognises the shared attributes of carved stone and embraces all types, rather than individual types of sculpture. Most obviously, these types of monuments are often prone to the same range of threats. Formed from stone that has been worked to a greater or lesser degree by human hands, they share vulnerability to environmental erosion, which varies with the geology of the stone in question, and hence demand the same type of specialised conservation (Fig 2). The fact that they are often ornate and beautiful monuments in their own right increases their historic and present value in monetary as well as cultural terms. Many, particularly those that are already portable, are unfortunately vulnerable to theft. They can also be vulnerable to inappropriate human management practices, whether associated with land management (e.g. allowing grazing

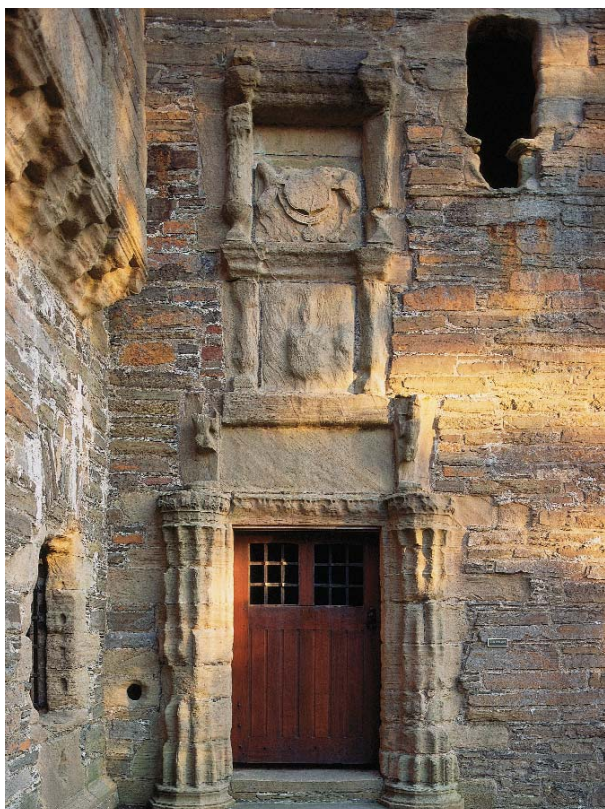


Figure 2 Carved Stones are often vulnerable to weathering and environmental erosion: external doorway at Earl's Palace, Kirkwall.



Figure 3 We can inadvertently damage carved stones: cattle congregating on prehistoric rock art in Dumfries and Galloway.

animals to stand on carved rock surfaces: Fig 3) or the enthusiasm of visitors (touching, rubbing, chalking or cleaning of carved stones).

Vulnerability to such threats will, in part, be a factor of where the carved stones are located and whether or not they are portable.

**1.4.2** A carved stone may have a dual identity – is it a monument or is it an artefact? This is not simply a question of formal legal definition, but is bound up with the related issues of ownership and ‘belonging’ (the perceived relationship between monument, community and place that can be particularly important in local perceptions of identity).<sup>2</sup> Carved stones can be both monuments in their own right and parts of larger monuments – a gravestone and a part of a graveyard, a decorated archway and part of a church. In each case carved stones have a strong association with their place of use. However, once they become technically portable (they are not earthfast or wallfast), on the basis of their present form and context, the law tends to regard them as artefacts (Fig 4). This has implications for how and if they can be legally protected, who then legally owns them, where and how they are administered and by whom. This in



Figure 4 Now a portable artefact in legal terms, this 12th-/early 13th-century architectural fragment originally formed part of Dryburgh Abbey, Scottish Borders, although its precise function is unknown.



Figure 5 On behalf of Scottish Ministers, Historic Scotland looks after some of the most important carved stones in Scotland: 16th-century MacLeod's tomb, St Clement's Church, Rodel, Western Isles.

turn may have implications for how the physical association between a carved stone and its place of use is retained.<sup>3</sup>

## 1.5 Ownership, responsibility and protection

**1.5.1** Identifying owners of carved stones can be complicated (see Appendix A). As with any monument, the owner or legal guardian is responsible for the conservation of the carved stone, although there is unlikely to be a legal obligation to take any action. Historic Scotland provides advice on the appropriate action for scheduled ancient monuments, the local authority provides advice on those that are not scheduled.<sup>4</sup>

<sup>2</sup> Jones 2004 *Early Medieval Sculpture and the Production of Meaning, Value and Place*, section 6.1.

<sup>3</sup> This distinction, its history and implications as related to early medieval sculpture, can be found in Foster 2001 *Place, Space and Odyssey*.

<sup>4</sup> In the case of Category A listed buildings, the local authority may need to forward relevant enquiries to Historic Scotland.



Figure 6 Museums play a vital role in caring for portable carved stones: Tarbat Discovery Centre, Highland, contains a very important collection of early medieval carvings from the Pictish monastery on which it is sited.

**1.5.2** Scottish Ministers have the powers to undertake any works urgently necessary for the preservation a monument that is not in their care.<sup>5</sup> Local authorities can serve a ‘repairs notice’ on a listed building, specifying works considered reasonably necessary for its proper preservation.<sup>6</sup>

**1.5.3** Over 330 scheduled ancient monuments are in the direct care of Scottish Ministers and conserved and protected on their behalf by Historic Scotland. These include very significant collections of sculpture of all periods and types, as well as individual monuments (Fig 5).

**1.5.4** The type of legal protection that can be applied to a carved stone will depend not only on the significance of the carved stone but also on whether or not it is movable and where it is (see Appendix B). Both the Ancient Monuments and Archaeological Areas Act 1979 (the 1979 Act) and Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997 (the 1997 Act) can be applied to the legal protection of carved stones.

**1.5.5** An estimated 4,000-5,000 examples of portable carved stones of all periods are owned by and/or in the care of museums in Scotland. Such museums, most of which are administered by local authorities, therefore play a significant part in caring for this important aspect of Scotland’s heritage (Fig 6). They also play an invaluable role in interpreting and raising awareness of the carved stones that are not housed in collections.

## 1.6 Range of carved stones

**1.6.1** Prehistoric rock art is an ‘artificially created mark that is cut, engraved, incised, etched, gouged, ground or pecked into, or applied with paint, wax or other substances onto, a rock surface’.<sup>7</sup> In a Scottish context this means carved stone boulders (Fig 7), slabs or surfaces, which may form part of natural bedrock, be earthfast or incorporated into a structure (they have an architectural function). The carvings usually originate in the Neolithic or Bronze Age, but are sometimes reused in later contexts. A newly recognised phenomenon, found in some



Figure 7 Prehistoric rock art in Scotland is found in a variety of contexts: this carved boulder forms part of a stone circle in Perth and Kinross.

<sup>5</sup> Ancient Monuments and Archaeological Areas Act 1979, section 5.

<sup>6</sup> Historic Scotland 1998 *Memorandum of Guidance*, 3.30.

<sup>7</sup> Bournemouth University and Institute of Archaeology 2000 *Rock Art Pilot Project*, 13.

Figure 8 Sculptures from Whithorn, Dumfries and Galloway, include evidence for the earliest documented Christians in Scotland, from the 5th century AD.



Neolithic tombs and houses, is so-called scratch art. A preliminary analysis suggests that there are at least 1,640 examples of prehistoric rock art in Scotland, about half the number of the known examples in Great Britain as a whole. By its very nature, much of this is in the open, predominantly in the countryside where it is vulnerable to a range of threats, not least erosion. Less than 10% of these are protected by scheduling.<sup>8</sup> Scottish prehistoric rock art encompasses enormous regional variety, as well as some of the most spectacular and important examples in the British Isles, some of which are in the care of Scottish Ministers. A recent assessment of the regional, national and international importance of rock art in Great Britain reveals its value both as an academic resource and as a highly visible and publicly accessible component of the historic environment.<sup>9</sup> We are beginning to explore with fellow British and international organisations how the needs of Scotland's prehistoric rock art might be addressed, sharing experience and good practice.

**1.6.2** Scotland possesses one of the richest bodies of early medieval carved stones in Europe and certainly the most diverse range to survive anywhere in the British Isles (symbol-incised stones, symbol-bearing cross-slabs, cross-slabs, cross-incised stones, free-standing crosses, shrines, hogbacks, architectural sculpture, etc). It provides a unique insight into the early medieval peoples of Scotland

and is critical to understanding the formative period of the Scottish nation (AD 450-1050). It is a rich vein of source material in a period with few written records. It provides insights into: the nature of pre-Christian ritual practices; the introduction of Christianity to Scotland and its impact on society; the relationship between secular and ecclesiastical authorities; the movement of different peoples speaking different languages into Scotland; the structure and evolution of early medieval society; and Scotland's place in the intellectual and cultural developments of this period, its intellectual horizons and contacts (Fig 8). There are estimated to be nearly 1,800 early medieval carved stones in Scotland, of which around 350 individual sculptures are scheduled ancient monuments (or form part of scheduled ancient monuments) in the care of Scottish Ministers and a further 180 or so are scheduled and in the care of others. Historic Scotland has produced a single Interpretation Plan for all the early medieval carved stones in our care with the aim of demonstrating how these monuments might be interpreted and presented to

<sup>8</sup> Scheduling is a passive form of protection, but scheduled ancient monuments are visited on 3-5 year cycles by Historic Scotland's Monument Wardens who assess the condition of the sites and try to persuade their owners to improve their condition with advice, and sometimes financial assistance, from Historic Scotland.

<sup>9</sup> Bournemouth University and Institute of Archaeology 2000 *Rock Art Pilot Project*, 47-51.

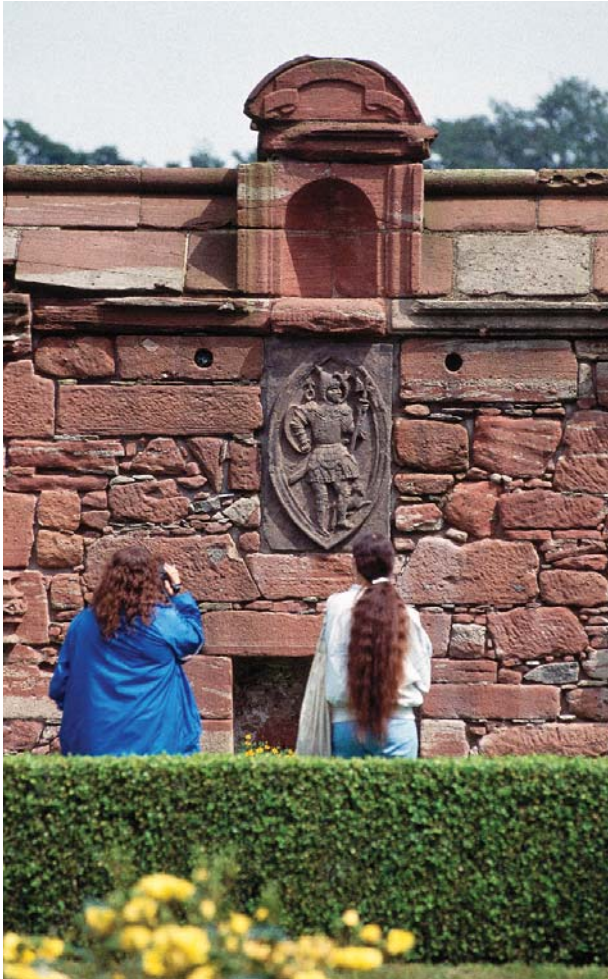


Figure 9 Gardens may also contain important Scotland, as here in the early 17th-century formal gardens at Edzell in Angus.

the public.<sup>10</sup> The NCCSS<sup>11</sup> is taking the lead in establishing what a 21st-century corpus of such carved stones should contain, an initiative that will be of relevance to other types of carved stones.

**1.6.3** In the later medieval period Scotland witnessed spectacular ecclesiastical and secular building campaigns (churches and castles, for instance), high status buildings that were often highly decorated. Scottish urban architecture also has its origins in this period. The majority of the surviving carved stones from this period therefore fall under the categories of architectural sculpture, architectural fragments and gravestones (see below), although garden sculpture (Fig 9) and public monuments, such as graveyard and market crosses, also date from this period.

**1.6.4** *In situ* architectural sculpture largely dates from no earlier than the medieval period (most Roman and all early medieval architectural sculpture to date has only been discovered *ex situ*; carved stone within prehistoric buildings is considered under the category of prehistoric rock

<sup>10</sup> Historic Scotland 2003a *Early Medieval Carved Stones in Historic Scotland's Care*; Foster 2005 forthcoming, Know your properties, recognise the possibilities.

<sup>11</sup> National Committee on Carved Stones in Scotland.

Figure 10 Aside from its artistic, historic and technological values, architectural sculpture often has particular merit as being one of the most useful means by which the dates of buildings can be most readily assessed in the absence of documentary sources, although this is usually on art-historical grounds rather than because the carving is dated: a dated lintel from a towerhouse at Greenknowe, Scottish Borders.





Figure 11 Gravestones are potentially one of the best guides to the activities of masons working in particular areas and are a unique source of evidence for regional variations: examples of West Highland medieval graveslabs from Kilmodan, Argyll and Bute.

art). It ranges from decorative items (such as finials from buttresses, canopies of decorative niches, blind tracery, arcading, etc) to moulded stones which have a definite architectural or structural function (such as window tracery, vault ribs, column shafts, etc). These types of carved stones are to be found in properties in care,<sup>12</sup> scheduled ancient monuments,<sup>13</sup> churches in use and other sites (Fig 10). This is a resource that has not been quantified.

**1.6.5** Architectural fragments are the large (but unquantified) assemblage of carved stone that were once part of the fabric of buildings but are now physically divorced from their former fabric (they are *ex situ*). Individually, or as assemblages, these may be very important indeed, adding a missing dimension to the understanding of how a building was used and what it originally looked like. Such carved stone is the direct responsibility of Historic Scotland when it is associated with properties in its care. All of our artefacts have entries in the Artefacts Collections Database maintained by our collections manager. Our knowledge of architectural sculpture has been enhanced since 1996 with the introduction of a programme of compiling site inventories.<sup>14</sup> These unpublished reports provide a snapshot in time of the condition of the collection and are valuable for tracking and

auditing purposes. Each stone has an identification number as a part of this process. Where specific carved stones or collections particularly merit further research, these have been identified. However, significant collections of architectural fragments can also be found throughout the country on sites in the care of others.

**1.6.6** Gravestones are likely to be the most numerous form of carved stone, although there are no statistics to prove this.<sup>15</sup> They are important for a very wide range of reasons. Often they are the only documents of ordinary people, they reflect the lives, beliefs and attitudes to death, burial and remembrance of past communities and individuals. They have enormous social significance as genealogical, epidemiological and historical records for a broad cross-section of the past population. An especially important element in the fabric of the historic environment of most local communities throughout Scotland, they can also retain modern symbolic and religious significance. The design and style of the gravestones is also of interest to art historians and can be appreciated by many (Fig 11). Their lettering is a unique cultural record that ranges from folk art to a highly skilled craft. In groups, as part of graveyards, gravestones contribute to the setting of important monuments and form historic landscapes in their own right.

**1.6.7** Historic Scotland has encouraged and sponsored the appointment of the Council for Scottish Archaeology's Carved Stones Adviser, whose primary aims relate to graveyards and gravestones. This project is intended to be a successful and ready means of delivering Historic Scotland's objectives with regard to graveyards and gravestones through contact with professionals, interested groups and individuals. Relevant Historic Scotland guidance includes the 2001 *Guide for Practitioners on Conservation of Historic Graveyards* and the 2003 series of *Electronic Leaflets on Graveyards and Gravestones*. To date, graveyard surveys have been undertaken at four of our properties in care.

<sup>12</sup> A monument that has been formally taken into the care of Scottish Ministers under the terms of the Ancient Monuments and Archaeological Areas Act 1979.

<sup>13</sup> A monument that has been protected under the Ancient Monuments and Archaeological Areas Act 1979.

<sup>14</sup> The Carved Stones Inventory Project has now recorded for the first time over 5,500 carved stones at some 40 properties in care. Copies of finished reports have been lodged in the Historic Scotland Library and NMRS. See also Mårkus 2003, Historic Scotland *ex situ* carved and moulded stones project.

<sup>15</sup> The number of graveyards that exist is being assessed by the RCAHMS in liaison with the CSA Carved Stones Adviser.

## **2.1 Legal protection**

**2.1.1** Significant examples of carved stones and their settings should be protected for the benefit of present and future generations. This will be achieved by 'scheduling' and 'listing' the most important examples and through the application of planning controls over them and their settings. The aim will be to ensure that full and effective use is made of the statutory powers available.

## **2.2 Raising awareness**

**2.2.1** As many people as possible and practical should have an opportunity to experience and learn about carved stones. The aim is to enhance understanding and enjoyment of a significant part of Scotland's cultural heritage, to promote an awareness of the threats to carved stones and to encourage wider participation in their active conservation.

## **2.3 Conservation strategies and practice, including intervention**

**2.3.1** Works to carved stones should conform with best conservation practice and standards, as set out in national and international guidance and charters. In particular, actions should be informed by a full assessment of the cultural significance of a carved stone and its associated site. The primary

aim of the conservation of carved stones should be to retain their cultural significance, and this should include provisions for their future needs, including security and maintenance.

**2.3.2** There should be a presumption in favour of the retention, where this is feasible and where permissible under the provision of treasure trove, of the physical association of a carved stone with its locality and setting.

## **2.4 Research and information**

**2.4.1** Historic Scotland should make guidance available to assist interested parties in the active conservation of carved stones, together with information about carved stones and what is important and interesting about them.

**2.4.2** Historic Scotland should carry out and promote research that is necessary to underpin best conservation, management, interpretation and presentation practices, as well as the wider development of these activities.

## **2.5 Historic Scotland setting example of best practice**

**2.5.1** Historic Scotland should ensure that all its work with carved stones follows best practice and sets an example for others to follow.

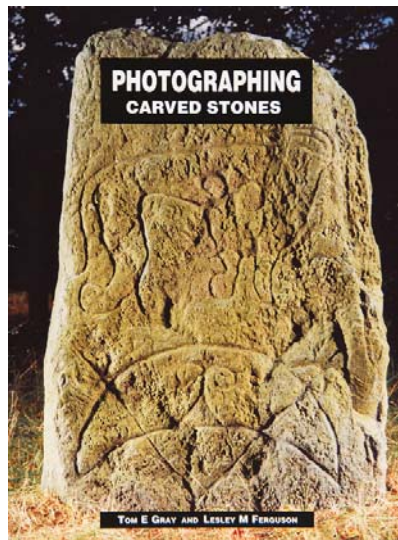


Figure 12 The National Committee on Carved Stones in Scotland encourages common approaches to the recording of carved stones, as with this publication. Crown copyright Historic Scotland, and by permission of Pinkfoot Press.



Figure 13 Historic Scotland monument wardens regularly check the condition of scheduled ancient monuments and discuss with the owners how this might be improved.

### 3.1 Legal protection

**3.1.1** Historic Scotland will continue to protect carved stones under existing legislation (see Appendix B).

**3.1.2** Historic Scotland will ensure that the range of carved stones within its own Estate is in accord with Scottish Executive existing policy for taking monuments into care.<sup>16</sup>

**3.1.3** Historic Scotland will encourage the Treasure Trove Advisory Panel (TTAP) to clarify ambiguities about the legal status of carved stones.<sup>17</sup>

### 3.2 Raising awareness

**3.2.1** Historic Scotland will support the work of the NCCSS and other relevant bodies in drawing attention to threats to Scottish carved stones of all periods, promoting their understanding and appreciation and encouraging common approaches to their recording and preservation (Fig 12).

**3.2.2** Historic Scotland aims to encourage all owners and third parties with an interest in carved stones to apply the principles and standards outlined in this document.

**3.2.3** Historic Scotland aims, through its Monument Warden Programme, to continue to encourage awareness in owners of scheduled carved stones of the threats to their monuments, the options for improved protection and management, and how they can help (Fig 13).

<sup>16</sup> At the time of writing this policy is under review.

<sup>17</sup> Treasure trove procedures are clear-cut for carved stones that are new discoveries; these must be reported to the TTAP (Scottish Executive 1999; [www.treasuretrove.org.uk](http://www.treasuretrove.org.uk)). Less transparent are requirements and best practice for known earthfast/wallfast carved stones that are to be moved on conservation grounds (and where Historic Scotland would hope that they would be relocated locally – see 4.3.5). Likewise, who owns and is responsible for the curation of known portable carved stones (ie carved stones that are not earthfast or wallfast)? In terms of treasure trove is there a legal distinction between a new discovery that is still earth- or wallfast and one that is already portable, etc?

### 3.3 Conservation strategies and practice, including intervention

**3.3.1** Historic Scotland aims to ensure that its own policies and guidance are accessible to all interested parties, in the interest of promoting best conservation practice.

### 3.4 Research and information

#### Research

**3.4.1** Historic Scotland recognises that ongoing research is necessary to underpin best conservation, management, interpretation and presentation of individual monuments, as well as to improve understanding and continue to develop these areas of activity.

#### Access to carved stones for research purposes

**3.4.2** If moving a carved stone at a property in care, which is normally not fully accessible, Historic Scotland will carry out, or facilitate, its full recording by the most appropriate method. This includes allowing the RCAHMS the opportunity to create a full record of all six faces of the carved stone. We also aim, in the interest of communication and the fullest possible recording, to advise the relevant local museum(s), council archaeologist, RCAHMS, relevant university departments and NCCSS when material is being

Figure 14 Historic Scotland is cataloguing the architectural fragments from its properties in care. This helps us to look after them and to better understand their significance: examples from Elgin Cathedral, Moray.

temporarily taken to and from our Conservation Centre in Edinburgh for conservation treatment. Other local and national parties will also be advised as appropriate.

#### Interpretation

**3.4.3** Historic Scotland aims to make Scotland's carved stones accessible to as wide an audience as possible, as well as encouraging others to do likewise.

#### Education

**3.4.4** Historic Scotland aims to encourage the use of carved stones as an educational resource by learners of all ages.

#### Provision of technical guidance and training

**3.4.5** Historic Scotland will aim to provide a range of information and guidance on carved stones for different audiences.<sup>18</sup>

### 3.5 Historic Scotland setting example of best practice

**3.5.1** Historic Scotland will seek to ensure that it follows its own guidance and continues to lead in the development and application of best practice and standards.

**3.5.2** Historic Scotland will seek to develop and maintain its own agenda, strategy and action plan for carved stones.

#### Properties in Care

**3.5.3** Historic Scotland aims to audit and record all significant carved stones in its care as part of its ongoing long-term programme of monument management planning. The audit will include a record of the condition of each carved stone at the time of survey.

**3.5.4** Historic Scotland seeks to monitor all carved stones in its care regularly, and take appropriate conservation action (e.g. at time of inventory compilation, collections auditing (Fig 14), annual works audit and management plan compilation and review).

<sup>18</sup> This conservation guidance is being reviewed and will be the subject of future publications and research strategies.



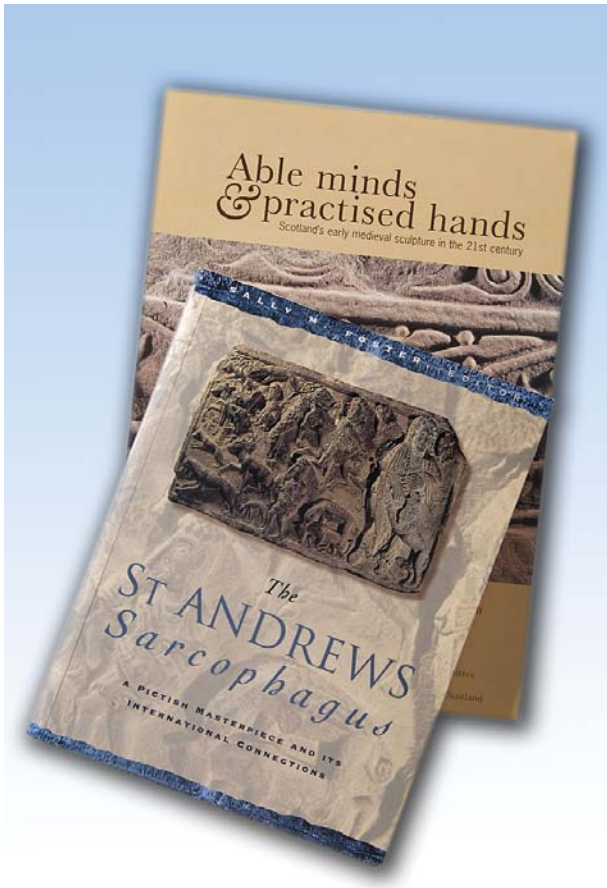


Figure 15 Examples of conferences and publications organised or sponsored by Historic Scotland, with partners.

**3.5.5** Historic Scotland aims to identify and address any outstanding training needs for its own staff.<sup>19</sup>

**3.5.6** Historic Scotland encourages the highest standards of multi-disciplinary research at properties in care and supports similar work elsewhere in Scotland.

**3.5.7** Historic Scotland publishes, and encourages others to publish, research relating to carved stones in its care (and elsewhere in Scotland) (Fig 15).

**3.5.8** Historic Scotland will make information relating to individual carved stones in its care available to its stewards and members of the public, both on and off-site.<sup>20</sup> Technical information held by the Historic Scotland Conservation Centre is available to appropriate parties on request. Historic Scotland will also make information regarding decisions affecting carved stones in its care available on request.

**3.5.9** Historic Scotland is devising general as well as site-specific interpretation plans for carved stones in its care. Where collections of architectural fragments survive they will be included in the interpretation plan for the whole property in care to ensure that their relevance is fully acknowledged. Collections from properties in care that are not curated by Historic Scotland will also be considered as part of the interpretation planning process.

**3.5.10** The interpretation Historic Scotland provides is underpinned by full knowledge of each monument. Significant gaps in knowledge will be identified and addressed as part of the interpretation planning process.

**3.5.11** Historic Scotland will link its interpretation of carved stones in its care to other related monuments, not necessarily in Historic Scotland care, where this is appropriate.

**3.5.12** Historic Scotland aims to produce education resource materials on the use of carved stones. This guidance will support learning and teaching across a wide range of subject areas in Scottish schools and will help develop informed attitudes of social and environmental responsibility inherent in education for citizenship.

**3.5.13** Historic Scotland aims to build on good practice in interpretation to encourage the educational use of carved stones by a wide range of audiences at its properties in care.

### Scheduled Ancient Monuments

**3.5.14** Historic Scotland continues to monitor the condition of scheduled carved stones through its Monument Warden Programme and use the information gathered from the monument warden reports to identify priorities for action.

<sup>19</sup> Staff in Historic Scotland Monument Conservation Units are trained in basic conservation methods, and this has also been extended to Society for the Protection of Ancient Buildings (SPAB) scholars and fellows, and other individuals. Appropriate training is also provided for monument wardens, inspectors and architects and as part of the continuing professional development of stone conservators.

<sup>20</sup> For example, through on-site catalogues, other publications, NMRS, Scottish Cultural Resources Access Network (SCRAN), etc. Historic Scotland also aims that its Collections Database will also become more widely available in electronic format.

## 4.1 Legal protection

**4.1.1** Local authorities can use existing legislation to extend appropriate protection to carved stones. For example, local authorities have the same powers as the Scottish Ministers to take ancient monuments into care (sections 11-16 of the Ancient Monuments and Archaeological Areas Act 1979 (the 1979 Act) refers) or to enter into management agreements with the occupier of an ancient monument (section 17). Local authorities also have an invaluable role to play in protecting the setting of monuments, whether scheduled or listed, through the planning process (see Appendix B).

## 4.2 Raising awareness

**4.2.1** People are encouraged to report a concern about an urgent and active threat to an important carved stone direct to the owner and the appropriate authority (Historic Scotland for scheduled ancient monuments, the local authority for the remainder).<sup>21</sup>

## 4.3 Conservation strategies and practice, including intervention

### Principle of minimum intervention

**4.3.1** The principles of minimum intervention and sustainability should apply in any conservation works associated with a carved stone. Interventions need to be justified on conservation grounds, appropriate, carefully considered, authoritatively based, properly planned and executed and, where possible, reversible. Historic Scotland, in liaison with others, provides guidance, including guidelines for treatment of specific categories of carved stones (see Further Reading).

Figure 16 The relationship of a carved stone to its cultural and natural setting is an important consideration during the conservation planning process. At Achnabreck, Argyll and Bute, trees surrounding the prehistoric rock art have been felled enabling the visitor to appreciate where the carvings sit in the landscape and why they might have been carved here.



<sup>21</sup> In the case of Category A listed buildings, the local authority needs to forward relevant enquiries to Historic Scotland.



Figure 17 At Kilmory Knap, Argyll and Bute, the medieval chapel has been sensitively reroofed to create a suitable shelter for a collection of early medieval and later sculptures gathered from the site.

### Assessment of significance and conservation strategies

**4.3.2** Conservation strategies for individual carved stones or collections (and their associated monument or landscape) should be determined by an understanding of their cultural significance and their conservation needs. The cultural significance of a carved stone is embodied in:

- its fabric, design, context and setting (Fig 16)
- in associated documents
- in its use
- in people's memories and associations with it ('social value').<sup>22</sup>

It is best understood by a methodical process of collecting and analysing all the relevant information, drawing on appropriate expertise. Significant gaps in knowledge should be identified and addressed so that conservation strategies are underpinned by appropriate inter-disciplinary research.

Conservation plan format should be adopted, where applicable (see Further Reading, e.g. for Management Plan format for graveyards).

**4.3.3** It is particularly important that the conservation strategy takes into consideration the relationship of the carved stone to its natural and cultural surroundings. Only rarely is a culturally significant carved stone self-contained within definite boundaries – there is usually a visible link to its broader environment, or the carved stone may be part of a larger monument or cultural landscape, all

or part of which contributes to an understanding of its historical context. Care of a carved stone may therefore sometimes involve actions outside the immediate (legal) boundaries around the carved stone, or be better addressed as part of a holistic approach to a monument or historic landscape (such as a graveyard).

**4.3.4** There is a presumption in favour of the retention of the physical association of a carved stone with its locality, where this is feasible. The importance of the precise present location to the overall significance of the carved stone and its site therefore requires careful assessment before any decisions are made about moving it. Where a carved stone which still possesses visible monumental qualities is believed to be *in situ* or in a place of significance, the presumption is that it will not be moved unless the importance of retaining it there is outweighed by demonstrable conservation needs that cannot be satisfied in any other way. Such considerations also need to take into account not simply archaeological and historical factors, but also social and economic ones. In the case of some carved stones that are found beneath the present ground surface, reburial may be the most appropriate course of action.

**4.3.5** Where it is in the best conservation interest of known carved stones that they are removed, it is normally preferable that they are located as close as possible to where they are being removed from, providing that curatorial needs can be satisfied (e.g. in an appropriate existing local structure or registered museum). Individual circumstances will dictate how 'local' local can be, but the expectation is that this would normally be associated with the same site or geographical area (Fig 17). It is advisable to check with the TTAP whether there are any legal implications for ownership before moving a known carved stone. New discoveries will certainly be subject to treasure trove procedures.

**4.3.6** If considering moving a carved stone, particularly if moving to a new structure, consideration needs to be given to:

- future public access to the structure and its contents, and how these can be displayed
- long-term responsibility for conservation of the carved stone, including regular monitoring and access to specialist conservation skills
- long-term stability and maintenance responsibilities of the structure housing the carved stone

<sup>22</sup> For social value see Jones 2004 *Early Medieval Sculpture and the Production of Meaning, Value and Place*.

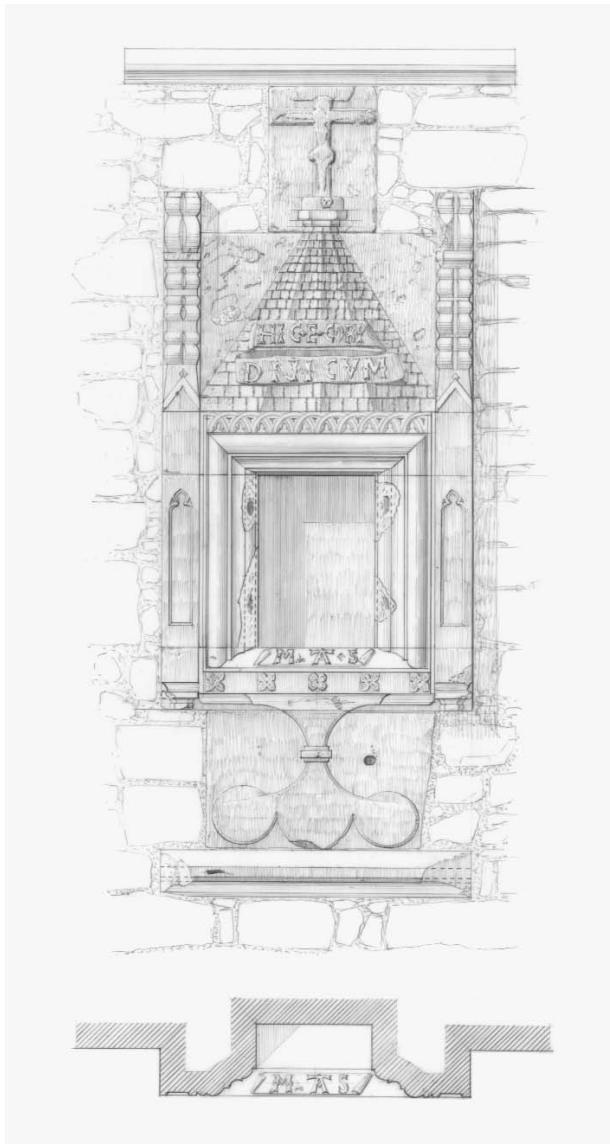


Figure 18 The RCAHMS continues to produce detailed record drawings of carved stones of all periods: the early 16th-century sacrament house at Auchindoir, Aberdeenshire. Crown copyright: RCAHMS.

- how the carved stone can be safely relocated, both with reference to the carved stone itself and the health and safety of those persons involved in the project.<sup>23</sup>

### Importance of recording

**4.3.7** Full recording is encouraged, especially where continued preservation is no longer possible or where unavoidable loss is taking place through change or ongoing decay (Fig 18). The aim should be to prioritise those carved stones known to be most at risk. Of these, the better surviving carved stones should have priority over poorly preserved examples, unless the latter are typologically

<sup>23</sup> For Health and Safety guidance in the context of graveyards and gravestones see Historic Scotland 2003b Electronic Graveyard and Gravestone leaflets 4, 5 and 6.



Figure 19 The 9th-century Dupplin Cross is removed for conservation and relocation in 1998. Prior to this the surrounding area has been excavated by professional archaeologists seeking evidence for the history of its use on this site.

important (this requires assessment by those with appropriate expertise).

**4.3.8** Rubbings or squeezes should only be made of carved stone surfaces in very exceptional circumstances; chalks or other substances should not be applied to the surface to enhance their visual appearance, however temporarily. In those exceptional circumstances where rubbing may be desirable for recording purposes, the correct protocol should be followed (see Appendix C). With regard to laser scanning, this requires specialist consideration of the possibility that it will alter the archaeo-luminescent status of the surface layers of the stone (it has been suggested that this may affect future dating potential).

**4.3.9** Stones should be fully recorded in advance of their removal or enclosure in order to recover information relating to construction, erection, functions (including secondary uses) and broader landscape and historical context. Full archaeological provision should be made for any disturbance of the ground associated with the relocation of a carved stone (Fig 19).

Understanding the immediate context from which a carved stone comes will usually entail exploration of an area larger than that strictly necessary to lift the carved stone. The research, excavations, publication and archives should be to an appropriate



Figure 20 The conservation of carved stones requires the skills of a professional stone conservator: work on the Howmore armorial panel from South Uist, Western Isles.

professional standard, in line with Historic Scotland operational policy on publication and archiving.

### Treatment of surfaces

**4.3.10** As a general rule, carved stones should only be cleaned when the need has been identified and this will not harm the stone. Even gentle brushing with a soft bristle brush and rinsing with clean water has the potential to cause irreversible damage to porous stone. Cleaning should be undertaken by a professional conservator (Fig 20).

**4.3.11** Many lichens cause no damage to stone and may, in some circumstances, have a protective effect. Some do cause damage and their growth on important carved stones should be monitored and controlled. Some lichens are rare so the advice of a lichenologist should be sought before removing lichen or relocating a stone with lichen growth, since change in orientation and light conditions can kill lichen. It is also necessary to check in advance whether the type of lichen is protected by law.

**4.3.12** Moss can have a protective effect, especially on flat carved stones, and should only be removed where there is clear evidence that the growths are having a detrimental effect on the integrity of the stone (e.g. they are causing enhanced deterioration or increased frost damage). However, it is advisable to remove moss from the top surfaces of sandstone upright stones, such as gravestones, to prevent the downward penetration of roots (root damage will depend on how hard the stone is).

**4.3.13** Carved stones, including gravestones or gravestone inscriptions, should not be painted as this may harm the stone. Where there is evidence that paint was applied as an original feature, seek professional advice from a conservator before re-painting.

**4.3.14** Seek specialist advice to deal with graffiti as inappropriate treatment can cause irreversible damage.

**4.3.15** Research into the effects of the use of biocides on stone is still ongoing<sup>24</sup> so it is difficult to say yet whether their application to carved stones is advisable. Published research to date has confirmed that the efficacy of biological applications was generally limited, that health and safety considerations need to be fully taken into account and the need to consider other methods of controlling biological growths.<sup>25</sup>

**4.3.16** Where an inscription has been lost from a gravestone, recutting the stone should not be undertaken. It is preferable to position a plaque, with new, additional or existing text reproduced, in the ground at the front of the original tombstone.

### Buried stones and deturfing

**4.3.17** Deturfing of buried carved stones is not normally recommended because of the potential to do more harm than good to the condition of the stone and its immediate surroundings. The Carved Stone Adviser Project is developing a protocol for temporary deturfing of non-scheduled gravestones in advance of recording.<sup>26</sup> Any new discoveries must be reported to the TTAP (see Appendix A).

### Design of shelters

**4.3.18** Protective shelters or enclosures for carved stones should be designed to create the correct internal environment for the carved stone with due regard for the surrounding conditions and location. A stone conservator should be consulted on the relocation of carved stones into any different environment in order that future potential problems from soluble salts, etc can be addressed before

<sup>24</sup> A European partnership project involving Historic Scotland, Biodam, is researching how to control biological growths on stone: <http://biodam.biogema.de/>.

<sup>25</sup> Cameron *et al* 1997 provides the best source to go to for information on the complexities of controlling biological activity on stone.

<sup>26</sup> See [www.scottishgraveyards.org.uk](http://www.scottishgraveyards.org.uk)



Figure 21 Shelters for carved stones need to balance protection of the monument with allowing as much public access as possible: Sueno's Stone, Moray, a 9th-century cross-slab illuminated at night.

damage occurs. The design of shelters should allow for as much visibility of all sides of the monument as possible. The security of the structure and the carved stones that it houses is also paramount (Fig 21).

### Use of replicas and markers

**4.3.19** Carved stones that are to be moved can be replaced with an appropriate replica (which should be clearly labelled as such) or marker. Replicas should be created using techniques that are non-destructive of the original fabric. Moulds and casts from carved stones should not normally be undertaken since such techniques may cause damage to the stone surface. Alternative routes towards replication should be sought, such as 3D laser scanning. In the exceptional circumstances when casts are made, this should only be undertaken by a professional conservator after assessment of whether this will harm the carved stone and of the most suitable techniques to be used. Prior permission is needed to make casts from scheduled ancient monuments.



Figure 22 The modern replica of a Pictish cross-slab at Hilton of Cadboll, Highland, is sited away from the most archaeologically sensitive parts of the site.

**4.3.20** Replicas and markers need to be dated in a permanent manner, i.e. self-documenting modern monuments. A replica will not involve any conjectural restoration, while accompanying interpretation ought to make it clear that what is seen is a replica and how its form relates to the original.

**4.3.21** Where the site of an above-ground carved stones is significant (if in their primary position or the cultural significance of the secondary location can be demonstrated) any replica should normally be sited where the carved stone has been removed from. Where the original location of the carved stone is not known or there will be an adverse impact on other cultural heritage values (such as archaeological remains or the setting of a monument), it may be more appropriate to site the replica elsewhere. However, its location, form and orientation should still be informed by the prevailing understanding of such monuments. Prior archaeological evaluation of the site of the replica may be required (Fig 22).



Figure 23 Mounting sculptures, particularly when highly fragmentary, is an enormous challenge if the carved stone is not to be damaged in any way: St John's Cross, Iona.

## Long-term monitoring and maintenance

**4.3.22** Carved stones, particularly those not in museums, require regular programmes of monitoring and maintenance.

**4.3.23** The effects of any interventions to carved stones should also be monitored so that this knowledge can be disseminated and fed into future conservation strategies.

## Skills for the job

**4.3.24** It is important that those working on carved stones should have the appropriate training, skills and experience for the job.

## Mounting

**4.3.25** Where carved stones require to be made structurally stable by placing them on a mount, this should not involve any physical destruction or abrasion of the fabric of the stone. Mountings for carved stones should be sympathetically designed and constructed so as to facilitate the easy removal of the carved stone at any time for conservation treatment or maintenance of the surrounding fabric (Fig 23). Cushioning should be provided as an

interface between a metal support and carved stone to prevent abrasion damage. If metal is being used for brackets, non-ferrous metals (and 316 stainless steel) are recommended for outside or humid conditions; in a dry internal environment a coated mild steel may be acceptable. A stone conservator should always advise on what is appropriate.

## Storage

**4.3.26** Carved stones should be stored in such a way that they are secure and free from inadvertent damage, yet as publicly accessible as possible. Stones placed in storage should be isolated from one another and be protected from any external influences that might affect their long-term preservation. The storage environment itself should also be conducive to their long-term preservation.

## Reforming or joining carved stones

**4.3.27** Where presentation and mounting of the carved stone requires parts of the stone to be reformed, or stone fragments to be joined, the modern fabric should be self-documenting (the monument can tell its own story without recourse to written documents), identifiable on close inspection, and should not be aesthetically invasive or disturb the coherence of the whole. The compatibility of the material used in the repair should be well researched. Reconstruction (through the addition of new material) of even limited parts of a carving should generally be avoided unless there is clear evidence upon which to base all elements of this and its presence will directly aid consolidation and presentation of the sculpture in question.

**4.3.28** Repairs of gravestones will require the use of non-ferrous dowels of suitable length and either a thixotropic resin (for clean breaks) or lime mortar (for wider joints). For repairs to stone, hard cement mortars should be avoided and lime mortar only used. Lifting stones must only be carried out under specialist supervision and it should be recognised that friable stones are liable to break-up if lifting is attempted.<sup>27</sup>

## Portable carved stones

**4.3.29** Theft is a serious risk to portable carved stones that are not in a secure and supervised

<sup>27</sup> See Historic Scotland 2003b Graveyard and Gravestones Electronic Leaflet 6.



Figure 24 Portable carved stones are at risk unless properly curated, and even the tiniest fragment can be highly significant: Anglo-Saxon carved stone from Jedburgh Abbey, Scottish Borders.

location. Significant collections of vulnerable portable sculptures can be found throughout Scotland (Fig 24). Owners and others with responsibility for the cultural heritage in their areas are encouraged to address this issue, which Historic Scotland addresses at our properties in care through an active programme of collections management.

#### 4.4 Research and information

##### Research

**4.4.1** Research underpins best conservation, management, interpretation and presentation practice.

**4.4.2** Research into carved stones should employ non-destructive techniques (visual assessment, laser scanning, magnetic susceptibility and x-ray diffraction, for example, taking into account concerns about loss of archaeo-luminescent information). Only in exceptional circumstances, and when there is no threat to the long-term significance or conservation of the carving in question, should any form of destructive analysis, however minor, be considered. Any cores and samples require documentation and long-term curation to ensure availability for future scientific study.

##### Interpretation

**4.4.3** Making carved stones accessible to as wide an audience as possible applies not just to people who are able to visit carved stones for themselves (there is no substitute for experiencing the original and authentic remains), but also to those dependent on remote access. Such interpretation should be

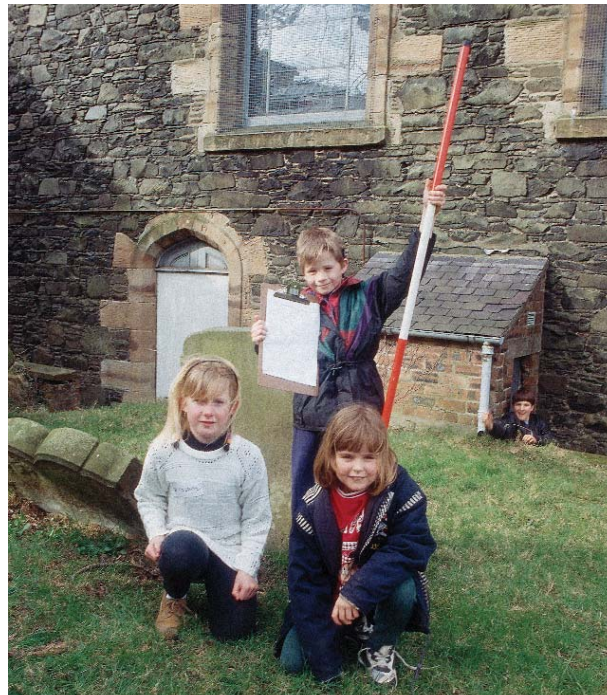


Figure 25 Carved stones are of high educational value: Council for Scottish Archaeology Young Archaeologists Club records a graveyard in Stranraer, Dumfries and Galloway. Copyright CSA.

designed to meet the needs of all, including people with disabilities that might make visiting or appreciating the originals difficult (e.g. provision of copies that can be touched or off-site interpretation).

##### Education

**4.4.4** The social, historical, architectural and artistic interpretation of carved stones, whether *in situ* or *ex situ*, provides not only the capacity to support formal learning and teaching in Scottish schools across a range of subject areas, but also the inspiration for a variety of community-focused lifelong learning initiatives. Learning about distinctive local heritage can be placed in a national context, thus heightening awareness of the important contribution local heritage makes to our understanding of national identity and culture. Furthermore, it can help engender a sense of pride in the local community which may contribute to the longer term conservation of carved stones for future generations (Fig 25).

##### Provision of technical guidance and training

**4.4.5** Historic Scotland recognises the value of involving as many people as possible in caring for their local heritage of carved stones. To be effective and provide best value for money, support, training and co-ordination are required, as well as the identification of local priorities for action.

# A

## Aspects of ownership of carved stones

Non-earthfast and non-wallfast carved stones are portable antiquities and capable of being claimed under Scots common law as treasure trove, whereas established earthfast/wallfast stones are potentially heritable and may belong to the owner of the ground/building so long as they remain *in situ*. Stones in the non-earthfast/wallfast category must be declared to the Crown for consideration as treasure trove. For details of the treasure trove system and how to declare objects see [www.treasuretrove.org.uk](http://www.treasuretrove.org.uk).

Ownership of carved stones on ecclesiastical sites has been problematic. Examples include re-appropriation of medieval carved stones for more recent gravemarkers with present day ownership claimed by the families on whose plots the stones now lie.

Gravemarkers are owned by those who erected them or by their descendants. Rarely, even in the case of recent gravemarkers, can owners be readily traced and this creates problems with regard to responsibility and permission for action. The Church of Scotland Property and Endowment Act 1925 is unclear on where responsibility for gravestones lies and there is little accessible test case information to draw upon.

The 1925 Act passed ownership and responsibility for parish burial grounds from the heritors of parishes to parish councils, a responsibility later transferred to the local authorities. Property rights and responsibilities for parish churches and churchyards passed to the Church of Scotland Trustees. Since these transactions did not necessarily involve formal legal conveyance, it is sometimes difficult to get anyone to accept responsibility for a site which may include carved stones additional to gravestones (see above).

New discoveries of portable carved stones may come under the category of treasure trove and require to be declared to the Crown so that it has

the opportunity to claim them. In such circumstances, and if claimed, the Treasure Trove Advisory Panel (Historic Scotland's Finds Disposal Panel for finds from Historic Scotland-funded excavations) advises the Queens and Lord Treasurer's Remembrancer to which Registered Museum (in Scotland Registration is administered by the Scottish Museums Council) Crown-claimed material should be disposed. There is a presumption that where an institution already holds part of an object or the main collection from the same site that it will be allocated new discoveries from it. Museums may also make bids for material that fills a significant gap in their formal Collecting Policy (as ratified by the Scottish Museums Council).

## B

## Aspects of legal protection of carved stones

Both the Ancient Monuments and Archaeological Areas Act 1979 (the 1979 Act) and Planning (Listed Buildings and Conservation Areas) (Scotland) Act 1997 (the 1997 Act) apply to the legal protection of carved stones.

Under the 1979 Act Scottish Ministers can include in the Schedule any monument which appears to them to be of national importance. A scheduled monument is defined in section 1(11) as any monument which is for the time being included in the Schedule. To be considered as a scheduled monument a 'site' first needs to constitute a 'monument' under the definitions offered in sections 61(7)-(11) of the Act. For instance, Scottish Ministers may schedule under section 61(7)(c): *any site comprising, or comprising the remains of, any vehicle, vessel, aircraft or other movable structure or part thereof*, provided under 61(8)(a): *the situation of that object or its remains in that particular site is a matter of public interest*.

Section 61(8) of the 1979 Act does not permit the scheduling of a church in ecclesiastical use. This would include a carved stone that was moved into it and becomes heritable. Even if the carving is portable its site is still schedulable (section 61(7)9c) if the situation of that object or its remains in that particular site is a matter of public interest (section 61(8)(a)). Section 1(4) does not allow (re-) scheduling if the monument is moved to a location which is occupied as a dwelling house, other than by a custodian or their family. In practical terms this means that it is important before moving a carved stone to a church or dwelling house where it cannot be (re-) scheduled to be confident that this is a secure curated environment in which the long-term protection and conservation of the monument can be ensured (see below).

Our practice has been not to reschedule when a monument has gone to a secure curated environment, where a responsible and suitably skilled organisation has taken over care and

management of the object. If the new location is not deemed to be secure and curated the monument would normally be rescheduled in its new location so that adequate attention can be paid to the future well-being of the monument.

In practice Historic Scotland has tended only to apply the legislation to carved stones that are fixed in some way to the ground or to a structure and therefore immovable, meaning they can be appropriately recorded in the Register of Sasines (a record since 1617 of all transfer of ownership or heritable property in Scotland). This is because the relationship to the place formally scheduled can be clearly established. Although not legally tested, there tends to be the presumption that if material which was fixed is moved it loses its formal protection under the ancient monuments legislation.

When it comes to gravestones, the only way to be sure whether a scheduled area includes these is to check with Historic Scotland. They are normally included unless the wording of the scheduling description specifically excludes them.

In the case of places that are both scheduled and listed section 55 of the 1997 Act (related to listed buildings) disappplies certain sections of the Act where the site is also scheduled, thus only scheduled monument consent is required, not also listed building consent.

Under the 1997 Act carved stones which are entire entities, such as gravestones, milestones and sundials, can be listed in their own right as 'man-made structures'. Carved stones which are not listed in their own right may also be covered under the Act if they date to before 1 July 1948 and are lying directly in a functionally related hinterland of a listed structure in the same ownership at the time of listing. Churchyards and the gravestones and monuments within them are often listed, and accordingly listed building consent would be required for any alterations which affect the historic

or architectural character of the structures. The conservation area part of the 1997 Act is not relevant to carved stones in their own right, but the legislation does require the advertising of applications for planning permission within a conservation area.

The Town and Country Planning (General Development Procedure (Scotland) Order 1992) Amendment Order 1994 requires local authorities to consult Scottish Ministers through Historic Scotland about any proposal that might affect the setting of a scheduled ancient monument or category A listed building, amongst other issues.

Carved stones may form part of a place included on the *Inventory of Gardens and Designed Landscapes in Scotland (1987)*<sup>28</sup> and its supplementary volumes. Places included on the Inventory are subject to the statutory consultation provisions of the Town and Country Planning (General Development Procedure) (Scotland) Order 1992, whereby local authorities must consult Scottish Ministers, through Historic Scotland and Scottish Natural Heritage, in respect of any proposal which requires planning consent involves or may affect Inventory Sites.

<sup>28</sup> Historic Scotland 1998.

## C

# Interim guidance for rubbing carved stones for scientific purposes

Many people make rubbings of carved stones for recording or other purposes. However, this can damage them and there should be a presumption against rubbing, apart from in exceptional circumstances. The prior written consent of Scottish Ministers, known as scheduled monument consent, is required in the case of scheduled ancient monuments. There may be circumstances on scientific grounds when producing a rubbing of a stone will inform the recording and hence interpretation of the monument in question. However, the carved stones are often very delicate and this technique can harm the sculpture. Rubbing should not be done where suitable rubbings already exist, or if to rub the stone might run the risk of causing irreversible damage to the carved surface in question. The following is therefore recommended.

1. Non-contact methods for recording are the preferred first option (i.e. techniques of recording that involve no physical contact with the surface of the stone in question). Consider carefully why a rubbing is needed as opposed to any of the other many existing recording techniques. What is it about this particular carved stone that means that these other techniques are not suitable or adequate?
  2. Find out what rubbings already exist and whether in fact these already meet your purpose (the starting point should be the National Monuments Record of Scotland - see [www.rcahms.gov.uk](http://www.rcahms.gov.uk) - and local Sites and Monuments Record). It is important if rubbings are undertaken that these are not repeated unnecessarily because of the risk to the stone surface.
  3. Ensure that you have the owner/occupier's permission for a rubbing being undertaken.
  4. Find out if the carved stone is scheduled (check PASTMAP on [www.pastmap.org.uk](http://www.pastmap.org.uk) or contact Historic Scotland if you do not have access to the web). It is an offence to damage or deface a scheduled ancient monument and prior consent is needed from Historic Scotland before undertaking works, such as rubbing, on scheduled ancient monuments and properties in care.
  5. Check that the stone surface will not be harmed by the rubbing being undertaken by getting professional advice from a stone conservator. The temptation to clean the surface of the stone, other than by hand-picking of loose vegetation, should be avoided since even light brushing can damage the surface of the stone. Again, seek the advice of a professional stone conservator if further cleaning is thought to be essential. The Historic Scotland 1999 *Assessment Methodology* is a useful start to considering the condition of the stone, but cannot be used for reliable self-assessment of surface condition. If in any doubt, do not consider performing the rubbing.
  6. Ensure that the technique of rubbing follows best practice in terms of technique and performance. See for instance Kallhovd and Magnusson 2000 *Rock Carvings in the Borderlands or the Swedish RockCare project*: [www.raa.se/rockcare](http://www.raa.se/rockcare).
  7. The number of rubbings taken should be strictly limited to what is required to achieve a full record.
  8. Ensure that your rubbings or a copy of your rubbings are lodged formally in a publicly accessible archive, such as the NMRS (see [www.rcahms.gov.uk](http://www.rcahms.gov.uk)) and their production is reported in *Discovery and Excavation Scotland* for the year in question (contact Council for Scottish Archaeology).
- Full details of all organisations cited above can be found in the Contacts for Further Information section of this document.

## D

## Sources of Historic Scotland funding for carved stones

**1. Routine Maintenance**

Historic Scotland grants are not a substitute for the routine works of maintenance that a local authority or other responsible owner should undertake at sites, including graveyards, which it is responsible for.

**2. Timing of grant-aided works**

No work funded by Historic Scotland should begin on site until all necessary associated consents for the work have been obtained, regardless of whether or not a site has any form of legal protection.

**3. Conservation Plans**

We recommend the preparation of a Conservation Plan as part of any application for funds. This is a structured way of thinking about a site to assess why it is significant, and what should be done as a result of this significance. For advice on the preparation of a conservation plan see the free booklet *A Guide to the Preparation of Conservation Plans*. A conservation plan can be particularly useful for graveyards where there may be many elements of significance – archaeological, architectural, natural and historical – all of which will need to be retained. *Conservation of Historic Graveyards. Guide for Practitioners 2* Appendix B contains a conservation plan template tailored for graveyards.

Conservation Plans are a prerequisite for HLF funding.

**4. Ancient Monument Grant**

Although there is much competition for the funds available, Ancient Monument Grant may be available for one-off works aimed at conserving monuments, including for an important carved stone. Applications can be made by the owner, or a third party who has the consent of the owner to undertake works. In the first instance, contact

Historic Scotland and ask for the appropriate ancient monument inspector for the area concerned (write or ring 0131 668 8600; in the case of prehistoric rock art or Roman carved stones ask for the field monument inspector for the council area concerned; for the remainder ask for the standing building inspector).

Ancient Monument Grant can be used to subsidise conservation works of a specialist nature that extend beyond routine maintenance (see above).

A free leaflet, *Grants for Ancient Monuments. A Guide to Grants Available for the Preservation, Maintenance and Management of Ancient Monuments* is available.

**5. Management Agreement**

A Management Agreement is an option for long-term or repeated work at an ancient monument. It can embrace one-off works, but will always include maintenance works that need to take place over an extended period. A Management Agreement must be with the owner (or tenant) of the land in question. An interested party should consult the ancient monument area inspector for the monument concerned.

**6. Historic Building Repair Grant**

Historic Scotland can award grants for works of conservation and repair to structures which are assessed as of *outstanding* architectural and/or historic interest and structures within a conservation area classified as outstanding. Most commonly, in the context of graveyards, these are for repairs to mausolea and boundary walls. Competition for grant assistance is very keen but further particulars can be obtained from the Grants Enquiry Section of Historic Scotland (tel: 0131 668 8801 or e-mail at [hs.grants@scotland.gsi.gov.uk](mailto:hs.grants@scotland.gsi.gov.uk)).

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## Further reading

\* indicates recommended reading for someone new to these subjects.

Unpublished or internal Historic Scotland documents cited below are available on request.

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All Historic Scotland publications cited here, including free leaflets, are available from [hs.conservation.bureau@scotland.gsi.gov.uk](mailto:hs.conservation.bureau@scotland.gsi.gov.uk) (Telephone 0131 668 8638). This includes *Heritage Guide 2: The Carved Stones of Scotland. A*

*Guide to Helping in their Protection* (free), *Conservation of Historic Graveyards: Guide for Practitioners 2* (£19.50) and *The Conservation of Architectural Ancient Monuments in Scotland: Guidance on Principles* (£5.50).

A part of the Historic Scotland website is devoted to carved stones: [www.historic-scotland.gov.uk](http://www.historic-scotland.gov.uk). Electronic Graveyard and Gravestone leaflets can be downloaded from here.

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www.churchmonumentsociety.org Church  
Monuments Society  
www.csad.ox.ac.uk/BES British Epigraphy Society  
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## GRAVESTONES (AND GRAVEYARDS)

\*www.carvedstonesscotland.org for general  
information and guidance tailored for Scottish  
audience by the Council for Scottish Archaeology  
Carved Stones Adviser Project. This includes a  
bibliography of articles on gravestones and  
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For guidance on management plans for graveyards  
see Maxwell *et al* 2001.

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4 Health and Safety (H&S): guidance for visitors  
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6 H&S: guidance for cemetery managers and work  
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# Contacts for further information

## SUMMARY OF WHO TO CONTACT FOR WHAT

Contact details follow below.

The starting point for **information about specific carved stones** is the National Monuments Record of Scotland (NMRS), which is part of the Royal Commission on the Ancient and Historical Monuments of Scotland (RCAHMS) ([www.rcahms.gov.uk](http://www.rcahms.gov.uk) for CANMORE and PASTMAP) or your local Sites and Monuments Record (maintained by the local archaeological service – see below). CANMORE allows you on-line access to the database of the RCAHMS. The database contains details of many thousands of archaeological sites, monuments, buildings and maritime sites in Scotland together with an index to the drawings, manuscripts and photographs in the collections of the RCAHMS. CANMORE enables this data to be searched by location (place name, area or Ordnance Survey 1:10,000 map sheet), by type (the classification or function of a site, monument or building) or by keyword.

You can obtain **images** of individual carved stones from the RCAHMS and also through the photographic libraries of the National Museums of Scotland and Historic Scotland.

There is much you can do to help, particularly in the **recording** of carved stones. You will probably be able to do this most effectively through membership of a national or local society. For information on local societies in your area contact your local museum, the Council for Scottish Archaeology ([www.britarch.ac.uk/csa](http://www.britarch.ac.uk/csa)) or the RCAHMS. For more information about Scottish carved stones, as well as links to research projects and other relevant groups, see the website of the National Committee on Carved Stones in Scotland ([www.carvedstonesscotland.org](http://www.carvedstonesscotland.org)). For information on recording of graveyards and gravestones in particular see [www.scottishgraveyards.org.uk](http://www.scottishgraveyards.org.uk). The RCAHMS is a good source of advice on standards

for **recording of carved stones for survey, record and archive** purposes; Historic Scotland for **recording for assessment and monitoring of condition**.

If the **conservation** of particular carved stones interests or concerns you, bear in mind there is a possibility that the carving may have **legal protection**. For advice and any necessary permission that may be required before undertaking any works, you should contact Historic Scotland for **scheduled sites** and the local authority conservation officer for **listed sites** and **conservation areas**. For details of what is scheduled or listed you should consult PASTMAP ([www.pastmap.org.uk](http://www.pastmap.org.uk)), an electronic, map-based source of information. In the case of Category A listed buildings, the conservation officer will be able to advise you whether or not you need to contact Historic Scotland. If a carving is neither scheduled nor listed your first contact for conservation advice is your local archaeological service, local authority conservation officer or local museum. General guidance on **technical conservation** issues relating to the conservation of carved stones is available from Historic Scotland (see Further Reading), advice on **stone conservators** from Scottish Conservation Bureau.

To **report a problem** with a carved stone that is not in a museum you are advised to contact the local authority archaeologist, or Historic Scotland if you already know the monument is scheduled.

For information on **Historic Scotland grants**, see Appendix D.

**New discoveries** and queries about **treasure trove** should be directed to the Treasure Trove Advisory Panel ([www.treasuretrove.org.uk](http://www.treasuretrove.org.uk)).

For generic guidance on **interpretation and presentation** of monuments see the publications of Interpret Scotland ([www.interpretscotland.org.uk](http://www.interpretscotland.org.uk));

see also Further Reading for details of Historic Scotland's own initiatives with carved stones.

## LOCAL AUTHORITY CONTACTS

To contact a local authority conservation officer you can either get in touch with your local authority direct or find out who to contact through the Administrative Secretary, Institute of Historic Buildings Conservation (IHBC) (Scotland), c/o The Glasite Meeting House, 33 Barony Street, Edinburgh, EH3 6NX, e-mail [alison@gbpt.org](mailto:alison@gbpt.org). Further information on [www.ihbc.org.uk/](http://www.ihbc.org.uk/) Note: not all local authorities are served by members of IHBC.

For full details of local archaeological services either ring your Council Offices, or consult [www.britarch.ac.uk/csa/otherorgs\\_arcs.html](http://www.britarch.ac.uk/csa/otherorgs_arcs.html).

In summary, local archaeological services are provided as follows:

### **Aberdeen City**

Judith Stones 01224 523 658  
e-mail: [Judiths@arts-rec.aberdeen.net.uk](mailto:Judiths@arts-rec.aberdeen.net.uk)

### **Aberdeenshire, Moray, Angus**

Aberdeenshire Archaeology Service (Ian Shepherd)  
01224 664 723  
e-mail: [ian.shepherd@aberdeenshire.gov.uk](mailto:ian.shepherd@aberdeenshire.gov.uk)

### **Argyll and Bute, City of Glasgow, East Ayrshire, East Renfrewshire, Inverclyde, North Ayrshire, North Lanarkshire, Renfrewshire, South Ayrshire, South Lanarkshire, West Dunbartonshire, West Lothian**

West of Scotland Archaeology Service 0141 287 8332/3  
e-mail: [enquiries@wosas.glasgow.gov.uk](mailto:enquiries@wosas.glasgow.gov.uk)

### **Clackmannan, Stirling**

Lorna Main 01786 442 752  
e-mail: [mainl@stirling.gov.uk](mailto:mainl@stirling.gov.uk)

### **Dundee City**

No archaeological provision, but note Dundee Historic Environment Trust, Adam Swan 01382 902244  
e-mail: [adam.swan@dundeecity.gov.uk](mailto:adam.swan@dundeecity.gov.uk)

### **Dumfries and Galloway**

Jane Brann 01387 260 154  
e-mail: [janeb@dumgal.gov.uk](mailto:janeb@dumgal.gov.uk)

### **East Lothian, Midlothian**

Biddy Simpson 01620 627158  
e-mail: [bsimpson1@eastlothian.gov.uk](mailto:bsimpson1@eastlothian.gov.uk)

### **Edinburgh, City of**

John Lawson 0131 558 1040  
e-mail: [John.Lawson@cecas.freeserve.co.uk](mailto:John.Lawson@cecas.freeserve.co.uk)

### **Falkirk**

Geoff Bailey 01324 503 783  
e-mail: [geoff.bailey@falkirk.gov.uk](mailto:geoff.bailey@falkirk.gov.uk)

### **Fife**

Fife Archaeology Service (Douglas Speirs) 01592 416 153  
e-mail: [Douglas.Speirs@fife.gov.uk](mailto:Douglas.Speirs@fife.gov.uk)

### **Highland**

Highland Archaeology Service 01463 702 250  
e-mail: [archaeology@highland.gov.uk](mailto:archaeology@highland.gov.uk)

### **Orkney**

Orkney Archaeological Trust (Julie Gibson) 01856 569 341  
e-mail: [oat@lineone.net](mailto:oat@lineone.net)

### **Perth and Kinross**

David Strachan 01738 477 080  
e-mail: [DLStrachan@pkc.gov.uk](mailto:DLStrachan@pkc.gov.uk)

### **Scottish Borders**

Scottish Borders Archaeology Service (John Dent) 01835 826 513  
e-mail: [jdent@scotborders.gov.uk](mailto:jdent@scotborders.gov.uk)

### **Shetland**

Shetland Amenity Trust (Val Turner) 01595 694 688  
e-mail: [val@shetlandamenity.org](mailto:val@shetlandamenity.org)

### **Western Isles**

Mary MacLeod 01851 643251  
e-mail: [mary-macleod@cne-siar.gov.uk](mailto:mary-macleod@cne-siar.gov.uk)

### **East Dunbartonshire**

No Council Archaeology Service.

## OTHER USEFUL ORGANISATIONS

### **Association of Burial Authorities**

139 Kensington High Street, London W8 6SU.

Tel: 020 7937 0052

ABA represents the interests of organisations engaged in the management and operation of burial grounds. It has taken on some of the functions of the Memorial Advisory Bureau and is a useful source of advice on conservation and maintenance issues in churchyards and cemeteries.

### **Church of Scotland Committee on Artistic Matters**

121 George Street, Edinburgh, EH2 4YN.

Tel: 0131 225 5722; Fax: 0131 220 3113.

The Church of Scotland Committee on Artistic Matters is a standing committee of the General Assembly of the Church of Scotland. All works, internal and external, affecting the appearance of a church in the care of the Church of Scotland require the permission of this Committee before taking place.

### **Confederation of Burial Authorities**

The Gatehouse, Kew Meadow Path, Richmond, TW9 4EN. Tel: 0208 392 9487

website: [www.iccm-uk.com](http://www.iccm-uk.com)

CBA aims include to: develop, promote and encourage proper practice for the service; encourage professional competence amongst those engaged in the service and to foster mutual co-operation in all matters affecting the service; provide opportunities and facilities for the discussion of questions which may arise from time to time as to the establishment, maintenance and management of cemeteries and burial grounds and other matters related to the service; provide technical, legal and administrative advice on all aspects of the service and to promulgate codes of practice; prepare and publish literature about the service; establish a central reference library for the collection and study of any aspect of the service for the purpose of research or of supplying information.

### **Council for Scottish Archaeology**

c/o National Museums of Scotland (see below).

Tel: 0131 247 4119.

Website: [www.britarch.ac.uk/csa](http://www.britarch.ac.uk/csa)

Website: [www.scottishgraveyards.org.uk](http://www.scottishgraveyards.org.uk)

The CSA is an independent voluntary organisation that represents both individual members and local

societies. Its remit covers promotion and support of the archaeological heritage of Scotland and the encouragement of policies to ensure adequate measures for the preservation, management and interpretation of this resource. It also has a strong educational remit and organises outreach events, an annual Summer School, a research conference and co-ordinates Scottish Archaeology Month each September. The CSA has also appointed a Carved Stones Adviser (promotion and enabling of good practice in the recording and conservation of carved stones, in particular gravestones and graveyards; contact point for basic conservation advice - see website, above).

### **Graveyard and Cemetery Liaison Group**

c/o TCRE, Historic Scotland (see below)

A Scottish forum with role of identifying and integrating the efforts of all relevant bodies who can influence practice in the management of burial grounds and cemeteries.

### **Historic Scotland**

Longmore House, Salisbury Place, Edinburgh, EH9 1SH. Tel: 0131 668 8600.

Website: [www.historic-scotland.gov.uk](http://www.historic-scotland.gov.uk)

Government Agency responsible for the built heritage. If ringing, please ask to speak to the ancient monument or historic building team (as applicable) for the relevant Council area.

### **Historic Scotland Conservation Bureau**

Historic Scotland. See above.

[hs.conservation.bureau@scotland.gsi.gov.uk](mailto:hs.conservation.bureau@scotland.gsi.gov.uk)

Advice on stone conservators; distribution and sales of Historic Scotland's Technical and Policy Publications, including *Carved Stone Decay in Scotland Assessment Methodology Handbook*.

### **Institute of Cemetery and Crematorium Management**

ICCM National Office, City of London Cemetery, Aldersbrook Road, Manor Park, London, E12 5DQ. Tel: 020 8989 4661.

Website: [www.iccm-uk.com](http://www.iccm-uk.com)

An Institute that has represented professionals working in burial and cremation authorities and companies throughout the UK since 1913. Its aim is to improve standards of services to the bereaved by providing professionals, authorities and companies with policy and best practice guidance and educational and training programmes.

**The National Association of Memorial Masons**

27a Albert Street, Rugby, Warwickshire V21 2SG.  
Tel: 01788 542264 Fax: 01788 542276  
e-mail: enquiries@namm.org.uk

NAMM was founded in 1907 by a small group of British monumental masons anxious to raise standards of workmanship in the craft. This still remains one of the Association's prime objectives

**National Committee on Carved Stones in Scotland (NCCSS)**

c/o Society of Antiquaries of Scotland (see below).

Website: [www.carvedstonesscotland.org](http://www.carvedstonesscotland.org)

An independent body that exists to draw attention to the threats to Scottish carved stones of all periods, to promote their understanding and appreciation, and to encourage a common approach to their recording and preservation. Representative members drawn from Scottish national organisations include many of those listed here, plus the Association of Regional and Island Archaeologists, Institute of Historic Building Conservation (website: [www.ihbc.org.uk](http://www.ihbc.org.uk)) and the National Trust for Scotland (website: [www.nts.org.uk](http://www.nts.org.uk))

**National Monuments Record of Scotland**

See Royal Commission on the Ancient and Historical Monuments of Scotland.

**National Museums of Scotland**

Chambers Street, Edinburgh, EH1 1JF. Tel: 0131 225 7534.

Website: [www.nms.ac.uk](http://www.nms.ac.uk)

Responsible for the national collections of archaeology, natural sciences, science and technology, world cultures, the decorative arts and Scottish history and culture. Displays internationally important Scottish archaeological material in the Museum of Scotland and offers specialist archaeological, historical and conservation advice.

**Public Monuments and Sculpture Association**

72 Lissenden Mansions, Lissenden Gardens, London, NW5 1PR.

Database and Sculpture Journal c/o Courtauld Institute, Somerset House, Strand, London, WC2R 0RN. Tel 020 7848 2614.

Website: [www.pmsa.org.uk](http://www.pmsa.org.uk)

Exists to heighten public appreciation of Britain's public sculpture, and to contribute to its preservation, protection and promotion.

**Royal Commission on the Ancient and Historical Monuments of Scotland (National Monuments Record of Scotland)**

John Sinclair House, 16 Bernard Terrace, Edinburgh, EH8 9NX. Tel: 0131 662 1456.  
Website: [www.rcahms.gov.uk](http://www.rcahms.gov.uk)

RCAHMS is the national body responsible for surveying and recording Scotland's archaeology, buildings and maritime heritage. The NMRS, which is a publicly available archive, is one of the main resources for information and archive material (photographs, drawings, etc) relating to carved stones. Opening hours: Monday to Friday 0930-1630 hrs.

**Scottish Association of Preservation Trusts**

c/o Cockburn Conservation Trust, Trunk's Close, 55 High Street, Edinburgh EH1 1SR. Tel: 0131 557 8744 Fax: 0131 557 9387

The Scottish Association of Preservation Trusts offers members practical advice and support on running a Building Preservation Trust and undertaking building restoration projects.

**The Scottish Churchyard Lichen Group**

c/o John Douglass, Countryside Ranger Service, Chatelheraut Country Park, Hamilton, South Lanarkshire, ML3 7UE

e-mail: [john.douglass@southlanarkshire.gsx.gov.uk](mailto:john.douglass@southlanarkshire.gsx.gov.uk)

This group (established 2003) aims to promote an understanding and appreciation of lichens within churchyards, to help conserve and enhance the quality of habitats for lichens within churchyards, and to record churchyard lichens throughout Scotland.

**The Scottish Civic Trust**

The Tobacco Merchants House, 42 Miller Street, Glasgow G1 1DT. Tel: 0141 221 1466 Fax: 0141 248 6952

An important feature of the Trust's routine work is casework - ongoing consultations with local authority planning departments on proposals which affect the character of listed buildings, conservation areas and local townscapes. On behalf of Historic Scotland, the Trust operates Scotland's *Buildings at Risk Register* which offers the public a much-valued service designed to find new uses for a wide range of endangered buildings. The Trust co-ordinates annually throughout Scotland the increasingly popular Doors Open Day events during September weekends, when fine buildings of many types and uses, normally closed to the public, are opened free of charge.

**Scottish Genealogy Society**

Library and Family History Centre, 15 Victoria  
Terrace, Edinburgh EH1 2JL. Tel: 0131 220 3677  
Fax: 0131 220 3677

The Library and Family History Centre contains books and manuscripts including reference books and directories, biographies, topographies, gazetteers, trades and profession lists, general Scottish history, peerage, heraldry, school and university rolls and individual family collections, both published and unpublished.

**Scottish Museums Council**

20/22 Torphichen Street, Edinburgh EH3 8JB. Tel:  
0131 229 7465.

Website: [www.scottishmuseums.org.uk](http://www.scottishmuseums.org.uk)

For information on your local museum.

**Scottish Records Association**

Scottish Records Office, HM General Register  
House, Princes Street, Edinburgh EH 1 4YY. Tel:  
0131 535 1314 Fax: 0131 535 1360

The Scottish Records Association is concerned with the preservation and use of historical records in Scotland. It provides a forum where users, owners and custodians of records can discuss matters relating to their custody, conservation and accessibility.

**Society of Antiquaries of Scotland**

National Museums of Scotland (see above). Tel:  
0131 247 4115/4133.

Website: [www.socantscot.org](http://www.socantscot.org)

National society; volunteer administrator and researcher/archivist for NCCSS.

**Treasure Trove Advisory Panel for Scotland**

c/o National Museums of Scotland (see above).  
Tel: 0131 247 4082; email: [j.shiels@nms.ac.uk](mailto:j.shiels@nms.ac.uk) and  
[info@treasuretrove.org.uk](mailto:info@treasuretrove.org.uk)

Website: [www.treasuretrove.org.uk](http://www.treasuretrove.org.uk)

Government-appointed Panel responsible for advising on the claiming, valuation and museum allocation of all portable antiquities found in Scotland.

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