

	Policy	Revised?
1	Risk Assessment	Y
2	Investment	Y
3	Reserves	Y
4	Conflict of Interest	Y
5	Banking Mandates	Y
6	Expenses	Y
7	Gifts & Hospitality	N
8	Staff & Trustee Recruitment	N
9	Staff Management	Y
10	Staff Pensions	Y
11	Data Protection	Y
12	Event Oversubscription	Y
13	Digital & Email	Y
14	Safeguarding	
15	Code of Conduct	Y
16	Complaints	Y
17	Care of Historic Items (NEW)	Y

1. Risk Assessment

The Court of Sion College recognises that effective risk management is essential to the achievement of the College's charitable objectives and the protection of its assets, reputation, members, beneficiaries, staff, volunteers and historic collections. In accordance with Charity Commission guidance, the Court maintains a risk management framework that enables the identification, assessment, monitoring and mitigation of strategic, operational, financial, heritage and compliance risks.

The Court reviews the College's principal risks on a regular basis and maintains a risk register that records identified risks, their potential impact and likelihood, existing controls, and any actions required to reduce risk exposure. Risk management is embedded within the College's governance and decision-making processes.

Governance and Strategic Risk

- Trustee recruitment, succession planning and retention.
- Ensuring that the Court collectively possesses the skills, knowledge and experience required to govern the College effectively.
- Compliance with the College's governing documents and charitable purposes.
- Strategic planning and the long-term sustainability of the College.

External and Reputational Risk

- Maintaining the reputation and public profile of the College.
- Delivering a relevant, accessible and high-quality programme of events and activities.
- Engagement with members, partners, stakeholders and the wider library and information profession.
- Responding effectively to changes in the external environment that may affect the College's operations or charitable objectives.

Regulatory and Compliance Risk

- Compliance with charity law and guidance issued by the Charity Commission.
- Compliance with data protection legislation, including the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018.
- Safeguarding responsibilities and the promotion of a safe environment for all participants in College activities.
- Compliance with health and safety, employment, equality, diversity and inclusion, and other relevant legal and regulatory requirements.
- Cyber security and information governance.

Financial Risk

Financial risks are managed in accordance with the College's Finance Policy, which sets out the arrangements for financial management, budgeting, internal controls, reserves, investments, delegated authority and the management of fraud and financial irregularity.

Operational Risk

- Effective management and administration of the College.
- Business continuity and resilience, including succession planning for key roles and responsibilities.
- Dependence on a small number of staff, volunteers or key office holders.
- Information technology systems, record management and operational processes.

Heritage and Collections Risk

- Protection and preservation of the College's historic collections, archives and artefacts.
- Appropriate storage, display, insurance and security arrangements for historic items.
- Maintenance of inventories, condition monitoring and conservation of heritage assets in accordance with the College's Care of Historic Items Policy.

2. Investment

General Objectives

The objectives of the policy are to ensure the creation of sufficient income and capital growth to enable the charity to carry out its purposes consistently year by year with due and proper consideration for future needs and the maintenance of and if possible, enhancement of the value in real terms of the invested funds.

Both capital and income may be used at any time for the furtherance of the charity's aims.

Investment Policy

The objective for the financial investments is to maximise the 'total return' over the long-term (>10 years), subject to not taking undue risk. This 'total return' represents the combination of changes in capital values and income received. Thus, a neutral position is taken as to whether a return is received by way of capital growth or distribution of income: it is the total which is important.

We have determined that investment in real assets, principally equities, represents the most appropriate strategy for meeting the College's financial and investment objectives.

Risk

Trustees appreciate that this approach will result in short-term volatility in the market value of the portfolio, but consider that the College's financial strength and absence of significant fixed costs mean that Sion College is able to withstand such fluctuations by adjusting the scale of its events programme. The Finance Committee reviews the asset allocation policy on at least an annual basis, taking appropriate professional advice when necessary.

The portfolio mix will fall within the following broad planning ranges:

	%
Equities	50-80
Fixed Interest	10-35
Property	0-30
Alternative Assets	0-20
Cash	0-20
Asset Class	%
Liquidity	4-20
Fixed Income	2-25
Pure Equity	61-79
Diversifiers	2-29

No initial investment should exceed 7.5% of the total value of the funds under management and the total sum of all equity holdings in excess of 5% must not be equal to or exceed 40% of the fund's value at any time without reference to the Finance Committee.

There are no geographical restrictions with regard to investment.

The Trustees have agreed that the portfolio will have exposure of 85% to real assets and 15% in either fixed interest and/or cash. The investment managers are free to move away from this as they see fit but within the ranges delineated above.

Ethical Policy

Sion College generally follows the ethical policy of the Church of England as a guide. A link to the current advice is shown below:

<https://www.churchofengland.org/about/leadership-and-governance/ethical-investment-advisory-group/policies-and-reviews>

Investment Manager

- i) Rathbone Investment Management, who have confirmed that they are an authorised person within the meaning of the Financial Services and Markets Act 2000, are appointed investment manager with delegated discretionary powers of investment, subject to the scope and limitations within this document. They have confirmed by signing this memorandum, that they will comply with the policy and arrangements, including the reporting requirements set out below, and that they will not depart from them save with the express approval of the Trustees. Rathbone Investment Management is regulated by the FCA and the PRA.

- ii) Rathbone Investment Management are to be remunerated through a management fee the details of which are set out below. Fees are to be deducted from income.

First £500,000	1%
Second £500,000	0.75%
Balance	0.5%

There will be no transaction charges.

- iii) AAF01/20 Audit and Assurance Faculty (An Accounting Standard of the Financial Reporting and Auditing Group of the Institute of Chartered Accountants – England and Wales) – Rathbone Investment Management will produce a report in respect of its nominee company annually and send to the charity’s auditors if required.

- iv) Insurance – Rathbone Investment Management will provide evidence of the firm’s insurance cover on request.

Reporting Requirements

Rathbone Investment Management will report to the Trustees quarterly, but at least twice a year and in particular on:

- i) a full listing of the investments with details of their cost, current market value, estimated income and income yield; this information shall, in any event, be provided as at 31st March each year;
- ii) statistics detailing the fund’s performance;
- iii) details of purchases, sales and realised gains and losses since the previous meeting;

- iv) details of any non-market transactions, right issues, etc;
- v) review of any outlook for the markets;
- vi) Fund Managers' review of the portfolio.

Cash Deposits

- i) Cash deposits are placed with approved banks with suitable credit ratings and approved third party managed Money Market Funds.
- ii) Cash deposits may also be placed with by Rathbone plc as part of the investment portfolio.

Benchmarking

The performance of the fund will be measured against the following Benchmark:

ARC £ Steady Growth Charity IndexARC Asset risk consultants is now widely used in the industry.

The **ARC Charity Indices (ACI)** are a set of **UK charity investment benchmarks** produced by **ARC Research (Asset Risk Consultants)**. They are designed to help charity trustees and advisers assess how a charity's investment portfolio has performed relative to other charities taking a similar level of risk, rather than against a traditional market index like the FTSE or MSCI World.

Annual Review

The foregoing policy and arrangements will be reviewed at least triennially. Any changes must be given in writing. The last review took place in 2022.

Custody

The investments of the portfolio will be held through Rathbone Nominees Limited, a wholly owned company of Rathbones plc.

Authorised Parties

The Treasurer and Court Members of the Finance Committee.

Any two of the above persons are authorised by the Court to issue instructions to Rathbone Investment Management.

3. Budget and Reserves

College projects currently are short term with allocated funds being spent in the budget year or occasionally carried forward into future years to finance specific projects. It is the policy of the College to maintain unrestricted funds and to produce annually in January a budget based upon 3.5% of the average of the total net assets appearing in the three most recent financial accounts approved by the Court with an additional 0.5% added to provide a contingency reserve to meet any unforeseen expenditure and only to be drawn upon in exceptional circumstances. The intention is to further the objects of the College while guarding against erosion of the real value of the capital endowment.

4. Conflict of interest

Purpose

The purpose of this policy is to protect the integrity of the College's decision-making process, to enable our stakeholders to have confidence in our integrity, and to protect the integrity and reputation of trustees and staff, as well as of the wider membership.

Principles

All staff and trustees of Sion College strive to avoid any conflict of interest between the interests of the College on the one hand, and personal, professional, and business interests on the other. This includes avoiding actual conflicts of interest as well as the perception of conflicts of interest.

Examples of potential conflicts of interest include:

- (i) A trustee or employee who is also a trustee of another charitable organisation with which the College has a business interest (eg the Society of the Faith as the College's landlord)
- (ii) A trustee or employee who is related to a member of the College
- (iii) A trustee or employee who has shares in a business that may be awarded a contract to do work or provide services for the College.

Procedure

Upon appointment each trustee will make a full, written disclosure of interests, such as relationships, and posts held, that could potentially result in a conflict of interest. This written disclosure will be kept on file and will be updated as appropriate. The details on this declaration can be supplied by the administrator to organisations who require it for their own CoI / AML reviews – including, but not limited to, The Charities Commission and the College's Investment Managers. The Administrator will inform trustees whose information has been shared in these instances.

In the course of meetings or activities, trustees and employees will disclose any interests in a transaction or decision where there may be a conflict between the College's best interests and the trustee's best interests or a conflict between the best interests of two organisations that the trustee or employee is involved with.

After disclosure, a trustee or employee may be asked to leave the room for the discussion and may not be able to take part in the decision depending on the judgement of the other trustees present at the time.

Any such disclosure and the subsequent actions taken will be noted in the minutes. A register of interests is maintained and updated on at least an annual basis.

This policy is meant to supplement good judgment, and staff and trustees should respect its spirit as well as its wording.

5. Banking Mandates

Mandates for banking and investment activities are designed to ensure that there are always sufficient signatories available for financial transactions to be authorised in the approved way, and in a timely fashion. The Finance Committee reviews mandates regularly and recommends any updates to the Court for authorisation.

6. Expenses

Any individual is entitled to claim for reasonable expenditure undertaken on behalf of the College. Claims should be submitted to the Administrator and approved by Honorary Auditors.

7. Gifts and Hospitality

In the event of any member of the Court being offered or receiving any gift, presentation or invitation arising out of service on the Court, but not involving actual representation of the College's interests; the circumstance and value shall be reported to the President who shall determine whether it may be received or enjoyed. In the event of such invitation or gift exceeding in value £100, it shall be recorded by the administrator. Care shall be taken that no gift or invitation unduly affects the interests or administration of the College.

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8. Staff and Trustee Recruitment

Purpose and Scope:

Staff and trustees are responsible for ensuring that Sion College is compliant with legislation and that it is operating in the best possible way for the benefit of its Fellows and Members. Staff and Trustee recruitment is vital to ensure the vibrant life of the College.

Principles:

Staff and trustee recruitment must be open, fair and take into account the skills needed for the role. Appointments of staff are made in the best interests of Sion College.

Procedure:

a) Staff Recruitment

Before recruitment:

The Court discusses the College's staffing requirements and delegates the recruitment of staff to the President and two other members of the Court. The Court must be realistic in its expectations and analyse the requirements of the role.

Job Description and Advertising procedure:

The job description is drawn up by the President in conjunction with the Court members delegated for the task and must include:

- Requirements of the job.
- Necessary and desirable criteria for job applicants, i.e. the skills, knowledge, behaviours and experience required.
- A description of the Charity and its activities.
- Job location.
- Summary of Benefits Package offered for the job.
- Length of Contract, if not standard hours or short-term.
- Details of references required
- Details of how to apply and the deadline.

Selection and appointment:

All applications will be treated confidentially. Candidates are shortlisted on the basis of matching his or her CV and letter of application against the job description. A record of the shortlisting process is made.

A structured approach is taken for interviews to ensure that all candidates are treated equally and consistently. Questions are planned carefully before the interview to focus on the skills, knowledge, behaviours and experience required for the job. All candidates are asked the same questions (although it is anticipated that any follow-up questions may be different, depending on the candidates' answers). Answers are scored using a consistent rating system.

Pre-employment checks:

The President is responsible for taking up references and ensuring that the selected candidate has the right to work in the UK

EITHER

The appointment is confirmed, and the decision relayed to the Court.

OR

The appointment is confirmed at the next Court meeting.

b) Trustee Recruitment

The Court are elected by the Fellows at the Annual General Meeting. The Court affirm that this should be a transparent process, and that any Fellow may stand for election.

9. Staff Management

Purpose and Scope: Bearing in mind that the President of Sion College is elected annually, it is important that the Court should be mindful of the management of staff.

Principles: The Court will comply with employment legislation and to ensure maximum consistency in line-management.

Procedure: The President sends to the Administrator on appointment a Statement of the Principal Terms and Conditions of Employment, which will include Disciplinary and Grievance Rules and Procedures.

The President line-manages the Administrator. Care must be taken to ensure a smooth handover between Presidents following the AGM.

An annual performance management meeting with the Administrator takes place in January attended by the President and Senior Dean together with a Lay Fellow.

This means that each clerical Court member plays a part in two performance management meetings: once as Senior Dean and once as President. The Lay Fellow brings continuity.

A report should be agreed and signed within one month of the performance management meeting so that any issues relating to performance management, including whether the Court needs to consider changes in the way the College operates, may be brought to the February or March Court meeting.

10. Staff Pensions

Employees of the College are entitled to remuneration for services rendered to the College. Their terms of employment must comply with all employment legislation in force at that time, including contributions to a pension scheme. The Administrator is the Pensions Manager. The Court agrees the pensions contribution which forms part of the terms of employment.

11. Data protection

Purpose and Scope

Sion College needs to keep certain information on its fellows and members to carry out its day-to-day operations, to meet its objectives and to comply with legal obligations. The College is committed to ensuring any personal data will be dealt with in line with the UK GDPR and Data Protection Act 2018. This policy is based on the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018 and recognises that personal data may be processed on a range of lawful bases, including but not limited to consent, legal obligation, contractual necessity, and legitimate interests. To comply with the law, personal information will be collected and used fairly, with the correct consents, stored safely and not disclosed to any other person unlawfully. The aim of this policy is to ensure that everyone handling personal data is fully aware of the requirements and acts in accordance with data protection procedures. This document also highlights key data protection procedures within the organisation. This policy covers staff and Court Members, although responsibility for ensuring data protection rests primarily with the Administrator, who is at the time of the most recent review of this policy (June 2026) the only person with access to the full range of members' personal data held by the College.

Principles and Definitions

In line with GDPR requirements Sion College will ensure that personal data:

- is processed lawfully, fairly and transparently
- is only used for a specific processing purpose that the data subject has been made aware of and no other, without further consent
- is adequate, relevant and limited. ie only the minimum amount of data should be kept for specific processing
- is accurate and where necessary kept up to date
- is not stored for longer than is necessary, and that storage is safe and secure
- is processed in a manner that ensures appropriate security and protection.

The definition of 'Processing' is obtaining, using, holding, amending, disclosing, destroying and deleting personal data. This includes some paper based personal data as well as that kept on computer.

Any personal data breach must be reported promptly in line with internal procedures and, where required, will be notified to the Information Commissioner's Office in accordance with legal obligations.

12. Event Oversubscription

Purpose and Scope

There has been an increase in attendance at Sion College events, with more events becoming oversubscribed. This policy sets out the principles and procedures used to allocate places at events and to manage reserve lists in a fair and transparent manner.

Principles

The Court seeks to ensure that places at events are allocated fairly, consistently, and transparently, having regard to the purpose and nature of each event.

Priority may be given, where appropriate, to:

- New Fellows and Members; and
- Fellows and Members whose role or responsibilities are particularly relevant to the event concerned.

Procedure

The Administrator maintains a secure database of Fellows and Members, in accordance with GDPR requirements. The database records applications for events, places offered, cancellations, and reserve lists, and is used solely for the purpose of administering events.

When allocating places at oversubscribed events, the Administrator applies a consistent allocation method designed to promote fairness over time, including the equitable rotation of reserve places. Subject to the principles set out above, this method determines which applicants are offered a place and which are placed on the reserve list.

The Administrator may exercise discretion in exceptional circumstances, consistent with the principles of this policy.

Oversight and Review

The operation of this policy may be reviewed periodically by the Court in light of experience and patterns of demand.

13. Use of Digital Media and Email

Purpose of the Website and Social Media

The purpose of the Sion College website and its presence on social media is to:

- Respond to enquiries and requests for information or help
- Share content created by the College
- Share insightful content relevant to the College but created by others
- Provide followers with an insight into the life, work, and activities of Sion College

Only those authorised by the Court may post content on behalf of the College or represent the College through its official digital channels.

Personal and Official Use

This policy applies to all official digital and email systems and accounts operated by the College. The Administrator and Court members, when using personal social media accounts, should take care not to imply that they are speaking on behalf of the College unless authorised to do so.

Inappropriate Content and Use

Sion College digital channels must not be used to share or spread inappropriate content, misinformation, or to take part in activities that could bring the College into disrepute.

When sharing articles, blog posts, or other third-party content, those posting material should review it thoroughly and not rely solely on headlines.

Inappropriate content includes anything that could reasonably be considered offensive, harmful, or inconsistent with the values and charitable purposes of the College, including (but not limited to): pornography; racial or religious slurs; gender-specific comments; content encouraging criminal or terrorist activity; or material relating to cults, gambling, or illegal drugs. This includes any text, images, or media that could reasonably offend on the basis of race, age, sex, religious or political belief, national origin, disability, sexual orientation, or any other characteristic protected by law.

The College will only engage reputable website operators and service providers with whom it has an agreed contract.

Safeguarding and Data Protection

All digital engagement must be consistent with the College's safeguarding policies. Particular care should be taken when content involves children, young people, or vulnerable adults.

Personal data must not be shared through digital channels without appropriate consent, and care should be taken when posting images, names, or personal information.

Email Use

Users of the College email system must not:

- Open email attachments from unknown or suspicious sources
- Disable security or email scanning software

Staff and Court members must always consider the security of the College's systems and data when using email. Emails should be written with the awareness that they are formal communications and may be subject to scrutiny or disclosure.

Inappropriate Email Content and Use

The College email system must not be used to send or store inappropriate content or material. Users must not:

- Write or send emails that may be defamatory, raise safeguarding concerns, or incur liability for the College
- Create or distribute inappropriate content or material
- Use email for illegal or criminal activities
- Send offensive, harassing, or intimidating communications
- Send messages or material that could damage the College's reputation

Website and Social Media Guidance

When updating the College website or engaging on social media:

- If unsure, do not post; err on the side of caution
- Be thoughtful and polite, maintaining the same standards of courtesy as in email or face-to-face communication
- Remain alert to security threats, including phishing and social engineering
- Use alternative channels for complex or sensitive enquiries
- Avoid escalating contentious exchanges; take time to reflect before responding

Any concerns, complaints, or incidents arising from digital or email use should be referred promptly to the Administrator, or to the President.

Review

This policy will be reviewed periodically to ensure it remains appropriate and effective.

15. Code of Conduct

(i) Conduct Generally

All Members and Fellows (except Lay Fellows) are clergy and are therefore also bound by the [Guidelines for the Professional Conduct of the Clergy](#). These guidelines may inform the assessment of complaints regarding conduct. Whilst all policies are available to Members and Fellows on request or via the website, this Code of Conduct shall be sent to all Members and Fellows so that they are aware of its content and purpose.

(ii) Safeguarding Matters

Any complaint involving safeguarding concerns—such as sexual harassment, violence, or abusive behaviour—will be addressed under the **College Safeguarding Policy**, available on the College website or from the Administrator.

For those licensed to officiate in any capacity, safeguarding concerns will also be reported to the safeguarding team of the relevant Diocese or Dioceses, in accordance with the policy.

(iii) Respectful Behaviour

Sion College exists to foster fellowship and learning, including through robust and informed debate.

Members and Fellows come from diverse Dioceses, backgrounds, and perspectives, and may hold differing—and sometimes strongly held—opinions. Healthy debate is encouraged, but it must be conducted with:

- Respect and attentiveness
- Awareness of language
- Avoidance of aggressive, patronising, discriminatory, or offensive behaviour

Speakers are central to debate and discussion. Members and Fellows should show them courtesy and respect, and opportunities will always be provided to ask questions or engage in discussion. Disruption, heckling, or discourteous behaviour toward speakers or questioners will be addressed promptly.

In cases where debate causes unintended offence:

- Members and Fellows are encouraged to address concerns directly and seek explanation or apology.
- If matters cannot be resolved informally, a member of the Court may investigate.
- The general approach prioritises **mediation and, where appropriate, an apology**.

(iv) Alcohol

While alcohol may be served at College events, Members and Fellows are reminded that the primary purpose of the College is education and support of the clergy. All attendees are expected to:

- Drink responsibly
 - Avoid behaviour that could cause harm or bring the College into disrepute
 - Observe the law regarding drink driving
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(v) Dress Code and Event-Specific Conduct

Certain event venues may require:

- Specific dress codes
- Restrictions on photography or electronic devices
- Observance of Chatham House Rule or other confidentiality requirements

Event publicity will clearly communicate any requirements, and attendees will receive reminders upon allocation of their place.

Non-compliance may result in:

- Being asked to amend behaviour or attire
- Refusal of entry if requirements cannot be met

Recording of College events in any form is strictly prohibited.

(vi) Sanctions

Repeated offensive behaviour or disputes not resolvable through mediation may lead to sanctions, including restricted attendance at events. Behaviour involving safeguarding concerns or criminal conduct (e.g., racially abusive conduct) may result in **deprivation of membership** or, for Fellows, **refusal of event access**.

16. Complaints

Purpose and Scope:

Sion College is committed to providing Fellows and Members with the highest standard of service. However, there may be occasions when a Fellow or Member feels that the quality or level of service falls short of reasonable expectations.

Complaints involving safeguarding concerns should be referred to the Safeguarding Policy. Complaints regarding the conduct of Fellows or Members should be referred to the Code of Conduct Policy.

Principles:

The Court is committed to addressing all complaints promptly, fairly, and impartially.

Procedure:

Stage 1: Informal

The Court encourages Fellows and Members to resolve day-to-day concerns or minor complaints informally and promptly. Initially, the complainant should raise the issue directly with the Court member or staff member involved.

Stage 2: Formal

If informal resolution is unsuccessful, a formal complaint may be submitted as follows:

- (i) Complaints should be submitted in writing to the President, using the admin@sioncollege.org email address, and marked "*confidential*". Receipt will be acknowledged within ten working days.
- (ii) If the complaint concerns the President, it should be addressed to the Senior Dean, marked "*confidential*".
- (iii) The President will investigate the complaint and communicate the outcome to the complainant within a reasonable timeframe, normally within 20 working days of receipt.
- (iv) Where a complaint is upheld, the President will agree on any necessary remedial action with the complainant.
- (v) If the complainant remains dissatisfied, they may submit their concerns in writing to an appeal panel of three Court members.
- (vi) If the appeal is upheld, the panel will agree on any further action with the complainant.
- (vii) Should the complainant remain dissatisfied after the appeal, they may escalate the matter to the Visitor.

The President will maintain a record of complaints, their nature, and outcomes, reporting to the Court at least annually.

17. (NEW) Policy for the Care of Historic Items belonging to the College

1. Purpose

This policy sets out the Court's approach to the care of historic items in its ownership. These items form part of the College's heritage and must be safeguarded responsibly.

2. Scope

This policy applies to these historic items belonging to the College:

- Historic portraits

Three Royal Charters

- Historic silverware

3. Responsibility

The Court of Governors holds ultimate responsibility for the proper care of historic items.

The Honorary Curator is responsible for inspection and reporting to the Court in accordance with this policy.

4. Location and Display

- Historic portraits are displayed in three approved locations. Details are in the Inventory appended to this policy.
- Historic silverware is stored or displayed in a fourth approved location. Details are in the Inventory appended to this policy.

Items shall be displayed or stored in a manner that:

- Minimises risk of damage, deterioration, or loss
- Takes reasonable account of environmental conditions and security
- Reflects the significance of the items

No historic item may be moved, loaned, or otherwise disposed of without the approval of the Court of Governors.

5. Insurance

All historic items shall be:

- Appropriately insured as part of the Court's insurance arrangements
- Included on the insurance schedule at values reviewed periodically

The Honorary Curator shall advise the Court of Governors if revaluation or specialist insurance advice is required.

6. Inventory and Records

The Court shall maintain an inventory of historic items, recording:

- Description, attribution and identification details
- Current location
- Condition notes
- Insurance status
- Any loan or other agreements affecting the item

The inventory shall be maintained by the Honorary Curator.

7. Inspection and Reporting

- All historic items shall be inspected annually in situ by the Honorary Curator.
- Following the inspection, the Honorary Curator shall update the inventory as necessary.

An annual report, including any significant findings, recommendations, or concerns, shall be presented to the Court of Governors at the June Residential.

8. Loans and Agreements

Any loans, deposits, or other agreements relating to historic items shall be:

- Recorded in the inventory
- Kept under regular review by the Court

9. Conservation and Repair

No conservation, restoration, or repair work shall be undertaken without appropriate advice and the approval of the Court of Governors.

10. Review of Policy

This policy shall be reviewed periodically by the Court of Governors to ensure it remains appropriate and effective.