## Resources

### Controlled Vocabularies

#### *\*Introduction to Controlled Vocabularies\**

<https://www.getty.edu/research/publications/electronic_publications/intro_controlled_vocab/index.html>

A comprehensive overview of the characteristics, scope, and uses of controlled vocabularies for cultural heritage topics, and an explanation of integration of vocabularies in information systems and their use for indexing and retrieval is provided by *Introduction to Controlled Vocabularies: Terminology for Art, Architecture, and Other Cultural Works* ({{Harpring 2010}}, {{Harpring 2013||2013}}).

#### Getty Vocabularies

<https://www.getty.edu/research/tools/vocabularies/>

The Getty Vocabularies are controlled vocabularies that may be useful for reference. They include the multilingual Getty Art and Architecture Thesaurus (AAT), which is used by a number of national and regional heritage inventory programs as a basis for defining their controlled vocabularies. The AAT contains an online, dynamic thesaurus of concepts of an international scope relating to historical architecture and archaeology, with many concepts in multiple languages. All concepts are validated through multiple authority references. AAT content is available in digital formats ready to be imported into databases. Because it is multilingual, the AAT could potentially serve as a useful resource for translation efforts for multilingual inventories, depending on the languages involved.

#### U.K. national heritage thesauri

<https://www.heritagedata.org/blog/vocabularies-provided/>

Another interesting example for reference is provided by the controlled vocabularies used by national and local heritage inventories in the United Kingdom. They include hierarchical thesauri of building and monument types and their components, building materials, maritime craft types, temporal periods, event types, archaeological objects, types of archaeological evidence, and archaeological sciences. Both the Getty Vocabularies and the U.K. national heritage thesauri are available in formats that can be readily imported into databases, in their entirety, in part, or as selected concepts.

#### Flanders Heritage Agency’s use of thesauri

<https://doi.org/10.5194/isprs-annals-IV-2-W2-151-2017>

Mortier et al. ({{Mortier et al. 2017||2017}}) offer an informative review of the Flanders Heritage Agency’s practical work with controlled vocabularies for its inventories over many years, including their evolution over time, how challenges were overcome, and how thesauri became an essential tool for integrating heritage recording by different disciplines.

Also see [FISH](#_FISH:), in this sidebar.

### Data Standards

#### MIDAS Heritage data standard

<https://historicengland.org.uk/images-books/publications/midas-heritage/>

Heritage organizations or practitioners considering which record types to include in an inventory may find it useful to review the MIDAS Heritage data standard ({{English Heritage 2012}}), a well-considered example of a national standard that defines information categories.

#### International and regional core data standards

<https://cidoc-data.org/aswg-international-core-data-standard-for-archaeological-and-architectural-heritage>

For the task of identifying and defining specific categories of information, or data fields, for an inventory, the work undertaken to establish international standards for the inventory of heritage places may be helpful. In the early 1990s, two such standards were developed to identify the essential items of information that should form a part of any cultural heritage inventory: the Core Data Index to Historic Buildings and Monuments of the Architectural Heritage adopted by the Council of Europe in 1995 ({{Council of Europe 1995}}), and the International Core Data Standard for Archaeological Sites and Monuments adopted by the International Committee for Documentation (CIDOC) of the International Council of Museums (ICOM) and the Council of Europe, also in 1995 ({{Council of Europe 1999}}).

In the late 2000s, the CIDOC Archaeological Sites Working Group made the decision to revise the Core Data Standard to bring it up to date, given that it was developed before the introduction of mass computing, the Internet, and the development and widespread adoption of geographic information systems. The working group decided to combine the two standards mentioned here, because they were so closely linked. The CIDOC working group, with input from CIPA, the Heritage Documentation Committee of the International Council on Monuments and Sites (ICOMOS), prepared a draft International Core Data Standard for Archaeological and Architectural Heritage, which was intended for use in the creation of inventories for both built and archaeological heritage. As of this writing, this newer standard has not yet been finalized; however, working drafts can be downloaded from the URL shown above.

Also see [FISH](#_FISH:), in this sidebar.

### Fiscal Support

#### AZSITE

<https://statemuseum.arizona.edu/crm/azsite>

The U.S. state of Arizona has created an interesting combination of mechanisms to support its statewide heritage inventory database, known as AZSITE (<https://azsite3.asurite.ad.asu.edu/azsite/index.html>). First, the governor of Arizona issued an executive order directing the AZSITE Consortium – composed of the Arizona State Historic Preservation Office, the Arizona State Museum, Arizona State University, and the Museum of Northern Arizona – to “cooperatively share data, provide shared staffing resources, seek grant funding, and develop and implement a single statewide historic property (archaeological and historical period properties) inventory database and geographic information system (GIS)” ({{State of Arizona 2006}}).

The executive order provides that the consortium shall continue to participate in the management, maintenance, and updating of the AZSITE database, and that it will cooperatively seek grant funding to provide for database improvements. It also provides that “all state agencies owning, managing, funding or causing action upon historical or archaeological properties shall help to update the AZSITE system by submitting survey and property location information to the system.” Although a subset of data within the AZSITE database is freely available to the public, the consortium provides access to other secured data to individuals with certain qualifications, who must pay annual user fees that vary depending on types of information sought and user profile (see <https://azsite3.asurite.ad.asu.edu/azsite/forms.html>). AZSITE does not have an annual budget from state funds. It receives its support through grants and user fees.

#### Historic England HER access and charging policy guidance

In England, many of the more than eighty local government historic environment records (HERs) charge fees for recovering the costs of staff time for responding to queries from commercial inventory users. In some cases, HERs charge a fixed hourly rate for staff time. In other cases, HERs charge according to a tiered scale relating to the geographic scale, level of complexity, and requested response time of commercial entity searches. Historic England has created an Access and Charging Policy template as guidance for HERs preparing their own access and charging policies. That template (and many other resources) are available at <https://historicengland.org.uk/advice/technical-advice/information-management/support-for-hers/>.

Further information and an example of a completed charging policy are available from Greater London Historic Environment Record (GLHER) at <https://historicengland.org.uk/services-skills/our-planning-services/greater-london-archaeology-advisory-service/greater-london-historic-environment-record/#Charges>.

### Guidance Materials

#### Informing the Future of the Past

<https://archaeologydataservice.ac.uk/ifp/Wiki.jsp>

Comprehensive guidance has been created for historic environment records in the U.K. on a broad range of topics relating to the operation of local authority heritage inventories ({{Informing the Future of the Pastn.d.}}). Formerly a printed book, this guidance has now been published as an online wiki, allowing it to be easily updated.

#### Canmore polygonisation standards

<https://canmore.org.uk/content/historic-environment-polygonisation-standards-scotland>

National heritage organizations in Scotland have published useful guidelines for recording spatial polygons describing the location of heritage resources and heritage-related activities.

### Information Accessibility

#### International Open Data Charter

#### <https://opendatacharter.net/wp-content/uploads/2015/10/opendatacharter-charter_F.pdf>

Those interested in decision-making concerning making information openly accessible may wish to consult for reference the 2015 International Open Data Charter.

#### CARE Principles

<https://www.gida-global.org/care>

If you need to consider the cultural sensitivities of providing access to information relating to indigenous groups, see The CARE Principles for Indigenous Data Governance at the URL shown above. For further background, refer to {{Carroll et al. 2020}}.

### Inventory Communities of Practice

#### HER Forum

<https://historicengland.org.uk/advice/technical-advice/information-management/support-for-hers/#Section1Text>

England’s Historic Environment Record Forum serves as community of practice for professionals working with and interested in regional and local heritage inventories. The HER Forum has in-person meetings twice annually, as well as an online discussion list. Discussions are archived at <https://www.jiscmail.ac.uk/cgi-bin/webadmin?A0=herforum>, where you can also subscribe.

#### FISH

<https://www.heritage-standards.org.uk/>

The UK Forum on Information Standards in Heritage (FISH) is a well-established example of a sector-wide standing entity devoted to information standards (including controlled vocabularies) and their creation, ongoing maintenance, improvement, and application. The organization also includes a terminologies working group; see <https://www.heritage-standards.org.uk/working-groups/>.

### Inventory Consolidation and Integration

#### Flanders Heritage Agency

<https://www.onroerenderfgoed.be/>

The Flanders Heritage Agency of Belgium has published an excellent overview of its experience in unifying separate inventories for differing heritage types ({{Van Daele, Meganck, and Mortier 2015}}, {{Van Daele, Meganck, and Mortier 2016||2016}}). As described in {{Van Daele et al. 2018}}, this amalgamation of inventories was spurred by the passage of a new heritage law in 2013 that for the first time provided unified legislation in Flanders for archaeology, architectural heritage, and cultural landscapes.

#### HIAS

<https://historicengland.org.uk/research/support-and-collaboration/heritage-information-access-simplified/>

England’s heritage sector has been implementing a multiyear initiative known as the Heritage Information Access Simplified (HIAS) strategy, which is aimed at resolving long-standing challenges of complexity and duplication of effort in the management of and access to heritage information nationally. It is composed of interlinked projects designed to simplify and improve public access to heritage information held or generated by Historic England, by regional and local agency HERs, and by other heritage organizations (see also {{Carlisle and Lee 2016}}).

Important aspects of this work have been to eliminate duplication of information held by multiple agencies and duplication of resources expended in the creation and management of information through the rationalization and clarification of responsibilities across the sector, and to further invest in the application of information standards shared across the national heritage sector.

### Legal and Policy Framework

#### Cadw

<https://cadw.gov.wales/advice-support/placemaking/historic-environment-records>

The Welsh government’s historic environment service, known as Cadw, has published statutory guidance for a range of heritage agencies in Wales on how they should use and contribute information to the Welsh national and regional heritage inventories. This serves as a well-articulated example of how heritage inventories can be directly supported through a legal and policy framework; see especially {{Cadw 2017b}}.

### Monitoring and Evaluation

As noted previously, the English and Welsh governments have each created well-developed systems for auditing regional and local government inventories (HERs). Both systems include a range of specific benchmarks for assessment on a five-year basis; see {{Cadw 2017c}} and {{Historic England 2023b}}.

### Stakeholder Inclusion

#### Australia ICOMOS code of ethics

<https://australia.icomos.org/wp-content/uploads/Code-on-the-Ethics-of-Co-existence.pdf>

In some contexts, professional codes of practice address how heritage specialists should deal with stakeholder groups in the identification of heritage resources and related information, and this has direct relevance to work pertaining to inventories as well as related data collection activities. For example, Australia ICOMOS’s Code on the Ethics of Co-existence in Conserving Significant Places ({{Australia ICOMOS 1998}}) specifies, among other things, the following ethical principles:

**[block quote]**

Article 4. Each cultural group has a primary right to identify places of cultural significance to it and this right may include the withholding of certain information.

Article 5. Each cultural group has the right of access to pertinent information and to any decision-making process affecting places it has identified as significant.

**[end block]**