



# CONSERVATION AND COLLECTIONS CARE POLICY

2015–2020

## Policy Information

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## EXECUTIVE SUMMARY

The Otago Museum Conservation and Collections Care Policy outlines the standards and practices applied to all collection items to ensure they are stored, displayed, handled and conserved within professional standards and that all relevant legal and ethical obligations are met. The policy outlines how the Museum will conserve and care for its collections by articulating appropriate pest management, environmental monitoring, disaster planning, staff training and remedial treatment strategies for the period 2015 to 2020. The policy reflects the aim to strike a balance between the long-term preservation of the collections and the provision of access for research, interpretation and display.

## 1.0 Definitions

### Collections care

Physical measures taken to minimise conditions that may cause damage to collections. Such measures are based on the principles of preventive conservation with a particular emphasis on providing controlled and secure environments for storage and display, as well as recordkeeping. Collections care also has a cultural dimension wherein source communities may have an appropriate vested interest in the way specific material is stored, handled, conserved or otherwise maintained.

### Conservation

The profession responsible for the preservation of cultural property for the future. Conservation activities include examination, documentation, research, advice, treatment, preventive care, training and education.

### Conservator

A professional whose primary occupation is the practise of conservation and who, through specialised education, knowledge, training and experience, formulates and implements all the activities of conservation, both preventative and remedial, in accordance with a defined code of ethics and professional guidelines.

### Preventive conservation

All measures and actions aimed at avoiding and minimising future deterioration or loss to collections. These measures and actions are indirect; they do not interfere with the materials or structures of the items and do not modify appearance. Preventive conservation includes, but is not limited to: appropriate measures and actions relating to storage, handling, packing and transportation, security, environmental management (light, humidity, pollution and pest control) and disaster planning.

### Remedial conservation

All actions directly applied to an item or group of items to arrest ongoing damaging processes or to reinforce an item's physical structure as well as facilitating appreciation, understanding and use of the item now and in the future. These actions sometimes modify the appearance of the items but are based on a respect for the original materials and originating cultural communities.

## 2.0 Policy statement

- The purpose of the Conservation and Collections Care Policy is to ensure that the Otago Museum (hereafter referred to as 'the Museum') fulfils its responsibilities in relation to the Otago Museum Trust Board Act 1996 which requires the Museum  

'to collect, preserve, act as a regional repository for, research, display, and otherwise make available to the people of the present and the future, material and information relating to the natural, cultural, and scientific heritage of the peoples of the world.'
- The policy outlines how the Museum will conserve and care for its collections, in line with international standards and guidelines, and in proportion to the resources available. The policy aims to strike a balance between the long term preservation of the collections and the provision of access through the management of risk to the collections and the management and training of staff.
- The collections in the Museum are cared for and maintained in conditions intended to preserve and extend their physical integrity. The Museum has established

minimum standards of physical care and regular schedules for the maintenance of collections. Conservation programming and maintenance schedules reflect public access requirements, research and exhibition needs, funding, staff resources and urgency of care.

### 3.0 Standards & guidelines

The Museum is committed to achieving standards of excellence as defined by national and international professional codes. The Conservation and Collections Care Policy conforms to the relevant provisions of the following codes and standards:

#### Codes of Ethics and Practice

- American Institute for Conservation of Historic and Artistic Works (AIC), Code of Ethics and Guidelines for Practice, 1994 ([www.conservation-us.org](http://www.conservation-us.org))
- American Institute for Conservation of Historic and Artistic Works (AIC), Commentaries to the Guidelines for Practice, 2000 ([www.conservation-us.org](http://www.conservation-us.org))
- American Institute for Conservation of Historic and Artistic Works (AIC), 2003, defining the Conservator: Essential Competencies ([www.conservation-us.org](http://www.conservation-us.org))
- Australian Institute for the Conservation of Cultural Material (AICCM), Code of Ethics and Code of Practice, 2002 ([www.aiccm.org.au](http://www.aiccm.org.au))
- Canadian Association for Conservation of Cultural Property (CAC), Code of Ethics and Guidance for Practice, 2009 ([www.cac-accr.ca](http://www.cac-accr.ca))
- European Confederation of Conservator-Restorers' Organisation (E.C.C.O), Professional Guidelines I–III, 2004 ([www.ecco-eu.org](http://www.ecco-eu.org))
- International Council of Museums (ICOM), Code of Ethics for Museums, 2013 ([www.icom.org](http://www.icom.org))
- International Council of Museums (ICOM), Code of Ethics for Natural History Museums, 2013 ([www.icom.org](http://www.icom.org))
- Institute of Conservation (ICON), Code of Conduct and Professional Standards, 2014 ([www.icon.org.uk](http://www.icon.org.uk))
- New Zealand Conservators of Cultural Materials (NZCCM), Code of Ethics, 2006 ([www.nzccm.org.nz](http://www.nzccm.org.nz))

#### Standards and guidelines

- BS EN 15757:2010 Conservation of cultural property. Specifications for temperature and relative humidity to limit climate-induced mechanical damage in organic hygroscopic materials, 2010
- BS EN 15946:2011 Conservation of cultural property. Packing principles for transport
- BS EN 15999-1:2014 Conservation of cultural heritage. Guidelines for design of showcases for exhibition and preservation of objects - General requirements, 2014
- BS EN 16085:2012 Conservation of Cultural property. Methodology for sampling from materials of cultural property. General rules
- BS EN 16095:2012 Conservation of cultural property. Condition recording for movable cultural heritage
- BS EN 16141:2012 Conservation of cultural heritage. Guidelines for management of environmental conditions. Open storage facilities: definitions and characteristics of collection centres dedicated to the preservation and management of cultural heritage
- Collections Trust. 2011. Benchmarks for Collections Care 2.0
- Environmental Guidelines – IIC and ICOM-CC Declaration, 2014([www.icom-cc.org](http://www.icom-cc.org))

- Heritage Collections Council (Australia). 1998. Re Collections: Caring for Cultural Materials 1.
- Heritage Collections Council (Australia). 1998. Re Collections: Caring for Cultural Materials 2.
- Heritage Collections Council (Australia). 1998. Re Collections: Damage and Decay
- Heritage Collections Council (Australia). 1998. Re Collections: Handling, Transportation, Storage and Display.
- McKenna, G & Patsatzi, E (Eds). 2011, "SPECTRUM: The UK Museum Documentation Standard", MDA, Cambridge, 4th Edition
- Museum & Galleries Commission. 1992. Standards in the Museum Care of Archaeological Collections.
- Museum & Galleries Commission. 1992. Standards in the Museum Care of Biological Collections.
- Museum & Galleries Commission. 1992. Standards in the Museum Care of Larger and Working Objects Collections.
- Museum & Galleries Commission. 1996. Standards in the Museum Care of Photographic Collections.
- Museum & Galleries Commission. 1998. Standards in the Museum Care of Costume and Textile Collections.
- Museum & Galleries Commission. 2004. Standards in the Museum Care of Geological Collections.
- Museum & Galleries Commission. 2005. Standards in the Museum Care of Musical Instruments.
- Museum & Galleries Commission. 1995. Standards for Touring Exhibitions.
- Society for the Preservation of Natural History Collections (SPNCH), 1998, "Guidelines for the Care of Natural History Collections" ([www.spnhc.org](http://www.spnhc.org))
- Stollow, N, 1979, Conservation Standards for works of art in transit and on exhibition. UNESCO.
- PAS 197:2009 Code of Practice for Cultural Collections Management
- PAS 198:2012 Specification for managing environmental conditions for cultural collections
- PD CEN/TS 16163:2014 Conservation of Cultural Heritage. Guidelines and procedures for choosing appropriate lighting for indoor exhibitions, 2014

#### Otago Museum Policies and Procedures

- Collection Policy
- Collection Development Strategy
- Conservation and Collection Care Strategy
- Research and Publication Strategy
- Regional Museums Strategy
- Accidents Involving Objects on Display Operational Guidelines
- Cleaning of Display and Storage Areas Operational Guidelines
- Collections and Research Operational Guidelines
- Collections Acquisition Procedure Operational Guidelines
- Collection Item Photography Operational Guidelines
- Collection Storage Tours Operational Guidelines
- Condition Reporting Operational Guidelines
- Contracts for Goods and/or Services Operational Guidelines
- Destructive Sampling Operational Guidelines
- Destructive Sampling Agreement
- Digital Archiving of Documentation Related to Collection Items Operational Guidelines
- Digitisation of Collection Items and Information Operational Guidelines
- Document Archiving Operational Guidelines

- Exhibition and Case Photography Operational Guidelines
- Events and Functions in Galleries and Public Spaces Operational Guidelines
- Hazard Management Operational Guidelines
- Honorary Curators Operational Guidelines
- Integrated Pest Management Operational Guidelines
- Inward Loan Procedure Operational Guidelines
- Item Handling Operational Guidelines
- Item Packing for Storage or Transport Operational Guidelines
- Management of Strong Room Operational Guidelines
- Management of Wahi Tapu Operational Guidelines
- Materials for Storage and Public Presentation Operational Guidelines
- Occupational Safety and Health Operational Guidelines
- Outward Loan Procedure Operational Guidelines
- Preservation Guidelines for Public Presentation of Collection Items Operational Guidelines
- Proposal for Access
- Proposal for Acquisition
- Protected Objects Act Operational Guidelines
- Receipt of Natural Science Items into the Search Centre Operational Guidelines
- Receipt of Humanities Items into the Search Centre Operational Guidelines
- Security and Access Operational Guidelines
- Securing External Conservation Assessments and Treatments Operational Guidelines
- Training and Development Operational Guidelines
- Vernon Data Entry Operational Guidelines

## **4.0 Condition of the collections**

- 4.1 The Museum's Collections and Research team will work in collaboration with the conservation staff to monitor the Museum's collections, documenting changes in condition, identifying objects for conservation assessment etc.
- 4.2 Sensitive, vulnerable or hazardous objects will be actively identified, recorded and flagged. All Museum employees, Honorary Curators and volunteers will comply with all procedures and guidelines relating to the handling, display, transportation and care of flagged items.
- 4.3 The Museum accepts that use of the collection in gallery displays, exhibitions, touring exhibitions, loans and scientific research may result in some change in condition. The risk to the collection will be minimised through the use of specified standards for display materials, mounts, packing cases, transportation, destructive sampling and through staff training and compliance with international best practice.
- 4.4 The Conservation Manager will be responsible for developing an overarching conservation strategy combining preventive and remedial conservation activities and programming for their implementation.

## **5.0 Risk management**

- 5.1 All activities which involve the use of collection items, such as handling, transportation, display and access for research carry a potential risk to the longevity and condition of the collection.

- 5.2 The Museum aims to manage and mitigate the risks to the collection to a level which is acceptable when balanced against the need to ensure the collections are accessible and interpretable. Maintenance of the appropriate balance is the responsibility of the Director, Collections, Research & Education, following consultation with the relevant Collections and Research Staff and where appropriate members of the wider museum staff. In the case of dispute that cannot be resolved to the satisfaction of all involved the Museum Director will make the final decision.
- 5.3 Collection risk management activities will include but not be limited to, providing staff with appropriate training, monitoring the conditions in which the collection is housed, ensuring procedures are in place to document changes in the condition of items and the maintenance of a plan to safeguard the collections in the event of unforeseen incidents, disasters or emergencies.

## **6.0 Preventive conservation**

- 6.1 The Museum recognises that a preventive conservation approach is the most cost and resource-effective way to care for collections in the long term. This will include measures to reduce damage or deterioration associated with known risks to the collection.
- 6.2 The environmental conditions specified by the Museum's conservation staff will comply with the PAS 198 Guidelines as well as national and international agreement and guidelines.
- 6.3 All collection items should be housed in conditions as prescribed by the Museums environmental, storage and display guidelines. Any movement of a collection item should result in the item being placed in matching or improved conditions.
- 6.4 All material used in association or close proximity with collection items must be of an appropriate standard to prevent damage or deterioration. The testing of new materials will be actively undertaken by the Museum's conservation staff.
- 6.5 All collection items will be assessed and categorised according to their sensitivity to light. Light levels and exposure time will be minimised to manage the rate of irreversible fade/change.
- 6.6 No unnecessary radiation (such as ultra-violet) other than visible light should fall on objects during normal display and storage.
- 6.7 The risk to collections from dust and pollution will be managed through a combination of good housekeeping, display design, filtration of circulated air and building maintenance.
- 6.8 The Museum accepts that there will be a level of pest presence across the site. This will be managed through a combination of good housekeeping and agreed-upon quarantine procedures, in accordance with the Museum's Conservation Strategy and best Integrated Pest Management (IPM) practices. All Museum employees, Honorary Curators and volunteers have a responsibility to inform the conservation staff of immediate and potential pest problems affecting the Museum.
- 6.9 Collection items within the Museum will be protected from vibration or shock, whilst on display, in storage and during transportation.

- 6.10 The Museum will optimise the space and capacity of all collection areas, through the use of cost-effective systems to provide flexible, safe and appropriate storage for all collection items.

## **7.0 Remedial Conservation**

- 7.1 Remedial conservation treatment may be undertaken to stabilise the collections, to enhance intellectual access and accuracy, and to improve visual appearance.
- 7.2 Treatments are intended to prolong and extend the useable 'life' of collection items and will be undertaken in accordance with international standards and ethical guidelines.
- 7.3 Treatments will be discussed with and agreed upon by the relevant curatorial staff, taking into account the purpose for which the object is to be used, the wishes of the original artist (if known) and all relevant Māori or Indigenous customs.
- 7.4 The Conservation Manager is responsible for final approval of remedial conservation treatments and ensuring that the resulting treatment and documentation meets the required international standards
- 7.5 Where the necessary conservation skills or experience are not available within the Museum, external conservation staff may be employed with the agreement of the Director, Collections, Research and Education. The Conservation Manager will be responsible for the organization and oversight of all such contractors.

## **8.0 Staff**

- 8.1 All Museum employees, Honorary Curators and volunteers will be aware of and comply with the Museum's Conservation Strategy and related Guidelines as they apply to their day to day activities. In-house training covering Integrated Pest Management (IPM), Disaster Response and Object Handling will be provided by conservation staff at induction and at regular intervals thereafter.
- 8.2 All collection items will be handled and moved by staff who have undergone in-house training, are competent to do so and are aware of all relevant Māori or Indigenous customs.
- 8.3 All collection item moves will be assessed prior to being undertaken to ensure that the appropriate resources and arrangements are in place, so as to minimise the risk to both the item and the staff members.
- 8.4 The conservation staff are responsible for the delivery of preventive and remedial conservation programmes in line with the Museum's strategic plan and will facilitate and contribute to the investigation, research and display of the Museum's collections.
- 8.5 The Conservation Manager will be responsible for ensuring that the qualifications, skills and expertise of Museum, and where necessary external, conservation staff are appropriate for the care of the collections held by the Museum.



## **9.0 Research and partnerships**

- 9.1 The Museum will continue to improve its standards, efficiency and effectiveness in the conservation and care of its collections through a combination of staff development, in-house research and mutually beneficial partnerships with external individuals, institutions and bodies.
- 9.2 The Museum will actively share conservation and collections care expertise and knowledge with colleagues in the wider museum, heritage and educational sectors.
- 9.3 The conservation staff will provide expertise in conservation and collections care to support and assist in the development of the Museum's regional, national and international initiatives, resources permitting.

## **10.0 Providing conservation and collections care services to third parties**

- 10.1 The conservation staff, supported by Collections and Research staff, will respond to public enquiries in the field of conservation and collections care. All enquiries will be answered free of charge unless significant staff time or resources are required. Advice will be limited to preventive conservation and collections care.
- 10.2 The Museum's conservation staff, supported by Collections and Research staff, may provide conservation and collections care services including remedial conservation to third parties as requested, pending approval by both the Director, Collections, Research and Education and the Conservation Manager prior to any agreement or contract being entered into.
- 10.3 Any activities undertaken in the service of a third party will be subject to the same international standards and codes of ethics as when dealing with the Museum's own collections. The museum's internal financial procedures and guidelines must also be adhered to.
- 10.4 Advice, support or services will not be offered to a third party if doing so is likely to have detrimental effect on the Museum's own activities or damage the standing or reputation of the Museum.
- 10.5 No remedial conservation treatment will be carried out by Museum staff on an item or group of items where there is reasonable cause to believe that the current holder is not legitimately entitled to retain the object(s) or that the object(s) have been stolen, illegally excavated, illegally exported or illegally imported.