

Working with Independent Conservators

The Museums & Galleries Commission (MGC) is the national advisory body for museums in the United Kingdom. It promotes the interests of all museums and galleries and undertakes strategic work to raise museum standards. The MGC provides expert and impartial advice to museums and others, and advises the Government on museum policy. Through its work the MGC aims to encourage as many people as possible to visit and enjoy the nation's museums and galleries.

Find out more about the MGC by visiting our website at www.museums.gov.uk

Working with Independent Conservators

Guidelines for good practice

Peter Winsor (Editor)

Guidelines for Good Practice aim to assist museum curators and managers in developing their museum services to a high standard. Each set of Guidelines is produced with the assistance of appropriate specialists with extensive museum experience. Guidelines are advisory and are designed to support curators and managers when they are seeking to develop their services beyond the basic minimum standards required by the Registration Scheme for museums and galleries.

Contents

Background	4
Introduction	5
General Advice on Working with Conservators	6
Remedial Conservation Projects	8
Collection Condition Surveys	13
Other Types of Survey Useful for Collections Management	21
Tendering	22
Glossary of Terms	23
Appendix 1	24
Conservation-Restoration: The Options	
Appendix 2	29
Finding a Conservator: The Conservation Register	
Appendix 3	30
Professional Organisations	

Background

- 4 This publication describes the stages in commissioning conservation work from an independent (private sector) conservator and what museum staff need to know and do to help ensure that the project runs smoothly and is completed successfully. In particular it deals with specific types of projects, remedial conservation of objects and collection condition surveys. It also contains useful information about the options for tendering.

The section on commissioning conservators to carry out remedial conservation projects is adapted from the leaflet *Working with a Conservator: A guide for curators*, which was published jointly by the Museums & Galleries Commission and South East Museums Service.

The section on collection condition surveys was written by Jane Henderson, a conservation consultant based in Wales.

Appendix 1, Conservation-Restoration: The Options, is adapted from a leaflet with the same title, originally published jointly by the Conservation Unit of the Museums & Galleries Commission and the Scottish Conservation Bureau, Historic Scotland, Edinburgh in 1993.

These Guidelines are designed to help museums and other organisations to appoint, brief and work with independent conservators. As the number of conservators employed in museums declines, there will be an increasing need to contract out specialist conservation work. The type of work a museum might want a conservation specialist to carry out may range from the conservation of a single object to undertaking a condition survey or assessing how well the museum is performing in caring for its collection. The two main sections of this publication focus on contracting a conservator to carry out remedial conservation treatments and undertaking a collection condition survey. The aim of the Guidelines is to help museums manage conservation projects efficiently and cost-effectively.

It is in the best interests of your museum to build up a long-term relationship with local conservators. If your museum does not employ a museum professional, then you may wish to appoint a Conservation Adviser who can work alongside the Curatorial Adviser. The Area Museum Councils (AMCs) are encouraging greater contact between museums and independent conservators in their regions through joint professional meetings and informal events. For further information on finding an independent conservator see Appendix 2.

General Advice on Working with Conservators

What Kind of Conservator do you Need?

Independent conservation practices are as variable as the client bodies for which they work. Some have a particular specialism e.g. easel paintings or textiles, while others work on a broad range of social history oriented materials or objects. An increasing number now operate as technical consultants, advising on the museum environment, storage or display, or providing basic collection care training for staff and volunteers.

Many conservators operate as sole traders. There are also loose co-operatives where two or more conservators will collaborate on a larger project. Larger practices employ specialists or can put together a team of freelance conservators for a specific project. When selecting a practice it is important to ensure that there are enough sufficiently skilled staff to do the work you need and complete it on time.

If you are working with a conservation practice for the first time, ask for copies of CVs of key members of staff. It is normal to obtain references from recent clients, who might also be willing to provide other information through an informal telephone call. If it is their remedial conservation skills that you are interested in, you may be able to see examples of current projects in the studio. A visit to the studio or workshop is always a useful indicator of the professionalism of the conservator. Check that the workspace is self-contained, fitted for the purpose and well organised, and look for signs of good practice in handling and storage of objects.

If you are considering contracting a conservator for survey work, ask to see examples of survey forms and analysis of data. Detailed final reports produced for previous clients are likely to be confidential and therefore not available. But you may be able to see an executive summary.

You should have a clear idea of the range of skills and experience you need for each project commissioned. You may wish to contact several conservation practices to field an opinion and ascertain likely costs before selecting one for the job. Otherwise, follow one of the tendering procedures outlined on page 22.

Principles of Good Conservation Practice

Conservators respect the following principles. They should:

- attempt to understand the intentions of the makers or creators of the object, and take this into account in any proposed treatment;
- adhere to the highest standards of treatment, regardless of the monetary value or quality of the object;
- maintain the highest practicable quality, even though circumstances (including the brief) may limit the extent of treatment;
- provide advice or treatments only within the limits of his or her professional competence and the available facilities;
- seek the advice and assistance of other professionals where necessary;
- report to the client any significant changes in the proposed treatments, and secure agreement before proceeding;
- not provide treatment that extends beyond that required by the brief, or that is less than necessary or already agreed;
- use only techniques and materials that, to the best of current knowledge, will not harm the object, nor impede future treatment;
- ensure that techniques do not have an adverse effect on the object and that, where applicable, they are reversible;
- use those materials that are most easily removable, where there is a choice;
- retain and record material removed from an object, which should be returned with the object;
- retain direct responsibility for the object when work is delegated or sub-contracted; document fully any necessary restoration or reconstruction work;
- not keep secret any details of techniques or materials used;
- not alter an object without justification - any changes must be fully documented;
- not intend to deceive - the extent of any restoration work should be detectable but not conspicuous.

Some conservation professional bodies are in the process of introducing an accreditation scheme. The Association of British Picture Restorers (ABPR) and the British Antique Furniture Restorers' Association (BAFRA) have had a special membership status for highly experienced conservators for many years. In 2000 the Institute of Paper Conservation (IPC) will join with the Society of Archivists (SoA) and the United Kingdom Institute for Conservation (UKIC) to launch a joint accreditation scheme. Information about a conservator's accredited status will be included on their entry on the Conservation Register database. For further information about accredited conservators contact the relevant professional bodies.

Remedial Conservation Projects

Deciding What Needs to be Done

You must work with the conservator to define what is needed, and to see the work through. There should be trust and respect between you.

Initial discussions may take place at the museum, or at the conservator's place of work. At this meeting you should try to define the problem, assess the scope of the work, determine your respective roles and responsibilities, and set up suitable lines of communication. You may find it useful to draw up a list of questions to ask the conservator before the meeting.

Ask whether the conservator intends to charge a fee for the preliminary examination, particularly where the examination is more than just the basis of a cost estimate. You should also ask whether the conservator plans to sub-contract any of the work.

The Brief

After your initial discussion, you will be ready to brief the conservator in more detail. A well-prepared brief will lead to a better understanding of the work and will allow the conservator to submit an accurate specification and costing.

Be prepared to discuss the brief with the conservator before it is mutually agreed.

The Written Brief

The *brief to the conservator* must cover the following points:

- the nature of the object (e.g. its history and significance, previous conservation treatments);
- a description of the problem and the work to be done on the object (e.g. the degree of cleaning needed and the expected level of technical investigation);
- the possible causes of recent decay or damage to the object;
- the proposed arrangements for communication after the job has started (e.g. will there be interim or progress reports?);
- the conservation documentation: what form should it take, who will receive originals and/or copies, will there be photographs, and who has publication rights?
- the nature and intensity of the object's current and proposed uses (e.g. storage, display, education, handling and working);
- restoration or reconstruction: how much is needed, how visible should it be, and how reversible will it be?
- the need for advice on post-treatment care (e.g. about storage, loans, use, handling or display, including the structure and materials of any recommended mounts, packaging etc.);
- details of ownership (unless confidential), or confirmation that you have authority to commission conservation;
- earliest date for delivering the object to the conservator;
- any necessary completion date;
- delivery and collection arrangements;
- insurance arrangements, including agreed value of the object(s), where appropriate.

Initial Conservation Assessment

The brief will provide the terms of reference for the conservator's assessment of the work. A conservator will normally report in writing, providing enough information for you to understand the treatment options and their implications. The report should also include expected completion dates and estimated costs.

The cost estimate may be liable to change if the conservator has not been able to conduct a full diagnostic examination (see below). Proposed treatments may therefore have to be modified as more is learnt about the object. To prevent costs spiralling out of control, clients frequently set limits. You may prefer to ask the conservator to estimate upper and lower cost limits for the work.

Try to maintain the agreed schedule. If you deliver the work late, the conservator may have to move another project into the time originally allotted to yours.

The Contract

When you finally agree to use the services of a conservator in a specified way, you enter into a contract with that conservator. Prepare a written contract to make all the agreed key points explicit - especially if the project is large or important. The contract may be in the form of a letter commissioning the work and specifying any conditions. Ask the conservator to confirm in writing that they will undertake the work as specified.

Elements of the Contract

The agreement with the conservator must cover the following points:

- the exact work to be done, with selected options for treatment;
- the basis for the charge, including labour and materials, technical examination, documentation, VAT, and any ancillary costs such as collection, delivery, or insurance;
- the stages at which payments are to be made;
- the conservator's obligation to agree any treatment with you or your delegated staff and also to discuss preliminary examination reports (including photographs or drawings);
- your date for delivering the object and its associated documentation;
- the need for, and nature of, post-treatment reports and documentation;
- completion and collection dates;
- payment terms;
- insurance arrangements which cover the conservator to work on any appropriate premises, including your own.

Some contracts may need to cover the following additional considerations:

- is your (or the owners) prior consent needed before the conservator can take sample(s) from the object? Will samples be retained as part of the examination records, or returned with the treated object?
- if you are not the owner, do you have the owner's written permission for the work?
- will you permit the conservator to refer in any way to their work on your object in any discussions, lectures, publications etc?
- under what arrangements may the conservator sub-contract any of the work?
- is there any specific security requirement for your object?
- will you require early notification if the actual cost appears likely to exceed the estimate? Do any increases need to be approved in writing?
- if the conservation practice is large, who will be the main point of contact during each stage of the project?

10 The essential points of atypical contract are listed above. You may also want to build in stages at which the contract can be mutually broken off without liability (except for any payments already due).

Full Examination and Report

Prior to the agreement of a contract, the conservator may only have briefly assessed the object - probably as the basis of a rough cost estimate or work schedule. This initial conservation assessment may be sufficient in many cases, but in others a fuller examination and comprehensive preliminary report will be required before the conservation work can proceed. This may be the only way to produce enough reliable information to determine effective courses of treatment. The report will also serve as a record of the object before the conservation work begins. You will probably want a copy of this report as soon as it is produced rather than at the end of the project, so ask for it - both in your brief and in the contract.

The conservator will want to see not only the object, but also any documentation available relating to its history, storage or display environment and previous treatments. The examination will be thorough, and may include chemical or other technical analyses. Ask for an explanation of anything that is unclear or unfamiliar.

If an examination technique holds certain risks, or could alter the appearance of the object, the conservator should ask your permission before proceeding. Similarly, if any treatment agreed on the basis of the preliminary examination report is subsequently changed, the conservator should obtain your permission. Changes agreed over the telephone should be followed by written confirmation.

The following list contains the main elements of a comprehensive preliminary examination report. This should be used as a guide only, as not every project will require all the points and the degree of detail required will vary.

A Comprehensive Preliminary Report

This must include, when appropriate, the following:

- the date of examination, and name of the examiner;
confirmation of the identification of the object(s);
- a description of the object(s) (e.g. materials and structure) and how the description was obtained;
- any indications of forgery;
- any safety risk from sources such as structural instability or hazardous materials;
- a description of deterioration, including earlier alterations, and how this information was obtained;
- an interpretation of observations and analyses in relation to proposed treatments;
- all suitable options for treatment, including details of methods, materials, time and costs;
- the proposed treatment, with explanation justifying the selection of this option;
suggested post-treatment conditions: conservator and curator should discuss how far the 'ideal' conditions for the object can be achieved in its eventual location - a factor that may have implications for the conservation treatment.

If you are asking a conservator to produce a report that will be used as a specification for an invitation to tender, make this clear to the conservator at your very first meeting. The conservator will need to know if she is eligible to bid for the work after having produced the report. You, the contractor, will have to make that decision. In any case, it would be unethical to use a conservator's report to obtain a costing from another, rival conservator without the originator's full knowledge and permission.

The Treatment and its Documentation

Will the object(s) receive the correct treatment?

The quality of conservation work that the object receives will depend on the professional competence of the chosen conservator. Conservators draw on their training and experience to judge which treatments or other actions are appropriate. You are also protected by

the codes of practice established by professional conservation bodies. Some important principles of good conservation practice are listed in the Introduction.

A conservator cannot be held responsible for problems caused by poor post-treatment care and, consequently, you should not expect a conservator to offer a guarantee. However, they should certainly correct faulty work, should this occur.

Documenting the work

A conservator has an obligation to document his or her work in detail. The information becomes an intrinsic part of the history of the object, so you should retain all treatment records. Always request archival quality for recording materials such as paper and inks, and photographic processing. If you want the report in a particular format, such as 'Modes', or to be compatible with a particular computer programme, make sure this is included in the brief.

A full documentation history of a conservation project will include records of the preliminary examination and of the techniques, treatments and materials used. The names of all people involved in the project, and references to any published material related to the object, treatments and examination techniques should also be recorded. Where possible, photographs taken before, during and after treatment should be included. The conservator may wish to hold a copy of the records, but the originals should go to the museum commissioning the work. The contract is unfulfilled until these originals are received. A photocopy of the conservator's report is unlikely to contain sufficient detail, especially of photographs. A conservator or researcher wishing to examine records in the future will want access to the best possible documentation, so museums must take responsibility for caring for this documentation.

After treatment

The conservator will return the object after completion of the work, together with any necessary post-treatment advice. Much of the advice will probably concern general or specific preventive conservation

measures. General comments could include recommendations on relative humidity levels, or protection from high light levels or dust. Comments on specific issues such as mounting or framing must be requested in the brief.

Details of the object's prior storage and/or display environment will help the conservator to devise a suitable post-treatment regime. It would obviously be a waste of money to return a conserved object to the conditions that helped cause the damage. But the object's introduction to a new environment should be carefully managed - a sudden change, even to 'better' conditions, creates an environmental shock and could lead to more damage.

When the conservator's work is finished, the museum is once again responsible for the preservation of the object. You must decide whether you will act on the post-treatment advice you have been given. If you decide not to follow the advice, you should justify your decision in the object or treatment records.

Safety, Security and Insurance

Safety

An object requiring remedial conservation work will probably have to be taken to the conservator's premises. As soon as it is moved, the risk of damage, deterioration or theft is increased. Ensure that both you and the conservator agree on arrangements for the safety and security of the object.

Review the conservator's procedures and facilities for safeguarding your object from interference, theft, and environmental and physical hazards. The conservator should understand and operate within current health and safety legislation and guidelines, such as the Control of Substances Hazardous to Health (COSHH) regulations and risk assessment. You could ask about the use of goggles and dust extraction, for example. Also ask about the conservator's emergency response plan in case of fire, flood or building damage.

12 An object can be damaged during transit - most obviously through physical damage caused by careless handling or bad packaging. Less obvious, perhaps, is the stress caused by environmental changes during transit. If your object is particularly vulnerable to this kind of stress, make sure that the temperature and humidity of its present environment are maintained during transit and on the conservator's premises. If you are unsure of the best type of container and packing material to use, take advice from the conservator or ask them to pack the object.

Security

Don't forget to ask for identification and receipts when depositing or receiving the object. Ensure that the conservator will house the objects in a building designed to make penetration through the walls and roof difficult and time-consuming. All doors, windows and skylights should be protected by drop shutters, interior grilles or bars. Small, high-value objects such as jewellery must be housed in a separate, secure storage cabinet when not being worked on. It is essential that the building be protected both by an automatic fire/smoke alarm and by an intruder detection system. Both systems should signal an alarm condition by means of a monitored line to an alarm company's central station. Further advice is available from the MGC's Museums Security Adviser and on the MGC website (www.museums.gov.uk), and from the AMCs.

Insurance

Insurance arrangements must be clarified early on. Insurance must cover risks during transport, on the conservator's premises, for third-party liability, and for professional negligence. Check if the museum's insurance is valid for conservation work undertaken off-site. The conservators policy will probably cover most of these risks. Professional negligence cover is now readily available for conservators, so insist that the contractor be properly covered.

If the objects are to be covered by the conservator's insurance then ask to see proof that the policy is current and that your object will be covered. Remember that they may need a valuation for insurance purposes.

The UK's national museums are not allowed to arrange insurance, because the Government underwrites normal insurance risks.

Museum and Conservator: Managing Co-operation

In most cases, the partnership between museums and conservators is a fruitful and successful one. In the rare case of an apparently intractable dispute, arbitration is available through the Arbitration and Conciliation Service (ACAS) or one of the bodies that operates a professional accreditation scheme.

Collection Condition Surveys

Many museums now incorporate condition surveys as a normal part of their conservation planning. Collection condition surveys are undertaken in order to assess (audit) the condition of collections as a whole. The benefit of a collection condition survey is that it will collect baseline information that will help you to:

- make definitive, quantifiable statements about the condition of the collections;
- compare condition of different parts of the collection or collections in different locations;
- produce evidence about the damage that has happened to the collection and link it with the conditions in the museum;
- prioritise actions to improve the condition of the collection;
 - estimate the cost and time to achieve the improvements needed.

Types of Condition Surveys

In-depth survey of a small number of objects

These are normally commissioned from a conservator who specialises in a particular type of material or artefact. They involve a thorough examination of each object and result in a detailed written report as outlined in the previous section. Such surveys often include an estimate of the time and cost of the remedial conservation work required. You might commission one of these to help plan your conservation expenditure, or to support a fundraising application, or to help plan an exhibition.

Sample surveys

These involve a limited examination of a selection of objects from the whole collection. The results are normally presented as statistics accompanied by a summary of conclusions and recommendations. This will provide useful information about the collection as a whole, which can then be used to make decisions about priorities for collections management. Conservators with experience of a range of collection types normally undertake such surveys.

A warning

Although condition surveys are an effective collections management tool, carrying out such surveys is not a simple task and a number of aspects of the process require a great deal of preparatory work. For example, in order to obtain reliable results, the statistical methods used may need to be tailored to the museum's particular circumstances. Taking short cuts may result in some fundamental and expensive mistakes.

What Does a Sampled Collection Condition Survey Involve?

Decide exactly what you want from the survey

Before you begin examining the collection, you should have a clear idea of the purpose of the exercise. When you know the sort of information you want, you can decide what type of survey and what level of investment is appropriate. A consideration of the likely results will help you to decide what are the right questions to ask in the survey. How, for example, will knowing that there are several hundred years' worth of conservation work needed on your prints and drawings collection be of benefit if you only have one conservator in your museum and there is no prospect of additional funding? If what you need to produce is a general action plan then you may not want to spend too much finding this out. On the other hand, if you want to put together a grant bid for a large conservation project, then it would be appropriate to obtain a precise estimate of the work needed.

Ask yourself if a condition survey is the best way to achieve your aims

Is a survey the best way to obtain the results that you want? Collection condition surveys will produce data that can be presented as simple charts that are an effective way to communicate detailed information. However, it may not be necessary to undertake a collections condition survey to make your case. It could be possible to produce a report from information that is already available.

Once you have decided to go ahead with a collection condition survey, you should prepare a brief and find a consultant to carry out the work. You can find details of conservators that carry out condition surveys from the Conservation Register (see Appendix 2) or your local AMC. The advantages and disadvantages of using in-house staff to carry out the survey are discussed later in these Guidelines.

Only experienced conservators should carry out survey work. Although it may appear to be a simple and mechanistic process, it is based on a thorough understanding of materials and their decay processes. An ability to judge the severity and implications of damage is vital. Inexperienced conservators or non-conservators often concentrate on trivial surface detail when making their assessments.

Briefing the Conservator

Unless you are very experienced in carrying out collection condition surveys you will probably only be able to provide the conservator with an outline brief. You will need to spend some time working with them to define the project so that it produces the results that you want.

First discuss with the consultant what you want to get out of the survey. Give them as much information as possible about:

- the nature of the collection to be surveyed (e.g. its history and significance, previous conservation treatments);
- the purpose of the survey (conservation programme, grant application);
- the locations to be surveyed; any deadlines to be met;
- limitations on access.

Together with the conservator you will then need to:

- agree the methodology and terminology;
- design the sampling procedure;
- decide whether a pilot survey is necessary;
- agree the type of analysis and report required.

These are discussed in more detail below.

Agree the methodology

It is necessary to identify what are the key questions to ask and design an effective survey form. Keep the number of questions to the minimum, as unnecessary questions add to the time needed to carry out the work and so increases the cost. The categories of questions likely to be included are:

Administrative data - location of the objects, identification and description.

Descriptions of damage - typical categories are major or minor structural damage, surface damage, disfigurement, chemical deterioration, biological attack, harmful old repairs and accretions. Other factors could be specific to your collections; e.g. a geology collection would probably have a category for 'pyrite decay'.

Condition grade score - this records the severity of the damage in the context of the collection and most surveys use a four-level condition-scoring scheme, fair to unacceptable. These are defined below.

Condition grade	
Good	Object in the context of its collection is in good conservation condition, or is stable
Fair	Fair condition, disfigured or damaged but stable
Poor	Poor condition, and/or restricted use, and/or probably unstable
Unacceptable	Completely unacceptable condition, and/or severely weakened, and/or highly unstable and actively deteriorating, and/or affecting other objects

Other questions

It may also be useful to record curatorial value, probable cause(s) of damage and deterioration, repackaging and conservation needs, priority action for conservation and quality of the storage environment.

A team of two people often carries out the actual survey as this speeds up the process and results in fewer errors. If a particular type of collection is to be surveyed, at least one of the surveyors must have specialist knowledge of the subject. The lead surveyor may need to work with a number of specialists. If curatorial value assessment is to be included, then a curator should do this separately from the conservation survey.

Terminology

It is vital that those commissioning the survey and those undertaking the survey agree on the terminology to be used. A simple example of confusion is where one person considers a fragment of pottery to be 'a complete pot shard' whilst another describes it as a 'broken pot'. There is no correct answer, only one which is appropriate to your collection. If you plan to leave that sort of decision to the surveyor, insist that they record the information. Everyone using the survey results will then interpret them correctly.

Any abbreviations of terms used during the survey must be included on all survey forms.

Design of the sampling procedure

The sample must be statistically valid or the survey results will have little value. If possible, objects to be surveyed should be selected by random sampling from the catalogue. If this is not possible, then a two-stage systematic sampling procedure can be used. Samples of each storage location (box, palette or shelf) are selected and then a proportion of objects at each location is surveyed.

The size of the sample will be determined by the objectives of the survey, the variety of the collections and accommodation, the size of the collection and the degree of accuracy required. A recent project to develop standard methodology for surveying library material found that a sample size of 400 objects per type of collection (books, videotapes etc.) was sufficient. The American Library of Congress surveyed 20 million books using a sample of 1000. Keene (1996)

suggests that for museum collections the minimum useful sample size in surveys is approximately 1000 objects. Careful sample design will keep the number of objects to be surveyed to a minimum.

The reliability of the results is improved if fewer objects are looked at in detail rather than a larger number cursorily examined.

Experienced conservators will be familiar with sampling methods and so able to advise. If the survey is to be of a large and diverse collection or is to be regularly repeated, it is worth discussing the sampling method with a statistician.

A pilot survey

A pilot survey is advisable for large-scale surveys. It enables the surveyor to fine-tune the methodology to ensure that it will provide the information you want it to and that the work can be completed on schedule. A pilot survey and analysis of the results will normally take up to 20% of the total survey time available. The surveyor will discuss with you any changes to terminology, sampling procedure etc. suggested by the pilot study.

Analysis of the data and reporting the results

You will probably want the surveyor to produce some or all of the reports that you need. If there are deadlines to meet, such as revision of the forward plan, make sure that this is all agreed in advance with the surveyor and specified in the contract.

It is important to allow sufficient time for the analysis of the data and writing the report. It is not unreasonable for a consultant to spend up to a week doing this. The most useful report is one that provides a concise and accurate analysis, with well thought out conclusions. Remember that surveys are only an initial step in the ongoing process of improving collection care.

16 Typical reports are analyses of collection condition by:

- collection type or material; location;
- the whole institution.

A discussion of critical factors together with recommendations for improvements and a summary for presentation to the board of governors or trustees will also be useful. There may also be reports on specific studies that you requested, such as a comparison of the condition of objects on display with those in storage.

It is worth remembering that funding bodies are increasingly requiring that grant applications be based on work priorities identified through a survey or formal review.

You should also consider whether it would be useful to combine the results of the proposed survey with other information that the museum holds. This could be from previous surveys, environmental records, treatment files or reports of damage to objects caused by accident or neglect. You must include this requirement in the brief and contract if you want the consultant to do this.

Most important of all, remember to specify that a summary of the salient points i.e. the overall state of collections and conclusions is included in all of the reports. Once all the above has been agreed, a contract for the project can be prepared.

The preliminary work and a pilot study, if required, will enable the main survey to run smoothly.

What Museum Staff may Need to do During the Survey Work

The surveyor's work will be made easier if the following preparatory work is carried out. Although the consultant could do some of it, everything you do in preparation will reduce the time taken and, ultimately, the cost. Discuss these issues in advance, when the brief or contract is being agreed.

Elements of the Contract

The agreement with the consultant must cover the following points:

- the basis for the charge (time or project-based), VAT and any ancillary costs;
- the stages at which payments are to be made;
- the individuals who will undertake the work; the date the survey should commence;
- the type and format of reports required; completion date;
- payment terms;
- insurance arrangements, covering the conservator to work on the museum's premises.

Some contracts may need to cover the following additional considerations:

- whether you permit the conservator to refer in any way to your survey in any discussions, lectures, publications, etc;
- under what arrangements may the conservator subcontract any of the work;
- working arrangements on-site. Any specific security requirements, hours of access, support; requirement to notify if the actual cost appears likely to exceed the estimate;
- named individuals who will be the main point of contact during each stage of the project.

Prior to the survey:

- discuss the objectives of the survey with the consultant (as described above);
- provide information about the museum - the consultant may send a questionnaire or ask to see copies of policy documents or previous reports;
- provide relevant health and safety information; agree areas of responsibility and timetables;
- prepare the collection inventory and, if possible, reduce any backlog;
- provide a plan of the space to be surveyed, including a shelving plan.

Access:

- clear the area around the collection to be surveyed, removing empty packing cases and old showcases etc;
ensure that all objects are on shelves or pallets;
arrange security clearance and provision of keys, passes or supervision;
- inform members of staff about the project and arrange for the surveyor to have uninterrupted access to the space and collections.

Facilities:

- provide trolleys, trucks and ladders as necessary (remember your health and safety responsibilities);
- ensure there is adequate illumination in the survey areas;
- provide a large clear workspace;
- provide a suitable power supply, if required.

After the survey:

- assist the consultant, who may want to visit in order to check queries on the survey forms concerning identification, location, or to discuss some of the results;
- contribute to the analysis of the results by identifying areas of correlation that would be useful; supply related information, such as environmental data, that might be required;
- be prepared to comment on a draft of the report.

Using the Results of the Survey

Once the survey is completed and you have received the report, allocate some time to review the findings and decide how you will use of the results. Typical follow-on projects are:

Planning a programme of conservation work

Surveys are often the first step in developing a planned conservation programme. Use the survey to identify collections in greatest need of conservation and prioritise these for treatment. For example, if the survey shows that there is a serious insect infestation in one of your stores, you might decide to deal with that problem first

Preparing a grant application

Many of the grant-giving bodies such as the AMCs or the Heritage Lottery Fund (HLF) now expect applications for conservation programmes or environmental improvements to be based on the findings of a survey. If, for example, you are planning to apply for a grant for a new costume gallery and your survey showed that 400 hours of conservation work were necessary to make the collection suitable for display, you should include this information and how it was arrived at in your application. The survey may have also established the major causes of damage to the collection and indicate work that would improve the situation, such as the need to reduce light levels or install a dehumidifier.

Basis for tendering

Once you have an accurate picture of the amount of conservation work required on your collection, you can use the survey results to put the conservation work out to tender. Most specialist conservators will not submit a tender for remedial conservation treatment without first subjecting the artefacts to a detailed examination. Therefore, this type of survey is most suitable for prioritising items for treatment (as mentioned above) or assessing general collection care work such as re-boxing or radiography of archaeological finds.

Follow-up surveys

A useful way to monitor the benefits arising from a survey is to repeat the process after a period of years. If you intend to do this comparative type survey you must collect exactly the same type of data as in the original survey, looking at the same collections in the same location.

Another type of follow-up survey is one that examines in greater detail a proportion of the collection. For example, if your initial survey has identified that your geological collection is in the poorest condition, you could re-examine this collection in more detail. A two-stage survey will avoid collecting too much data about stable parts of the collection and will give the opportunity to involve another specialist.

18 Using In-house Staff or a Consultant

Only a relatively small proportion of UK museums now employs conservators. Those that do may wish them to carry out any collection condition surveys required. The arguments for and against this approach are presented below.

The advantages of using in-house staff are:

- in-house staff understand the role of the collection and the likely use that will be made of it; surveying a collection is an excellent way of getting to know it; staff who participate in the collection of data have greater faith in the results;
- observations made during the survey may provide information on other aspects of managing the collections;
- they are more familiar with the site;
- there are no additional security requirements;
- the survey can be carried out over a long period and this may fit better with the museum's other activities.

The disadvantages of using in-house staff are:

- they have an inherent bias because of their familiarity with the collections and the institution, and may be less objective;
- they are more aware of the consequences of the results, such as the impact on their workload or changes to established practices;
- they may not have the specialist expertise in the type of collection to be surveyed;
- they may be diverted from other important projects that the museum is committed to.

The advantages of using a consultant are:

- s/he is likely to have more experience of surveying collections than museum staff;
- s/he will agree a timetable and is likely to keep to it;
- the surveying process is less likely to disrupt the normal museum services.

The disadvantages of using a consultant are:

- the museum will need to allocate funds to pay the consultant;
- identifying and selecting a suitable consultant can be time-consuming;
- s/he is likely to be less familiar with the museum and its collections than the staff;
- once a consultant finishes a project, their knowledge and experience of carrying out collection condition surveys leaves with them.

Using a Combination

If your museum employs an in-house conservator, then working with a freelance conservator can give them a refreshing new perspective on the collection. The benefits of familiarity with the collections can be combined with the dispassionate approach of an independent conservator. If the museum does not have an in-house conservator it may be possible to commission a private conservator to undertake the survey and have them assisted by a member of staff. This will allow the conservator to pass on advice in an informal way about the collection as work progresses. If some objects are packed in a complicated way the member of staff could prepare the collections in advance to speed up the process. Even if you commission two external conservators it may be useful to have a member of staff working alongside them. This would allow the conservators to explain problems as they arise and, perhaps, engender a greater sense of ownership of the final report and recommendations in the staff.

Further Reading

Dollery, D (1994) 'A Methodology of Preventive Conservation for a Large and Expanding and Mixed Archaeological Collection', *Preventive Conservation, Practice Theory and Research*, International Institute for Conservation: London.

Eden P, Dungworth N, Bell N and Matthews G (1998) *A Model for Assessing Preservation Needs in Libraries*, British Library Research and Innovation Report 125, British Library Research and Innovation Centre: London 84 - 110.

Grant A (1994) *Spectrum Essentials*, Museums Documentation Association: Cambridge.

Keene S (1996) *Managing Conservation in Museums*, Butterworth-Heinemann.

This contains detailed advice on the survey and examples of forms used by the author.

Kenyon J (1992) *Collecting for the 21 st Century: A Survey of Industrial and Social History Collection in the Museums of Yorkshire and Humberside*, Yorkshire and Humberside Museum Council: Leeds.

Checklist for Planning a Collection Condition Survey

There are practical issues associated with the survey that you need to consider. Use the simple checklist overleaf to ensure you have thought things through. Make sure you are clear how you wish to allocate responsibilities. If you are working with a consultant this will help you to structure the brief.

Checklist	Notes
<i>Survey format</i>	
Who will design the survey format and questions?	
Will you use a standard survey form?	
If so have you identified a form to copy?	
Do you want the results on a disc?	
Will the database chosen for the survey be compatible with your software?	
Will you specify sampling method or allow the consultant to choose?	
What will the sample size be based on?	
<i>Access</i>	
Will there limited hours of access?	
Have you informed the consultant of these?	
Will there be other people using the collection whilst the survey is being carried out?	
Have you informed the consultant of this?	
<i>Trial or pilot survey</i>	
Will there be a trial survey?	
Will the same team undertake it?	
Will the results of the pilot study be incorporated into the final report?	
<i>Report</i>	
Have you specified how you want the information to be analysed?	
Have you specified what the surveyor will provide comments on?	
Do you want recommendations presented as graphs, tables or narrative text, or a combination?	
Will you specify what percentage of time to be spent surveying and analysing?	
Do you want to receive the raw data as collected?	
Do you have deadlines for when the report must be presented?	
<i>Payment</i>	
Will you pay by the day or by the project?	
(Depends on factors such as whether the consultant provides advice and how much support you provide).	
Are there to be different charging rates for time spent surveying and time spent writing the report?	
Will you pay the surveyors' expenses?	
Have you agreed when the invoices will be sent?	

Other Types of Survey Useful for Collections Management

There are other types of survey that assess how well a collection is being managed. These do not focus on the condition of the objects but examine broader issues. Some useful examples are described briefly below.

Collection core surveys

These investigate the preservation environment in its broadest sense. They may include assessments of issues such as institutional policies, procedures, staffing levels and experience, the history of the institution and its collections, space, shelving, resources available for preventive and remedial conservation and building maintenance. These surveys can range from a simple report following a visit by a conservator or collections manager, to an examination of the whole institution that takes several days to complete and results in a long and detailed written report. A good example of a format for this type of review is:

National Institute for Conservation/Getty Conservation Institute (1995) *The Conservation Assessment: A Tool for Planning, Implementing and Fundraising*, National Institute for Conservation/Getty Conservation Institute.

Examining the collection and museum against published standards

This may be useful in comparing different sites or museums within a service to allow priorities for improvements to be drawn up. One example is:

Museums & Galleries Commission (1997) *Levels of Collection Care: A Self-Assessment Guide for Museums and Galleries*, MGC: London.

Space audit

This analyses the space allocated to the various functions of the museum and reviews how these spaces interrelate. They are useful in the initial stages of planning a major re-build or extension.

Environmental conditions

Analysing the data from temperature, humidity, light, ultraviolet light and possibly pollution monitors can

enable you to determine if any of these factors are harming the collections. One of the most useful surveys a museum can undertake is for pest infestation and housekeeping. A useful guide is:

Museums & Galleries Commission (1998) *Integrated Pest Management: Practical, safe and cost-effective advice on the prevention and control of pests*, MGC: London.

Documentation and labelling

Evaluate the labelling and marking of the collections, and the documentation, to check if they meet appropriate standards for security and safety. For more information refer to:

Museum Documentation Association (1997, second edition) (ed. Cowton, Jeff), *Spectrum: The UK Museum Documentation Standard*, mda: Cambridge.

Location audit

Checking the location of objects against that stated in their documentation. This is a simple and quick type of audit and is likely to be increasingly specified as a performance indicator for museums.

Tendering

22 The booklet *Guidelines for the Commissioning and Undertaking of Conservation Work* provides an overview of the various ways in which an organisation can commission conservation work. It was produced by the UK Institute for Conservation (UKIC), on behalf of all the conservation professional bodies in the UK and Ireland. Copies are available free of charge from the MGC, AMCs and the National Council for Conservation-Restoration (NCC-R). See Appendix 3 for contact details.

The Guidelines grew out of independent conservators' concern to ensure that all commissioned conservation work was allocated fairly and without prejudice. They recommend adopting one of the four schemes described below and that the client identifies some Pre-Qualification criteria. These include previous experience of similar projects, access to appropriate equipment or facilities, qualification and experience of employees, etc. Further examples of criteria are included in the Introduction to these Guidelines.

The four schemes are:

Nomination

This is the assigning (or nominating) of an approved conservator to carry out the work without any competitive quotations. It is most suitable for projects where the outcome is advice, a written report, a small-scale treatment or the preparation of a tender specification. It is most useful when specialist expertise is only available from one conservator or practice. It may seem a cheaper option to the client, but there is no comparison of pricing with other providers.

Competitive quotation

This is obtained from two or more conservation practices. It is most suitable for projects where alternative treatments are possible or the treatment cannot be specified precisely. For this reason it is useful for trials but can also be used for small treatment programmes. It is cheaper than the formal tendering process, but the client will need a reasonable level of technical knowledge to evaluate the different proposals.

Competitive tendering

This is a single-stage tendering process. It is used whenever a precise specification of the work can be provided, but because of the cost and time involved it is normally only appropriate for projects costing over £10,000.

The process requires the client to prepare, or have prepared for them, an accurate specification of the work required. Contracts for which competitive tenders are being sought are normally advertised in professional journals or newsletters, and there is a closing date for submissions. In order to be fair to all those tendering, each should have access to the same information. If a conservator is contracted to prepare the specification, it should be made clear to them at the beginning of the process whether they would be eligible to submit a tender. It is common practice for the client to exclude a conservator who prepared the specification from tendering, but to retain them to provide additional advice if required.

Two envelope system

This enables the client to evaluate quality and cost as two separate objects. It is a flexible system suitable for the selection of conservators for treatment programmes, surveys of collections or the co-ordination and supervision of large contracts involving conservators from different disciplines. This system allows a decision to be made on the best technical solution without this being influenced by the cost. The technical proposal and the costing are submitted in separate envelopes and the client evaluates these before opening the costings. The selection process identifies the best technical proposal.

Useful References

Conservation Forum (now NCC-R) (1998) *Guidelines for the Commissioning and Undertaking of Conservation Work*, Conservation Forum: London.

Department for Culture, Media and Sport (DCMS) (1998) *Manual of Procurement*, DCMS: London.

Glossary of Terms

Conservation

Actions designed to care for and treat objects of artistic or historic heritage, or of natural scientific interest, with the least possible intervention. There are two broad approaches:

- remedial (sometimes referred to as 'practical' or 'active') conservation attempts to retard current deterioration (e.g. by cleaning, stabilisation and consolidation);
- preventive (or 'passive') conservation attempts to prevent future deterioration (e.g. during treatment, in storage and in use).

Condition Survey

An analysis of the overall condition of a collection. It can be a statistical (or sample) based study, or a condition assessment of individual objects, often termed an item-by-item survey. For a large collection, a statistically generated sample is a more efficient way of gathering information. An item-by-item survey will provide detailed information on the specific conservation needs of each object.

Conservation Documentation (or Treatment Report)

The records produced during conservation work relating to (i) the history and condition of the object, (ii) any treatments undertaken, and (iii) recommendations for future care.

Conservator

Someone with specialist education, training and experience who carries out conservation in compliance with a professional code of ethics and/or rules of practice.

Conservator's Assessment

A simple, initial assessment that may be made on-site through visual examination. A full preliminary examination (see below) may be required before the work begins.

Examination Records

The information resulting from examination - including that of any samples.

Preliminary Examination

The process of fully determining the nature and condition of an object prior to work being carried out.

Preservation

The process of maintaining an object in an unchanged state (as far as possible), by retarding deterioration and preventing damage.

Reconstruction

An attempt to recreate the object, partially or wholly, based on little original material but drawing on clear historical, scientific, pictorial, literary, archaeological or other similar evidence.

Restoration

Action taken to modify the object, over and above that required for its preservation. Restoration aims to preserve and reveal the aesthetic and historical value of an object. It should maintain respect for the remaining original material, and retain evidence of the earlier state.

Appendix 1

Conservation-Restoration: The Options

24 Owners or curators of works of art or objects of cultural value that need cleaning or repairing may be confused by the apparently different services on offer. Should they go to a conservator or a restorer, and what do these different professionals do? This Appendix seeks to solve the dilemma and offer reassurance that conservation and restoration are aspects of the same process and frequently go hand in hand. The difference in terminology has to do both with how much you wish to recover the original appearance of the object, and what medium the object is made of. The debate over whether to aim for an historically accurate 'renewal' of the original appearance and function of an object or intervene only slightly to arrest further deterioration is discussed later. First, let us look at the confusion that has arisen over the role of conservators as opposed to restorers.

Both conservators and restorers share the following aims:

- to preserve the integrity of the object, including evidence of its history and manufacture;
- to use methods that are reversible and can be removed without damage to the object itself;
- to record all stages of their work.

The more specific goals of conservation are to:

- establish the causes of deterioration;
- arrest deterioration;
- prevent further deterioration;
- reveal what has become hidden and, by investigation, lead to a fuller appreciation of the object.

Restoration goes further. On the whole it is used to mean restoring something to how we think it looked at some earlier time. Knowing how this was, at any particular moment in its history, can of course be difficult. While reviving the bright colours of a painting through cleaning may help us to increase our appreciation and enjoyment, there is no guarantee that what we see are indeed the tones that the artist painted because pigments alter with time.

Examples of how the Terms Restorer and Conservator are used for Different Media In the case of paintings, the same person often carries out both conservation and restoration on the same object. The professional, traditionally called a restorer, will:

- inspect the painting carefully, possibly using a microscope, and perhaps more sophisticated methods, like X-radiography. This inspection will show how the picture was painted, what changes the artist may have made, what previous restorers have done, and what is wrong with it now. (It might be dirty, its varnish may have darkened, it may be cracking, its canvas might be distorting, and so on.);
- if necessary, improve the physical support of the painted surface and consolidate the areas of flaking or cracking paint with a harmless, stable and safely removable substance;
- undertake cleaning, depending on what the client agrees is safe to do without damaging the artist's original work and intentions;
- if there are visible losses to the picture, 'restore' those areas in order to provide visual continuity, but in such a way that future experts will be able to see what has been done (e.g. by using different materials which will show up under ultra-violet light or by employing a visibly different and therefore distinctive brushstroke). The aim is to present as complete an image as possible, striking a compromise between the normal effects of ageing and the viewer's preference to see as little obvious damage as possible.

In the case of ceramics, the professional may be called a conservator or restorer. Ceramics are usually valued for their perfect surfaces and blemish-free glaze. Restoration is undertaken when the ceramic is broken or when missing parts make it unattractive. Also when it is cracked, disfigured due to dirt and staining, or when old repairs are breaking down.

The extent of the restoration is dependent upon the owner's requirements. For physical safety, it may simply need cleaning and bonding with a stable but reversible

adhesive. However, a skilled ceramics conservator has the ability to restore an object to a virtually perfect appearance. Not only can all the tiniest fragments be reassembled, but also cracks can be made to disappear, missing parts replaced and lost areas of glaze and decoration totally and accurately restored.

Is it right to go that far, or should the conservator take pains to ensure a distinction between the old and the new, sufficient for an expert to discern the repair? Or would it suffice to know that the different materials used would be revealed by inspection under an ultra-violet lamp?

In practice, from a conservation point of view, it is important that the treatment does not cause further damage and that all restorations are reversible. All replacements should be accurate and as little as possible of the glazed surface should be obscured by retouching. When the concern of the owner is that the object is restored to its original beauty and that the restoration is not obvious, these demands need not be incompatible with the ethics of conservation.

One solution might be to restore a plate perfectly on its upper surface while not covering over the cracks on the reverse. In another case, coloured resin fills can replace missing chips and lost areas of glaze, but require no retouching onto the original.

In the case of furniture, restoration is a necessary part of conservation. Imagine a period chair, broken and missing a leg. A pure conservation approach would be to do no more than repair the broken parts (after inspection, and using reversible materials and documenting everything). But then what? The chair will still have only three sound legs! Each time it falls it will suffer more damage. This is contrary to the purpose of conservation, which is "to prevent further deterioration". The common sense option is to provide a substitute leg, i.e. to restore the leg; and what more appropriate than to restore it to match the other three? There is nothing wrong with this, provided that the new leg remains discernible as a replacement by

somebody who knows about chairs, that the replacement is documented and that deception is not intended.

The solution is usually less obvious than in the simplified example given above. Nevertheless, in every case we need to know with absolute certainty what the missing part looked like. This means that the furniture restorer should select replacement materials very carefully, to ensure that they are discernible now and in the future. The aim is always to replace as little as possible of the original material.

The example of the chair illustrates another purpose of restoration: that it may be necessary to make something function. A chair cannot be sat upon unless it is structurally sound; a clock cannot show the time unless it is in working order, a steam engine cannot haul a train and evoke past times unless it is fully restored; and a rocking-horse cannot be ridden unless it is structurally safe.

Finding a Compromise between an Object's Integrity and Ability to Function

When restoration is necessary how far should it go? This is where views differ, where the debate becomes heated and simple answers are elusive. Restoration gained a bad reputation in the past from the over-zealous cleaning, renewal or reconstruction of buildings and paintings. People now realise how much was lost and sometimes react strongly against any replacement or renewal.

A museum curator may want to display a rare and early rocking-horse, perhaps one having historical connotations, exactly as it is today, with its paintwork faded or chipped and its mane hairless. In contrast, a private owner may wish to present a similar piece to a child and will want its paint gleaming, with a fresh mane, leatherwork and fittings - indeed will want it to look 'as new'. The creature may become only a semblance of its original self, with much of the original completely destroyed by the very process of restoration. The cost might be as great as buying new.

People often like metal objects to look bright and shiny. They may be unaware that in polishing the surface layers they may remove important details indicating use, maker or manufacture, or even decorative or historical features, or that the patina may be original and applied by the maker. In the past metal was not always expected to have a shine.

The current trend is for the owner to like their art to look 'clean'. Hence a stained and yellowed master drawing on paper may have to be bleached and washed using chemicals which may shorten its life. Is this a price worth paying?

With working objects, like clocks, steam engines or fairground organs, running wears them out, requires new parts, and puts them at increased risk, as when cars are driven and aircraft flown. As parts are replaced, the artefact loses its original identity and eventually becomes a mere replica. One solution might be to build and operate a replica while doing the minimum needed to stabilise the original and then keeping it unused in ideal conditions. Another solution might be to restore the object to working order but to keep the original parts in store.

The dilemma when conserving musical instruments is no less painful. To put an early instrument into playable condition invariably requires replacement of its original parts and for that reason there are very few unaltered early instruments extant. Playing the instrument then imposes stresses and risks, but consigning it to a showcase and creating a replica for use is only a visual solution: the original sound can only be made by the original unaltered instrument.

Inappropriate restoration may adversely affect an object's long-term preservation. Repairing a damaged textile by re-embroidering or renewing missing or worn areas may do more harm than good. This can be avoided in a museum where the object is needed only for display in controlled conditions, but may be necessary in the home, for instance on a damaged chair cover.

In a church the visitor (congregation) will want their wall paintings, furnishings and other objects to remain usable and a visible contribution to the building and religious experience. This is a requirement that demands sensitive compromises.

The Basic Precepts that Restorers and Conservators Share

Accepting that restoration is often a necessary part of conservation we need some underlying principles.

These are:

- the original object is of paramount importance;
- what has happened to it in the past may be historically important;
- do not destroy or hide evidence of original construction or composition, modifications or use (if this has to happen, the evidence should be properly recorded);
- always do the least possible;
- any changes to the object should be discernible in the future.

The past history of an object may be revealed through a complex series of alterations, each of which leaves physical signs, which can all too easily be destroyed.

The principle of not destroying or hiding evidence is especially relevant where restoration is needed to disguise damage (e.g. covering over cracks), the more cautious conservation approach being only to minimise the effect of the damage.

These principles allow for the possibility of change in artistic appreciation and fashion, and improvements in the technologies for preservation. In the art and antiques trade, whereas full replacement or reconstruction was once essential to maximise the monetary value of an object, less drastic approaches are becoming usual. Indeed, with some types of art object, buyers may actually prefer to see the condition and extent of the original. Faded colours, blemishes and flaws are often acceptable and welcome evidence of antiquity.

The trend now is to do less to artefacts to avoid drastic treatments, and to stress prevention rather than cure. The inevitable process of decay can be dramatically slowed, not only by the conservator's intervention, but by reducing light levels and by controlling humidity and temperature. This is as true for objects held by private individuals as for those in public care.

Taking such care in the long run saves expenditure on correcting later damage. It also makes the best of a costly treatment that can never make the object completely immune to damage from its surroundings. Conservators and restorers take such factors into account when inspecting or working on objects and will advise on appropriate preventive measures.

The Responsibilities of Conservators and Restorers

Putting all these principles together and making a judgement is not easy. That is why the skills of a qualified trained and experienced conservator or restorer are essential. Only such a person is able to make these judgements, taking into account the wishes and expertise of the curator or owner, who may not be immediately aware of all the issues and will need advice on the options available. Decisions may be required not just at the outset of the project, but frequently during the course of the work, as details are revealed and recorded and have to be instantly conserved and perhaps restored. The range of technical, aesthetic and art-history knowledge demanded for such judgements can be immense.

The people who conserve and restore are as diverse as the settings in which they work. Those who work in museums and galleries are usually required to take a cautious approach. They are expected to place greater emphasis on retaining what is original, on minimal replacement, and on doing no more than is required for display or long-term preservation. Ideally, the object will be replaced in an environment where it will be protected from rough treatment and its condition will be carefully monitored. Those who operate privately, whether for museums or private individuals, share the

same professional and cautious approach as those working in museums.

But a conservator can normally offer a range of options between replacement and reinstatement, taking note of the wishes of their client, of the future home of the object, and of its future use. They may also need to take into account the implications and cost of their work in relation to the object's monetary value.

Conservators and restorers who belong to a relevant professional organisation agree to abide by a code of practice, which embodies the principles listed above. They are expected to operate in an ethical and businesslike manner.

One professional standard applies throughout, but the nature of the object and of its context is taken fully into account when applying that standard.

The Client's Role

It is up to the client to:

- choose a conservator or restorer whose approach is compatible with the needs of the client and whose experience includes similar objects or projects;
- discuss carefully what is to be done with the conservator or restorer, noting his or her advice, in order to arrive at an agreed brief;
- come to a clear understanding with the conservator or restorer about the extent of restoration to be carried out, whether restrained repair and preservation or more extensive gap-filling, in-painting and reconstruction;
- be available to be consulted by the conservator during the course of the work.

The curator's first responsibility is to the preservation of the object in his or her care because it will, in the course of time, be handed on to succeeding generations. They will not want too many options to have been closed by over-zealous and ill-advised restorations.

28 High-quality conservation or restoration is the result of an effective partnership between client and professional. A professional approach will ensure that matters of terminology take second place to the primary purpose of doing the best for the artefact for the pleasure and enlightenment of present and future generations.

This Appendix attempts to capture ideas which are not universally shared and which change with passing fashion. The underlying debate will never be resolved, but it is hoped that this brief essay at least brings some of the issues to the fore and thereby makes a contribution to the better care of our cultural heritage.

Appendix 2

Finding a Conservator

The Conservation Register

The MGC, together with Historic Scotland's Conservation Bureau, maintains a national Register of conservation practices (telephone: 020 7233 3683 or 0131 668 8668 for details of the Register). Those conservators accepted on to the Register must meet certain specified standards related to training, experience, security etc. - although inclusion does not constitute a recommendation or a guarantee of quality. A Register search provides a list of five conservation practices that undertake the type of work required. All museums that are members of an Area Museum Council have free access to the Conservation Register.

You will find more good advice in the leaflet *Choosing a Conservator- The Conservation Register*, available free from the MGC. If you are planning a major conservation project then you should also read the publication *Guidelines for the Commissioning and Undertaking of Conservation*, which is available from the National Council for Conservation-Restoration (see Appendix 3 for contact details). This provides much useful advice and describes various methods of obtaining quotations and tendering.

A standard form of contract for conservation projects is now available through the United Kingdom Institute for Conservation (see Appendix 3 for contact details).

Criteria for Inclusion in the Conservation Register

These are taken from the Conservation Register's Guidelines for Applicants.

- The applicant (the owner or manager of the workshop or studio) should normally have at least seven years' practical conservation experience in their field. This should include a period of recognised training appropriate to the work undertaken and at least two years' supervised work after completion of training. The applicant should be able to demonstrate that they have continued to develop their professional competence following their initial training.
- If the applicant employs staff, information should be submitted on the level of supervision given to employees in relation to their experience. The applicant should normally be a member of a recognised professional conservation body such as the Association of British Picture Restorers (ABPR); the British Antique Furniture Restorers' Association (BAFRA); the International Institute for Conservation (IIC); the Institute of Paper Conservation (IPC); the Scottish Society for Conservation and Restoration (SSCR) or the United Kingdom Institute for Conservation (UKIC).
- Of the five referees provided, at least four must demonstrate that the applicant offers a conservation service of good standard in an efficient and businesslike manner.
- At least 75% of the activities of the business should normally be conservation and/or conservation care-related. Records of conservation treatments must be maintained. These should be made available to the owner of the object and a copy also retained by the conservator.
- All working and storage areas must have adequate security in relation to the value of the objects normally worked on.
- Workshops, stores and staff must be adequately covered by appropriate insurance. Unless insurance cover for objects in their care is included as part of the conservator's insurance policy, clients should be routinely advised by means of a written disclaimer that such insurance is their responsibility.
- Professional verified business accounts must be maintained.
- The [conservation] practice must normally have completed risk assessments, e.g. COSSH, for all treatment processes undertaken in their work and submit documentation to that effect with the application.

Appendix 3

Professional Organisations

30 This section gives contact details for the conservation professional bodies that have special categories of membership or operate an accreditation scheme.

National Council for Conservation-Restoration (NCC-R)

The NCC-R (active since 1993), formerly known as the Conservation Forum, is an umbrella organisation whose primary aim is:

To promote the conservation of and public access to cultural heritage objects and collections in the United Kingdom and Ireland for the public benefit.

The NCC-R remains the collective voice of the many conservation disciplines. Whilst the constituent bodies retain their individual identities and spheres of activities, they work together through NCC-R on matters of common concern. Together, these professional bodies represent over 2000 practising conservators and restorers.

The NCC-R is currently concerned with the key issues and initiatives that involve the whole profession and are of concern to client bodies and members of the public. These include:

- launching a professional accreditation scheme for conservators;
- assessment and monitoring of professional standards;
- continuing professional development;
- standard form of conservation contract;
- insurance tailored for the conservation profession.

National Council for Conservation-Restoration
161 Maldon Road
Colchester
Essex CO3 3BL
Tel/Fax: 01206 544 112
E-mail: jonathan@rhys-lewis.freeserve.co

Association of British Picture Restorers
Station Avenue
KewTW9 3QA
Tel/Fax: 020 8948 5644
E-mail: abprlondon@aol.com
Website: www.abpr.co.uk

British Antique Furniture Restorers' Association
The Old Rectory
Warmwell
Dorchester
DT2 8HQ
Tel/Fax: 01305 854 822
E-mail: headoffice@bafra.org.uk
Website: www.bafra.org.uk

British Society of Master Glass Painters
Conservation Committee
5 Tivoli Place
Ilkley
West Yorkshire LS29 8SU
E-mail: secretary@bsmgp.org.uk
Website: www.bsmgp.org.uk

Institute of Paper Conservation
Leigh Lodge
Leigh
Worcester WR6 5LB
Tel: 01886 832 323
Fax: 01886 833 688
E-mail: clare@ipc.org.uk
Website: <http://palimpsest.stanford.edu/ipc/>

Scottish Society for Conservation & Restoration
The Glasite Meeting House
33 Barony Street
Edinburgh EH3 6NX
Tel: 0131 556 8417
Fax: 0131 557 5977
Website: <http://www.sscr.demon.co.uk/>

United Kingdom Institute for Conservation
109 The Chandlery
50 Westminster Bridge Road
London SE1 7QY
Tel: 020 7721 8721
Fax: 020 7721 8722
E-mail: ukic@ukic.org.uk
Website: <http://www.ukic.org.uk/>

Society of Archivists (Preservation and
Conservation Group)
40 Northampton Road
London
EC1 R0HB
Tel: 020 7278 8630
Fax: 020 7278 2107
E-mail: societyofarchivists@archives.org.uk
Website: <http://www.archives.org.uk/index2.html>

Irish Professional Conservators' and Restorers'
Association (IPCRA)
Cathedral Workshop
1 Exchange Place
Lower Donegal Place
Belfast
BT1 2NA
Tel: 01232 333004

Institute for the Conservation of Historic and
Artistic Works of Art in Ireland
c/o National Gallery of Ireland
Merrion Square
Dublin 2
Tel: 00 353 1 1661 5133