*June 2019*

[*This is a template. Adapt this document to correspond to your own guidelines, working practices, logo and policies.*]

[*This model plan has been developed to guide museums through the process of developing a Collections Care and Conservation Plan.  Please consider all the statements carefully and do not include them in your plan if they are not relevant to you or you do not carry out the action described.*

*Replace the words in [square brackets] with the information requested.  Where the word [person] appears, it is best to use a person’s role (eg. curator, volunteer documentation officer) rather than a person’s name.  Make sure there is no ambiguity.*

*Section 13 of the Plan gives you the opportunity to list the steps you are going to take to improve practice.  Prioritise; set a timescale and state who is responsible for carrying the project forward.  Remember to include these objectives in your museum’s Forward Plan.*

*The Plan is a working document and must be available to all staff working with the collections.  It can be added to and annotated during the course of its lifetime to create a reference manual which sets out how you care for and conserve your collections.]*

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[*museum name*]

[*name of author and date*]

**Care and Conservation Plan**

**Introduction**

This plan sets out the actions required to implement the Care and Conservation Policy. It should be read in conjunction with the Forward Plan, Building Plan and Emergency Plan and any other plans affecting the collection and the museum buildings.

The museum has access to conservation advice from the regional Conservation Development Officer and refers all concerns to an appropriate conservator.

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    * References and where to find them (Benchmarks, etc)
    * Copies of factsheets: Signposts, handling guidelines, etc

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1. **Monitoring And Improving Environmental Conditions Including Temperature, Relative Humidity (RH), Light And Dust**

**TEMPERATURE AND RELATIVE HUMIDITY**

* The museum monitors and records the temperature and relative humidity (RH) in the storage and display areas.
* The museum aims to maintain conditions which are as stable as possible, within the range 12 - 20ºC and 45 – 60% RH.
* Special conditions are required for the following parts of the collection [*list items/groups*]
* If the results fall outside the desired range, the cause is investigated and action taken to improve conditions.

**The current system:** [*describe the areas monitored and the devices used*]

* Readings are recorded in [*describe the mechanism for recording - notebook, computer - who does this and the frequency of measuring*]. A sample recording sheet is available at Appendix [*reference*].
* The readings are examined by [*person*] and reported to [*person*].
* All readings are filed in [*location*] and kept for [*number of years/months/weeks*].
* The devices are calibrated by [*person*] at [*date/period*] intervals.

**The museum uses the following to control the environment:**

[*Describe any air handling equipment, humidifiers, dehumidifiers, fans, heaters, radiators etc, where they are located and how they are used (e.g. if the gallery has a high RH the dehumidifier should be brought in from the store and switched on to 50%RH. It must be emptied at least daily.* ]

Items which require extremely dry environments are kept in polythene boxes with a sufficient quantity of silica gel. The silica gel is checked by [*person*] every [*period of time*] and replaced with dried silica gel when necessary.

**LIGHT**

* No objects are exposed to direct sunlight. Items are protected from unnecessary exposure to light. Storage areas are kept dark when not in use.
* Ultra violet light is excluded as much as possible. All windows are either blocked off or fitted with UV filter film. Lights are replaced with UV free alternatives wherever possible. Fluorescent lights are fitted with UV filters. Windows fitted with UV filter film are tested for effectiveness at [*period*] intervals by [*person*]. The results are recorded in [*location*].
* Lights are tested for UV emission using a UV meter from the Conservation Development Officer at [*period*] intervals by [*person*]. The results are recorded in [*location*]*.*
* Visible light levels are checked using the museum’s light meter whenever the lighting is changed (lights are moved or new bulbs fitted). This is the responsibility of [*person*]. The results are recorded in [*location*].

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* Light sensitive material is not left on permanent display
* The museum aims to keep light exposure for very light sensitive material to below 150,000 lux-hours per year and for less sensitive material to below 300,000 lux-hours per year. The museum will remove items from display if light exposure is deemed to be too high
* Light dosimeter cards are placed next to the following objects [*list of items*] and examined at the end of each season by [*person*] for changes. Any changes are recorded on the items’ catalogue entries and notified to the appropriate authority so that action can be taken

**DUST**

* Items are not left exposed to dust if possible
* They are protected by being kept in boxes or display cases or covered with Tyvek or cotton sheets or acid-free tissue paper
* If items need to be protected with polythene sheet or bubblewrap they are first covered with acid-free tissue paper
* Covered objects and items in boxes are clearly marked to identify the object inside

**Dust levels in the museum are controlled by**

* Good housekeeping
* Keeping external doors and windows closed whenever possible
* Using mats to trap dust from shoes at entrances
* Keeping the approach to the museum clean
* Sealing off areas where building work is taking place

It is the [*person’s*] responsibility to ensure the measures relating to monitoring and improving the environment are in place, communicated and acted upon.

1. **Managing The Threat From Pests**

**Quarantine**

* Any item coming into the museum (even returning items which have been on loan) will be kept separate from the collection until it has been fully examined by a member of staff.
* Items which have to be stored in the museum awaiting examination will be kept away from the collection or isolated by placing them in a polythene box or wrapping them in polythene sheet.
* They will be examined as quickly as possible, especially as there is a risk of mould if they are damp.

**Monitoring**

* Sticky traps are placed in the storage and display areas, along the floors, near doorways and windows, on window sills and occasionally on shelves, to monitor insect activity especially in dark, quiet areas.

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* Hanging sticky traps are used if any moths are seen.
* The traps are checked monthly between February – June and then every two months for the rest of the year (e.g. February, March, April, May, June, August, October, December)
* A sketch plan is made of each room, showing the location of the traps.
* The traps are numbered.
* Each trap is examined by [*person*] in a good light using a magnifying lens and the results recorded in [*location*]. An example of the record sheet is available in Appendix [*reference*].

If pests are found which are potentially harmful to the collection or building, a conservator is asked for advice which is then acted upon.

**Prevention**

* No food or drink is kept in any area where the collections is stored or displayed.
* Good housekeeping keeps the museum clean, reducing the risk of infestation by pests.
* Windows and doors are kept shut whenever possible.
* Open windows are protected with mesh screens to prevent insects flying in.
* All vents in the walls are protected with mesh screens.
* Gloves are worn when handling objects to reduce the possibility of mould growth and pest attack.
* Areas which are full of boxes and objects are deep cleaned every [*period of time*].
* All boxes and items are removed from shelving, the shelving and walls wiped clean with microfibre cloths and then the items are replaced.
* Good ventilation is important for preventing mould and pest infestation.
* Storage areas are opened up regularly and fans used to encourage air flow when necessary.
* Items are stored in a way to allow air movement around them.
* Boxes are kept at least 75mm (3 inches) away from walls.
* Items are not stacked against external walls.
* Any mouldy or pest infested packing material must be thrown out promptly. Any information on it is recorded first.

It is [*person’s*] responsibility to ensure the measures relating to pests are in place, communicated and acted upon.

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1. **Housekeeping**

* No polishes, cleaning agents or sprays are used in the museum without the advice of a conservator.
* Synthetic (not feather) dusters are used on walls, lights and ceilings (not objects). Microfibre cloths (dry or dampened with clean water), brushes and vacuum cleaners are used for cleaning the building.
* Housekeeping does not include cleaning objects on open display.

**Storage areas:**

* Floors are cleaned by [*person*] every [*period of time*].
* Shelves, worksurfaces and ledges are wiped down with microfibre cloths by [*person*] every [*period of time*].
* Rubbish bins are emptied daily by anyone using the store.
* Windows are cleaned internally with microfibre cloths by [*person*] every [*period of time*].
* Walls are wiped down by [*person*] every [*period of time*].
* The areas are deep-cleaned by [*person*] every [*period of time*].

**Display areas:**

* Floors are cleaned by [*person*] every [*period of time*].
* Cases are wiped with microfibre cloths by [*person*] every [*period of time*].
* Shelves, worksurfaces and ledges are wiped down with microfibre cloths by [*person*] every [*period of time*].
* Rubbish bins are emptied daily by [*person*]
* Windows are cleaned internally with microfibre cloths by [*person*] every [*period of time*].
* Walls are wiped down by [*person*] every [*period of time*].
* The areas are deep-cleaned by [*person*] every [*period of time*].

**Other areas:**

* Floors are cleaned by [*person*] every [*period of time*].
* Shelves, worksurfaces and ledges are wiped down with microfibre cloths by [*person*] every [*period of time*].
* Rubbish bins are emptied daily by [*person*]
* Windows are cleaned internally with microfibre cloths by [*person*] every [*period of time*].
* Walls are wiped down by [*person*] every [*period of time*].
* The areas are deep-cleaned by [*person*] every [*period of time*].

It is the [*person’s*] responsibility to ensure the measures relating to housekeeping are in place, communicated and acted upon.

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1. **Conservation Cleaning Of Objects On Open Display (or in open storage)**

Wherever possible, items are displayed in secure, suitable cases and stored in appropriate boxes. Where this is not possible, items on open display or in storage are carefully monitored and recorded and appropriate action taken when damage or dirt is observed.

Delicate items including [*list, e.g. oil paintings, gilded frames, decorated wood surfaces, musical instruments, clocks*] should only be cleaned by an appropriate conservator.

More robust surfaces may be cleaned using the brush vacuum method:

* Examine the object carefully and make sure that it is safe to clean
* Choose a suitable soft brush and make sure the metal ferrule is protected with masking tape.
* Cover the crevice nozzle of a vacuum cleaner with a piece of soft net or tights, held in place with a rubber band.
* Taking care not to touch the object with the vacuum cleaner hose or other apparatus, gently brush the loose dust off the object into the nozzle of the vacuum. Do not touch the object with the nozzle.
* Examine the object again, record your treatment of it and any observations.

It is the [*person’s*] responsibility to ensure the measures relating to conservation cleaning of objects on open display are in place, communicated and acted upon.

1. **Documentation Of The Condition Of The Collection And Of Any Treatments Carried Out On Objects**

The museum retains records of every treatment carried out on objects, by in-house staff or external conservators. Records are added to an item’s catalogue entry according to the procedures set out in the museum’s Documentation Procedural Manual.

Every object loaned from the collection has its condition checked and recorded when it leaves and returns to the museum. A copy of the form used is available at Appendix [*reference*].

The condition of the collection is audited by [*person*] every [*period of time*] and the results recorded in [l*ocation*]. Changes in the condition of any object are notified to [*person*] for action in line with the museum’s Forward Plan.

It is the [*person’s*] responsibility to ensure the measures relating to documentation of the condition of collections and any treatment carried out are in place, communicated and acted upon.

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1. **Storage Materials And Methods**

* The museum is aware that all items should be protected in inert packaging materials in a way which protects the item from chemical or physical damage.
* The museum replaces any inappropriate boxes and packing materials with acid-free card and tissue paper, polythene, inert styrene or polypropylene boxes and polythene foam as detailed in [Signposts Factsheet No 2 Materials for Storage and Display.](https://collectionstrust.org.uk/resource/materials-for-storage-and-display/) Please see Forward Plan for details of conservation budget each year for repacking.
* Items which are too large to be boxed are covered with acid-free tissue or Tyvek fabric.
* No item is stored on the floor. Very large items are stored on padded chocks or a pallet. Smaller items are stored on shelves which are lined with polythene Jiffy foam or acid-free tissue.

It is the [*person’s*] responsibility to ensure the measures relating to storage materials and methods are in place, communicated and acted upon.

1. **Display Materials And Methods**

* The museum uses secure display cases whenever possible.
* New cases are chosen in accordance with the [*Signposts Factsheet No 2 Materials for Storage and Display*](https://collectionstrust.org.uk/resource/materials-for-storage-and-display/) and the [*Guidance Note Choosing New Display Cases*](https://collectionstrust.org.uk/resource/choosing-new-display-cases/).
* Older cases are sealed with Moistop film or Dacrylate 103-1 varnish before reuse.
* Cases are lined with acid-free board, washed unbleached calico or scoured polyester cotton cloth or polythene foam.
* Mounts are made with materials as listed in [*Signposts Factsheet No 2*](https://collectionstrust.org.uk/resource/materials-for-storage-and-display/)*.*
* Mounts are constructed to provide support for the object and protect it from physical damage during display and handling.
* No object is permanently changed by its attachment to a mount.

Items on open display are checked by [*person*] every [*period of time*] and their condition recorded [*method/location*]. Items on open display are secured using the least damaging method possible.

It is the [*person’s*] responsibility to ensure the measures relating to display materials and methods are in place, communicated and acted upon.

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1. **Transport Methods**

* Items are carried between rooms and buildings in suitably padded containers.
* Items always travel with sufficient documentation.
* Items are never left unattended in vehicles.

Changes of location longer than part of a day are recorded in writing at the end of each working day, according to the procedures set out in the museum’s Documentation Procedural Manual.

It is the [*person’s*] responsibility to ensure the measures relating to transport methods are in place, communicated and acted upon.

**9. Loans out**

* All requests for loans from the collection will be assessed individually before a decision is reached.
* The condition of the items, the location, environment and security of the venue, transport and personnel involved will all be reviewed.
* Every borrower will be asked to fill out a Facilities Report using the template available from the [*UK Registrars Group*](https://www.ukregistrarsgroup.org/) or the museum’s equivalent.
* For particularly valuable items, additional information regarding display cases and security may be requested using the supplementary templates available from the [*UK Registrars Group*](https://www.ukregistrarsgroup.org/)or the museum’s equivalent.
* Security, environmental, handling and conservation conditions are stipulated by the museum and agreed with the borrower as part of the loan agreement.

**Agreed loans:**

* The condition of the item to be loaned will be recorded using the Condition Check form available at Appendix [*reference*], and with photographs showing every angle and with existing damage clearly marked.
* This form is part of the loan agreement and a copy will accompany the object when it leaves the building.
* Every item is checked against the original condition report when it is returned to the museum.
* The loan and the outcome of the check is recorded on the item’s catalogue entry according to the museum’s Documentation Procedural Manual.

It is the [*person’s*] responsibility to ensure the measures relating to loans out are in place, communicated and acted upon.

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**10. Loans in**

* The museum treats all incoming loans according to the requirements set out in the loan agreement between it and the lending authority.
* The museum will notify the lending authority if there is any change in its circumstances which mean that it can no longer meet the requirements set out in this agreement.
* If the lending body does not supply a Condition Check Form for each object, the museum will use its own Condition Check Forms as at Appendix [*reference*].

It is the [*person’s*] responsibility to ensure the measures relating to loans in are in place, communicated and acted upon.

**11. Workforce Training**

It is the museum’s policy that only people who have received appropriate training should handle items from the collections.

[*Describe how the museum ensures anyone (paid staff, volunteers, visitors or researchers) who handles collections is suitably trained. This may include in-house induction and training courses, a period of shadowing an experienced member of staff, the provision of clear guidance materials, factsheets, posters, etc*]

**12. Plans for Improvement**

[*Set out here the areas of Collections Care and Conservation where the museum plans to improve its practice in the next 2 to 3 years, for example making improvements towards meeting the basic standards featured in this model plan, reboxing a particular collection, introducing a new monitoring regime, having a collection condition audit by the Conservation Development Officer perhaps. Make sure these actions feature in the museum’s Forward Plan.]*

**13. Appendices**

[*Include here any model forms, proforma, guidelines, lists of contacts and suppliers that you would find useful to keep in one place for ease of reference*.]

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