

[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 amend them to make sure they are accurate and relevant and that the museum carries out the actions as 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 (e.g. curator, volunteer documentation officer) rather than a person's name. It may be helpful to refer to the museum's staffing structure or diagram to identify the roles.

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 (paid and volunteer) 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.]

[*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 (CDO) and refers all concerns to an appropriate conservator.

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1. Overview of current Collections Care and Conservation

The plan sets out how the museum currently undertakes Collection Care and Conservation. Collection Care activities are carried out by *[list teams or roles involved]* who report to *[list the managing body]* by *[describe the method, e.g. monthly/annual report, representation at meetings]*. Conservation of the collection is carried out by or supervised by appropriately trained and experienced conservators.

Records of Collection Care activities are kept in *[describe how the records are kept]*. The museum retains records of every treatment carried out on objects, by in-house staff or external conservators. Records are added to an object’s catalogue entry 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 documentation of the condition of collections and any treatment carried out are in place, communicated and acted upon.

2. Collection Needs and Vulnerable Objects

The condition of the collection is recorded by *[detail the persons or teams responsible]* who check objects selected by *[detail the selection process, e.g. random sampling across the displayed and stored collections, additional checks on objects being put on display or returned to storage, annual checks on vulnerable or significant objects, a survey of all the objects every XXX period of time]*. The results are recorded in *[location]*.

A copy of the form used is available at Appendix *[reference]*.

Changes in the condition of any object are notified to *[person]* for action in line with the museum’s Forward Plan.

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

The museum is aware that the following objects and collections have particular needs or are vulnerable: *[complete the following table]*

Object or Collection type	Need or Vulnerability	Required actions
<i>e.g. archaeological metal</i>	<i>Requires very dry conditions</i>	<i>Kept in sealed polythene boxes with silica gel which is checked annually and dried out when necessary</i>

3. 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 – 20°C and 45 – 60% RH.

Special conditions are required for the following parts of the collection *[list objects/groups and detail the conditions needed]*

If the conditions fall outside the desired range, the cause is investigated and action taken to improve conditions.

The current system is *[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 maintain conditions at e.g. 50%RH. It must be emptied at least daily.)]

Objects which require extremely dry environments are kept in well-sealed display cases or acrylic, polythene or similar inert material boxes with a sufficient quantity of silica gel.

Objects which require a strictly controlled RH are kept in similar containers with a sufficient quantity of conditioned silica gel. The silica gel is checked by *[person]* every *[period of time]* and replaced with dried or conditioned silica gel when necessary.

The equipment which controls the environment is checked *[state the period]* by *[person/company]* and repaired and maintained by *[describe the arrangements for repairs/maintenance]*.

Light

No objects are exposed to direct sunlight. Objects are protected from unnecessary exposure to light, e.g. when the museum is closed. 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 such as LED bulbs 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]*.

Non-LED lights are tested for UV emission using a UV meter (available on loan from the CDO) 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].

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 objects from display if light exposure is deemed to be too high.

Light dosimeter cards (or dataloggers) are placed next to the following objects [list of objects] and examined at the end of each season by [person] for changes. Any changes are recorded on the objects' catalogue entries and notified to the appropriate authority so that action can be taken.

Dust

Objects 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 covers or acid-free tissue paper. If objects need to be protected with polythene sheet or bubble wrap, they are first covered with acid-free tissue paper. Covered objects and objects 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.

4. Managing the Threat from Pests

Quarantine

Any object coming into the museum (even returning objects which have been on loan) will be kept separate from the collection until it has been fully examined by a member of staff.

Objects 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 on a pad of acid-free tissue or wrapping them in polythene sheet, lined with acid-free tissue. They will be examined as quickly as possible, especially as there is a risk of damage 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. Hanging sticky traps or special wall-mounted traps are also 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

All staff are trained to be aware of the risk of pests and know how to report any observed pests or suspected pest damage. Areas where vulnerable parts of the collection are kept are identified and labelled so that staff are aware to take extra care in these areas.

Impermeable gloves are worn when handling objects to reduce the possibility of mould growth and pest attack.

No food or drink is kept in any area where the collections is stored or displayed. Waste bins are emptied daily. 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.

Areas which are full of boxes and objects are deep cleaned every *[period of time]*. All boxes and objects are removed from shelving, the shelving and walls wiped clean with microfibre cloths and then the objects 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. Objects are stored in a way to allow air movement around them. Boxes are kept at least 100mm (4 inches) away from walls. Objects are not left on the floor or stacked against external walls. Any mouldy or pest infested packing material is 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.

5. 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.

6. Conservation Cleaning of Objects on open display (or in open storage)

Wherever possible, objects are displayed in secure, suitable cases and stored in appropriate boxes. Where this is not possible, objects on open display or in storage are carefully monitored and recorded and appropriate action taken when damage or dirt is observed. Objects are not cleaned regularly, only when they require it, to prevent unnecessary abrasion and damage to the surface.

Delicate objects 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 covered with masking or electrical 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.

7. Documentation of the Condition of the Collection and of any treatments carried out on Objects

The museum keeps records of all condition checks carried out on objects and of any treatments carried out on objects in [\[location\]](#). Any conservator carrying out treatments on objects from the collection is required to supply copies of the treatment records in a format suitable for the museum's recording system. The details of the condition checks carried out on the collection are set out in Sections 2 and 12 of this Plan.

8. Storage Materials and Methods

The museum is aware that all objects should be protected in inert packaging materials in a way which protects the object from chemical or physical damage.

The museum replaces any inappropriate boxes and packing materials with more appropriate materials such as acid-free tissue paper or spider tissue, Tyvek fabric, polythene foam or polyester wadding covered with scoured cotton calico, and boxes made from acid-free card, polythene, inert styrene or polypropylene as detailed in *Signposts Factsheet No 2 Materials for Storage and Display* (downloaded from the Collections Trust website). Please see Forward Plan for details of the conservation budget each year for repacking.

Objects which are too large to be boxed are covered with acid-free tissue or Tyvek fabric. No object is stored on the floor. Very large objects are stored on padded chocks or a pallet. Smaller objects are stored on shelves which are lined with Jiffy polythene 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.

9. 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* and the *Guidance Note Choosing New Display Cases* (downloaded from the Collections Trust website).

Older cases are sealed with Moistop film or Dacrylate 103-1 varnish before reuse.

Cases are lined with acid-free board, scoured unbleached calico or scoured polyester cotton cloth or polythene foam. Mounts are made with materials as listed in *Signpost Factsheet No 2*.

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 (e.g. by drilling or using adhesive). Mounts are suitable padded and sealed to protect the object (e.g. metal hooks or pins are sealed with an inert varnish or heatshrink polythene tubing).

Objects on open display are checked by [person] every [period of time] and their condition recorded [method/location]. Objects 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.

10. Handling Methods

Only trained people are allowed to handle objects from the collection. The museum has written Guidelines for handling objects which all staff (paid and volunteer) and visitors must agree to follow before being allowed to handle objects. The handling of some objects may be restricted owing to the presence of hazards or principles of cultural sensitivity.

For the safety of both objects and people, impermeable gloves are worn by everyone handling accessioned objects.

[Museums may have different Guidelines for handling different collections. These can be attached as Appendices or kept as separate documents]

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

11. Transport Methods

Objects are carried between rooms and buildings in suitably padded containers. Always travel with sufficient documentation.

Never leave objects 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.

12. Loans in

The museum treats all incoming loans according to the requirements set out in the loan agreement between it and the lending body. The museum will notify the lending body 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.

13. Loans out

All requests for loans from the collection will be assessed individually before a decision is reached. The condition of the objects, 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* or the museum's equivalent.

For particularly valuable objects, additional information regarding display cases and security may be requested using the supplementary templates available from the *UK Registrars Group* 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.

If agreed, the condition of the object to be loaned will be recorded using the Condition Check form available at Appendix [\[reference\]](#), and with photographs showing all parts of the object 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 object is checked against the original condition report when it is returned to the museum. The loan details and the outcome of the check are recorded on the object'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.

14. Workforce Training

It is the museum's policy that only people who have received appropriate training should handle or work with objects from the collections.

[Describe how the museum ensures everyone - 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]

15. Plans for Improvement

[Set out here the areas of Collections Care and Conservation where the museum plans to improve its practice over the next 5 years, for example making improvements towards meeting the basic standards featured in this model plan, re-boxing a particular collection, introducing a new monitoring regime, having a collection condition audit. Make sure these actions feature in the museum's Forward Plan.]

16. 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.]

E.g.

- *Forms – for recording inspections, results, etc*
- *Contacts*
- *Suppliers*
- *References and where to find them (Benchmarks, etc)*
- *Copies of factsheets: Signposts, handling guidelines, etc*