

## PREVENTIVE CONSERVATION – GENERAL

**Baer, N. S.; Snickars, F. (Editors).** *Rational Decision-making in the Preservation of Cultural Property* Dahlem Workshop Reports. Dahlem University Press, Berlin, Germany (2002).

The term value is most often used in the context of relative monetary worth. It is in this context that economists and other social scientists have sought to define the value of such environmental goals as clean air and clean water, leading to concepts of "green values." Yet the terms implies more than simple financial valuation, especially when applied to often intangible public goods, as it also considers the relative place that such goals hold in the choices we as individuals and society as a whole make. Those charged with the stewardship of cultural property, be it an individual document in an archive, an historic landscape or an entire art city on the World Heritage List, are faced daily with decisions based on often conflicting value systems.

It has become obvious that public policy — as determined by such socioeconomic concepts as environmental accounting, cost-benefit analysis, sustainable development, valuation of loss of cultural property, and intergenerational equity — plays a major role in determining what cultural properties will be saved: which books, documents, artifacts, and monuments. So also, public policy determines which portions of our cultural history will be lost to decay and development.

In a synthetic approach, an international interdisciplinary group of experts drawn from the social and physical sciences together with specialists from the fields of architectural preservation, museums, and library and archive preservation confronted these issues. The usefulness of "World Heritage" as a planning concept, the mechanisms by which society sets its priorities, the balance between short- and long-term risk factors, the definition of what constitutes the artifact in the information age, and the validity of the application of the value systems of industrialized nations to the cultural property of developing nations are considered in the examination of the applicability of economic and other models to rational decision-making in the preservation of cultural property at the several levels of society and institutions.

**Cassar, May.** "Places" and "stuff": is it only the language of conservation that is changing? *Conservation of historic buildings and their contents: addressing the conflicts.* Watt, David; Colston, Belinda, Donhead Publishing Ltd., Shaftesbury (2003), pp. 41–51.

Taking the three thematic areas of sustainability—social, economic, and environmental—as the starting point, the author considers the wider context within which conservation of the material heritage is practiced. In this, it is argued that similar influences and pressures affect society, the natural environment, and the material heritage, yet nature conservation has both "natural" and "man-made" protection. Nature can renew itself if well managed, while material heritage cannot, and organizations supporting nature conservation have managed to raise public and political awareness in a way that conservation of the

material heritage has not. The author argues the merits of conservation of the material heritage as being the management of a nonrenewable resource and asserts that aligning material conservation with the ethical principles of sustainability will provide the societal context for wider recognition. She also argues that achieving a balance between conservation and access, as a cornerstone of heritage sustainability, will become a more realistic goal if conservation practitioners identify more closely with society's interests. One way in which this can be done is by involving communities in conservation decisions. The author uses examples of work undertaken by University College London's Center for Sustainable Heritage to illustrate certain points. (A.A.)

**Council of Europe, Committee of Ministers** Recommendation on Measures to Promote the Integrated Conservation of Historic Complexes Composed of Immovable and Moveable Property. (1998)  
<https://wcd.coe.int/ViewDoc.jsp?id=469477&BackColorInternet=9999CC&BackColorIntranet=FFBB55&BackColorLogged=FFAC75>

This Recommendation addresses the need to extend the protection of the built heritage by addressing historic complexes, that is, buildings and structures along with their contents. The document asks member states to identify and classify historic complexes (public and private) and to put in place legislation to provide for their protection. It also recommends sanctions to ensure that objects not be separated from their built environment and that incentives, such as tax relief, subsidies, and low-interest loans, be enacted to encourage preservation.

**English Heritage** *Conservation Principles for the Sustainable Management of the Historic Environment*. English Heritage, UK. (2006)  
[http://www.english-heritage.org.uk/upload/pdf/Conservation\\_Principles\\_2.pdf](http://www.english-heritage.org.uk/upload/pdf/Conservation_Principles_2.pdf)

The Principles, Policies and Guidance provide a framework for sustainable management of the historic environment, the essence of which is addressed in Principle 1. Principle 2 emphasises the potential for everyone to contribute to sustaining the historic environment. Principle 3 addresses the idea of the heritage values of places, and the concept of significance as the sum of those values. It is supported by guidance which proposes a \_'family' of heritage values and a process for assessing significance. Principle 4 defines conservation as managing change in ways that will sustain the significance of places. It is supported by policies and guidance that explain its application to an escalating range of actions, taking into account Principles 5 and 6, which are concerned with decision-making and the value and use of records. Whilst some of these policies have a close relationship to particular principles (for example \_'New work and alteration' to Principle 4.6), it is important that each is seen as a specific application of the Principles as a whole. Finally, the Principles acknowledge that the cultural and natural heritage values of places should be considered in parallel, fostering close working relationships between managers of cultural and natural heritage interests. (From EH website)

**English Heritage** *Guidance on the management of conservation areas*. English Heritage, UK. (2005)  
[http://www.english-heritage.org.uk/upload/pdf/Management\\_of\\_Conservation\\_Areas\\_20060320130528.pdf](http://www.english-heritage.org.uk/upload/pdf/Management_of_Conservation_Areas_20060320130528.pdf)

This guidance identifies the key aspects of good practice that need to be taken into account by local authorities in managing their conservation areas, whilst recognising that resources are limited and have to be prioritised. It aims to relate the designation and management of conservation areas to the principles of conservation management planning for historic places, outlines how the management of conservation areas relates to the new development plans system and provides references to other relevant information.

**Getty Conservation Institute** Conservation, the Getty Conservation Institute Newsletter – Environmental Management. (2007)  
[http://www.getty.edu/conservation/publications/newsletters/22\\_1/](http://www.getty.edu/conservation/publications/newsletters/22_1/)

Articles include:

*From the Outside In: Preventive Conservation, Sustainability, And Environmental Management*  
In the search for solutions that promote not only the conservation of material culture but also the conservation of the global environment, stewards of cultural heritage should review current approaches to environmental control and revisit traditional building design and use, as part of environmental management strategies for collections.

*Passive Design, Mechanical Systems, and Doing Nothing: A Discussion about Environmental Management*

Ernest Conrad, a U.S. engineer involved in the design of climate control systems; Tim Padfield, a consultant in preventive conservation who has worked at institutions in Europe and the United States; and Franciza Toledo, a private researcher and consultant in preventive conservation in Brazil, talk with Shin Maekawa and Jerrey Levin of the Getty Conservation Institute.

*Collections Care, Human Comfort, and Climate Control: A Case Study at the Casa de Rui Barbosa Museum*

After researching alternative climate control strategies for establishing safe environments for collections in hot and humid regions, the GCI is now collaborating with the Casa de Rui Barbosa Museum in Rio de Janeiro to test the applicability of the GCI's climate control strategy in a setting where human comfort is an important consideration.

*Our Lord in the Attic: A Preventive Conservation Case Study*

The GCI's Education and Science departments are working with colleagues in the Netherlands to develop a preventive conservation case study on an unusual historic house museum in the center of Amsterdam—a seventeenth-century canal house that holds a surprise in its attic: a Catholic church.

**Getty Conservation Institute** Conservation, the Getty Conservation Institute Newsletter – Implementing Preventive Conservation. (2004) [http://www.getty.edu/conservation/publications/newsletters/19\\_1/](http://www.getty.edu/conservation/publications/newsletters/19_1/)

Includes the following articles:

*Effective Preservation: From Reaction to Prevention*

While many professions have become exceedingly narrow, preventive conservation has evolved to become one of the most interdisciplinary of fields. It uses knowledge from materials science, building science, chemistry, physics, biology, engineering, systems science, and management, as well as a host of technical fields. Decision making in this context can be exceedingly complex—which is why many in the profession are turning to risk management approaches that embrace uncertainty.

*Sustainable Access: A Discussion about Implementing Preventive Conservation*

Sarah Staniforth, Richard Kerschner, and Jonathan Ashley-Smith—three conservators who have devoted much time and thought to the application of preventive conservation—talk with the GCI's James Druzik and Jeffrey Levin about how the results of conservation research can be applied in a practical way.

*Climate Controls for Historic Buildings: A New Strategy*

Many museums, libraries, and archives housed in hot and humid regions have sought to reduce the threat posed by biological infestation by controlling relative humidity through the use of air-conditioning systems. But use of these systems can result in other problems. For this reason, the GCI has been conducting research to identify and test alternative systems that are robust, sustainable, and simple to operate.

**Getty Conservation Institute** Conservation, the Getty Conservation Institute Newsletter – Preventive Conservation. (2000) [http://www.getty.edu/conservation/publications/newsletters/15\\_2/](http://www.getty.edu/conservation/publications/newsletters/15_2/)

Includes the following articles:

*Managing the Environment: An Update on Preventive Conservation*

Recognition of the importance of preventive conservation is growing in virtually every region of the globe. Defined as the management of the environmental conditions under which collections are housed and used, preventive conservation has advanced in both research and application. The older model of conservation—in which the conservator is perceived as the primary, if not the sole, guardian of a collection—is gradually being replaced by long-term preventive conservation strategies in which conservators share responsibility with others.

*Preventive Conservation: A Discussion*

Catherine Antomarchi of the International Center for the Study of the Preservation and Restoration of Cultural Property in Rome, Colin Pearson of the Cultural Heritage Research Center at the University of Canberra in Australia, and Luiz Souza of the Centro de Conservação e Restauração de Bens Culturais Móveis in Brazil, sat down with the GCI's Kathleen Dardes and Jeffrey Levin to discuss efforts to promote preventive conservation.

### *Values and Heritage Conservation*

Sites, objects, and buildings acquire significance as cultural heritage because of the values ascribed to them—be they historical, aesthetic, social, or others. To ensure that conservation initiatives consider social as well as physical conditions, values need to be analyzed through a participatory process that promotes sustainable conservation by engaging communities in the preservation of their own heritage.

**Hankey, Donald.** Management of the historic environment: the broad nature of the process.

*Conservation of historic buildings and their contents: addressing the conflicts.* Watt, David; Colston, Belinda, Donhead Publishing Ltd., Shaftesbury (2003), pp. 97–113.

The process of managing the conservation of the historic environment applies to artifacts as well as to their context, and the lessons learned are common to all scales of conservation challenge. Indeed, the ethical nature of the process requires the building of consensus among all stakeholders involved. This can only be achieved by promoting the best scientific, social, and cultural understanding. The author examines how conservation can be sustainable only if all threats and weaknesses have been accounted for. While the body of scientific knowledge and technology has greatly increased, social, economic, and cultural factors remain a necessary and integral part of the equation for achieving sustainability and the support of stakeholders. This essay tries to set the scientific and technical challenges into the context of the management process. In an age of increasing educational and professional specialization, there is a danger that policy and practice may suffer as a result of myopic perspectives and the lack of a common language to define the values and significance that must be defended. Sustainable solutions essentially involve multisectoral interests. The author examines the common nature of the management processes that must be followed by all participants in any conservation project. (Author's abstract).

**Hankey, Donald.** Movable: immovable: a historic distinction and its consequences. *Conservation of historic buildings and their contents: addressing the conflicts.* Watt, David; Colston, Belinda, Donhead Publishing Ltd., Shaftesbury (2003), pp. 14–27.

The challenge to preserve both a historic building and its contents is but one example of the need to overcome traditional distinctions between immovable and movable property conservation. Nevertheless, historically they have been considered different fields of specialization, each with its own educational programs, practitioners, and professional organizations. This essay reviews the movable: immovable distinction in the light of the origins of the international organizations ICCROM (International Centre for the Study of the Preservation and Restoration of Cultural Property), International Council of Museums (ICOM), International Council on Monuments and Sites (ICOMOS), and International Institute for the Conservation of Historic and Artistic Works (IIC). It advocates greater integration of the two fields in conservation policies. (Author's abstract)

**Hutchings, Jeremy; Cassar, May.** A Soft System Framework for the Conservation Management of Material Cultural Heritage. *Systemic Practice and Action Research* 19, 2 (2006), pp. 201–216.

Experience gained from cultural heritage management in Norway and the UK has led to the development of a framework describing the key conservation activities required to sustain a diverse range between material cultural heritage assets. A soft system approach allows the complex interaction between various activities and external factors impacting on cultural heritage management to be examined as a single entity, for example, the contributions made by human interaction, environmental impact and the properties of the material heritage itself, on the preservation or loss of a cultural object. By constructing such a framework it is possible to identify potential indicators that can be used to measure the quality of conservation activities. Arguments are presented for grouping these indicators of impact into social, economic and environmental categories and examples are given of how this approach can be universally applied to real situations. (Authors' abstract)

**Lloyd, Helen; Staniforth, Sarah.** Preventive conservation and "A madness to gaze at trifles": A sustainable future for historic houses. In *Tradition and innovation: Advances in conservation: contributions to the Melbourne Congress, 10–14 October 2000*. Roy, Ashok; Smith, Perry, eds. International Institute for Conservation of Historic and Artistic Works, London (2000), pp. 118–123.

Museum standards for preserving cultural material need to be interpreted sensitively if they are to ensure sustainable access to fragile historic house interiors presented as homes still in occupation. High standards of preventive conservation can be achieved by adapting traditional housekeeping practices, recorded in 18th- and 19th-century manuals. Conservators have revived methods to protect collections from physical damage, biological infestations, pollution, light, and inappropriate levels of temperature and relative humidity. To ensure that vulnerable collections are properly maintained, conservators equip historic house managers with an understanding of preventive conservation and technical information to aid monitoring and documentation, staff training, and management. In conclusion, the authors emphasize the need to establish a sustainable balance between conservation and access. (AATA)

**Staniforth, S.; Ballard, W. M.; Caner-Saltik, E. N.; Drewello, R.; Eckmann, I.-L.; Krumbein, W. E.; Padfield, T. and et al.** Group report: what are appropriate strategies to evaluate change and to sustain cultural heritage? In *Durability and change: The science, responsibility, and cost of sustaining cultural heritage, December 6–11, 1992*. Krumbein, W. E.; Brimblecombe, P., ed. John Wiley & Sons Inc., Hoboken, New Jersey (1994), pp. 217–224.

**Staniforth, Sarah; Lithgow, Katy.** When conservator meets architect and engineer. In *Conservation of historic buildings and their contents: Addressing the conflicts*. Watt, David; Colston, Belinda, eds. Donhead Publishing Ltd., Shaftesbury (2003), pp. 66–79.

Environmental monitoring in historic buildings has shown that the summer climate of the United Kingdom is usually benign for the collections housed within them. Solar gain is sufficient to reduce the naturally high relative humidity of our maritime climate below the level at which damp-related problems are triggered. Internally, however, comfortable heating levels for human occupants can produce relative humidity levels that are disastrously low or dangerously fluctuating, not only for collections but also for fixtures and the building structure. Conversely, unheated buildings suffer from mold, rot, insect attack, and metal corrosion. The National Trust creates constant humidity at levels below the threshold for mold growth (65%) by installing conservation heating systems controlled by humidistats. To ensure a holistic approach to preventive conservation, other services are often upgraded when conservation heating systems are installed, along with maintenance of the building fabric. The associated building work threatens collections and historic interiors through physical damage, dust, and theft. These risks are controlled through planning by a multidisciplinary team underpinned by good project management. Planning minimizes physical disruption, and programming ensures sufficient time for storage and protection as well as installing and commissioning new systems. Risks are controlled by specifying working methods, providing storage, designing protection, and employing specialist staff to ensure that these measures are implemented. (AATA)

**Taylor, Thomas H. Jr.** Foundations for sound decisions: communications between architectural and collections conservators. *AIC news* 23, 6 (1998), pp. 1, 4–5.

Discusses the need to implement the principles of the New Orleans Charter for the Joint Preservation of Historic Structures and Artifacts, especially to resolve preservation issues in museums in historic buildings. The charter, a product of symposia organized by the American Institute for Conservation (AIC) and the Association for Preservation Technology (APT), is reprinted in the article. Its objective is to encourage collaboration between architectural conservators and collections conservators for the mutual benefit of historic buildings and the artifacts housed in them. Preservation professionals who use the charter have found it useful for garnering the support of museum trustees and administrators in ensuring that specialized conservation professionals are present when the needs of collections and historic structures are addressed. The charter has been put to use effectively at the Colonial Williamsburg Foundation to guide management practices. Future APT/AIC symposia will focus on specific applications of the charter to issues such as lighting. (B.Fr.)

**Watt, David; Colston, Belinda** *Conservation of historic buildings and their contents: addressing the conflicts* Donhead Publishing Ltd., Shaftesbury. (2003)

The eight papers and discussion sessions of a conference entitled 'Where Conservation Meets Conservation': The Interface between Historic Buildings and their Contents, held at De Montfort University on 9 September 2002, form the basis of these published proceedings. The papers, in themselves, provide important commentary on the development and practice of conservation, both of historic buildings and their contents. Taken together, the value that comes from the shared knowledge and experience of the authors is immeasurable. (Authors' preface)