

2010

# Historic House Collections: Drawing up a Collections Management Plan *Guidance notes*



ENGLISH HERITAGE

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## Introduction

This guidance is essential reading for owners of historic house collections and anyone else responsible for looking after works of art, antiques and other artefacts in a home setting. It is intended to help plan both day-to-day and long-term care of furnishings and contents to ensure that they are preserved for the future.

A Collections Management Plan (CMP) is a working document that guides the long-term care of a collection of artefacts. This note focuses on collections of fine art objects, furnishings and other items in historic houses rather than display objects and study collections in museum environments.

In preparing this guidance, English Heritage has drawn on experience gained from managing collections on our own estate and from the advisory work we do for HM Revenue & Customs on certain private collections eligible for conditional exemption from capital taxation. The intention is to provide a short statement of current best practice adapted especially for private owners of collections seeking value-for-money solutions.

The degree and detail of forward planning and the need for professional advice will need to be proportionate. In some cases, the scale and variety of the collection and the nature and use of the house may allow a relatively short statement to suffice. It may be that existing management practices are adequate and need only to be written down, gathered together and codified. The approach and method in this guidance should be relevant in all cases.

All artefacts deteriorate over time but the rate of deterioration will be hastened by the effects of various risk factors. In a domestic setting, there will be a particular range of risk factors depending on the surrounding environmental conditions, the way the objects are used and the potential for damage to them, for example from providing access to the public. The impact of these risk factors may be lessened by practical measures which will slow the rate of decay and reduce the need for repair and remedial conservation treatment in the long run. In other words, the causes of damage and deterioration are addressed rather than waiting for the symptoms to emerge. As a general rule, therefore, a *preventive* approach is preferred to an *interventive* one.

A CMP brings together a record of the collection, analyses the risk factors present and sets out a management system tailored to the collection, the building in which it is housed and the resources available. It provides a prioritised action plan for preventive measures and indicates, if necessary, a programme of conservation treatment for items whose condition is poor or unstable.

There are several advantages to drawing up a CMP. It helps to secure the preservation of a collection in a practical and cost-effective way. Many preventive measures are inexpensive or cost-neutral and may save unnecessary expense on future interventive treatment. A CMP may also enable insurance premiums to be reduced by demonstrating actions taken to reduce the potential for loss or damage. A CMP might also help meet the requirements of conditional exemption from inheritance tax (see below, page 8). Finally, a CMP may help mitigate the impacts of opening a property to the public as a visitor attraction or hospitality venue.



Many historic houses are home to collections of works of art, antiques and other artefacts. Approaches to management will need to take account of the particular factors inherent in the domestic setting.

A Collections Management Plan will contain the following elements:

- a) An inventory of all the objects to be covered by the plan, providing a full description of each item, its location and any information relevant to its care, such as details of its condition and treatments carried out.
- b) A Collections Care Plan, consisting of:
  - Risk assessment focused on light, humidity, dust/dirt/ use, pests, display and storage methods and disaster preparedness;
  - Condition survey;
  - Action plan of tasks in priority order with an indication of responsibility, timing and cost.
- c) A summary of public access arrangements, if the collection is or will be open to the public, covering practical arrangements, interpretation and advertising.
- d) If the collection is developing, a statement noting this and making allowance for new acquisitions and disposals in the planning process.

## Inventory

A complete inventory of the collection is fundamental. It is a working document, holding information which will help manage the collection. It should contain the following information for each object:

- a full and accurate description including a full catalogue entry for any books, with measurements or accepted conventions in size (for example quarto, octavo etc for books); for archives, it may not be practical to provide a listing down to item level and even a file level description may take many years to achieve;
- category or type – it will be useful to be able to sort entries into groups such as paintings, furniture, ceramics, silver etc;
- location;
- current condition, if known;
- a note of any repair or conservation treatment carried out;
- catalogue number; if none have been allocated, it would be sensible to start a simple numbering system, whether or not the objects are to be marked or labelled.

It is only necessary for the inventory to include those objects which are to be covered by the plan. It may be limited to objects belonging to one particular family member or objects in one suite of rooms. If needs change, the format should allow objects to be added.

Many collections will already have been catalogued for their art-historical or antiquarian interest. Others may have been assessed recently, for example for an insurance or tax valuation. It may be necessary to unite a number of such lists to create a consolidated

version and then fill in any gaps. Some information in existing lists may not be relevant for the CMP inventory, such as indications of monetary value and details of artist or maker, provenance and art-historical significance as such details may imply commercial value. Some owners may prefer to maintain a separate record of these details and exclude them from the inventory in use for collections management.

Where an adequate inventory does not exist, it will be necessary to gather the relevant information by observation and research. This work might be done by the owner or house staff. Alternatively, it may be appropriate to commission a freelance curator to catalogue the collection or to supply specialist input after preliminary work has been done in-house. Advice on cataloguing, numbering and labelling can be found on the Collections Trust's *Collections Link* website; advice on commissioning specialist input may be sought from the Historic Houses Association whilst the Museums Association publishes a directory of consultants (for all of these, see *Further reading and contacts*, page 11). It is important that any freelance work is signed off or confirmed by the owner or house staff.

Use of electronic formats is likely to be central. There are a number of software packages available which are suitable for producing inventories. Such databases are powerful tools designed to handle large amounts of information. A survey of these can be found on the Collections Trust website with an indication of costs. There are also some packages which are freely available as open-source software. As an alternative, the illustration on page 4 offers a template that can be created on generally available spreadsheet or database software, or in any word processing software that includes a table-drawing facility



**Light** Faded and damaged books

Light will both bleach and stiffen leather and cloth bindings. Heat from direct sunlight will also speed up the deterioration of leather and paper. These books have suffered damage due to sunlight from a west facing window. The fitting of ultraviolet-absorbing window film and the use of roller blinds will help reduce the light levels. The blind visible here may have been fitted after the damage was caused or may not have been regularly drawn.

### Sample inventory template

Owners identification number (if any)	Room/location	Category	Description	Dimensions (HxWxD cms)	Condition	Conservation treatment or repair	Cross-reference	Photograph
P.I	Hall	Paintings	Portrait of James I, bust length, in white doublet with lace collar and a black hat, on panel	82 x 62	Good	Conserved 2009 treatment report filed	1925 inventory, p12 item 2; 1999 valuation, item 52	See photo file, pictures PI
EC&G3a	Dining Room	European ceramics and Glass	A Dutch Delft vase (one of a pair EC&G3.b), circa 1750-70, decorated with polychrome animals.	30 x 20 x 15	Very good (2003 John Smith)		1999 valuation, item 127	No (planned in year 1)
DRF5	Dressing Room	Furniture	An Edwardian mahogany dressing table, circa 1908, with oval bevelled mirror and turned supports, the bow-front with two drawers, on square tapering legs.	125 x 95 x 50	Poor (2003 John Smith)		1925 inventory, p38 item 4	See photo file, Furniture DRF5

### Notes

This inventory was compiled in August 2008 by Walter Vambrace from the 1925 Inventory of the contents of Salterton Hall and the 1999 valuation prepared by Jenkins & Sons auctioneers. Further input on the ceramics was supplied by Sarah Franklin.

The inventory is maintained by John Walker and was last updated on 10 November 2010.

### Key to condition:

- Very good – no signs of damage
- Good – slight signs of damage
- Poor – significant damage
- Very poor – severe damage, active deterioration

The names and examples above are fictitious and are presented here purely for illustrative purposes.



**Light** Window blinds and chair covers

Window blinds and fitted chair covers follow a long tradition of practical light protection in the country house. Here the use of double blinds keeps the strong direct sunlight from fading the original curtains and furniture. They also help to limit solar gain (the heating effect of the sun in glazed rooms).

(such as Microsoft Word). Even the simplest electronic format will provide a useful management tool. It may be the case that an existing hardcopy inventory needs to be converted to electronic format. If any of the source material was produced electronically, it will clearly help greatly if the original electronic version can be found and put into the new format. For example, if a collection has been assessed by an auction house recently, it may be that their report can be supplied as a sortable electronic file and the relevant data extracted.

To have a single working inventory in an electronic format will provide considerable advantages. It will enable the location of objects to be logged and new information added. It will enable the data to be organised and presented in a variety of ways. For example, the ability to extract all the entries for books would help plan a NADFAS volunteer book conservation project, whereas a room-by-room version would facilitate a disaster recovery drill or the decanting of a room in advance of repairs.

Regular updating of the inventory is recommended, for example to take account of the long-term transfer of objects from room to room. It is worth recording damage and any repair or conservation treatment undertaken. The entry can provide cross-reference to other relevant documentation. It may be worthwhile setting out a strategy for improvements or additions, for example where inventory entries need to be clarified or expanded or for the phased addition of record photographs. A photographic record of each object will be

of lasting benefit for a variety of reasons. Digital photographs can be attached to electronic inventory entries. For security, however, it may be advisable to keep the photographic record separately but suitably cross-referenced. It is a good idea for someone to be assigned to keep the inventory up to date.

## Collections Care Plan

The other component of a CMP is a Collections Care Plan which defines an appropriate standard of care to ensure that objects are kept in a way conducive to their preservation. As we have seen, a focus on preventive care will minimise deterioration of the collection and promote long-term preservation.

The Collections Care Plan will be based on an assessment of the risk of damage to the objects. There are a number of risk factors that are known to cause damage to artefacts housed in a domestic setting. The key ones are light; humidity; dirt, dust and use; pests; display and storage methods; and lack of disaster preparedness. These are discussed on page 6. More information on these factors and their effect on different types of object can be found on the Icon (Institute of Conservation) and National Trust websites (see *Further reading and contacts*, page 11).

## Assessing the risks and preparing a plan

As the Collections Care Plan section of the CMP relies on specialist expertise, it should be prepared by a collections care conservator with relevant experience of working within the historic house context, ideally someone accredited in Collections Care by the Institute of Conservation (Icon). Whilst there are many practical conservators in the marketplace, it is important to identify a collections care conservator who will be able to suggest pragmatic solutions for collections displayed within the domestic setting.

A suitable consultant conservator accredited in preventive conservation by Icon can be found via the Conservation Register (see page 10). It is important that in commissioning an adviser the owner/manager confirms that the conservator has experience of the care of historic house collections as the approach needs to be more flexible than that taken for a museum-based collection.

A standard brief for the Collections Care Plan is set out on page 9-10. It is essential to make any existing relevant information available to the consultant conservator. It is advisable to gather together the following documents, where they exist, in advance:

- Inventory;
- Floor plans with room names consistent with those used in the inventory;
- Any management plan, condition survey or forward work programme for the building fabric or building services (plumbing, heating and power) especially where major works are envisaged that will disrupt the internal environment;
- Any documents that describe current or past management practices are relevant, such as a housekeeping schedule or day diary, heating timetable etc;
- Records of preventive measures already in place and any programmes of interventive conservation, restoration or repair, past or future;
- Information on fire detection, security and any disaster recovery plan.

These will help the consultant conservator to carry out their risk assessment and will inform any recommendations about collections care.

### **Risk factors for historic house collections**

**Light** will actively fade and weaken the structure of carpets, curtains, upholstery, watercolours, books and furniture within a few years of exposure. Both ultraviolet rays (UV) and visible light cause damage. Moving vulnerable objects away from direct sunlight, installing UV-absorbing window film and using blinds or curtains during bright days are ways of reducing the rate of fading and other damage.

**Humidity** (the amount of moisture in the air) can also affect artefacts. When the air gets very damp (above 65% relative humidity) mould will grow on books, textiles, pictures and furniture, causing staining. By contrast, a very dry environment (below 40% relative humidity) will result in the cracking and distortion of pictures and furniture. Frequent fluctuation between damp and dry conditions speeds up the rate of distortion and cracking. Moving furniture away from heaters or even lowering the room temperature during winter will prevent dangerously dry conditions. Maintenance of the roof, gutters and drainpipes will help prevent damp problems inside.

**Dust, dirt and use**, together with how the collections are cleaned, are closely related risk factors. Normal household dust and dirt will not cause major damage to collections; however, if left on objects for long periods it can become bonded to the surface making it more difficult and expensive to remove. Depending on the methods used, dusting and cleaning can damage the surface of textiles, gilded furniture and even metals, for example. How objects are moved and used, and even how they are protected on public access days, can have an effect on the amount of chips, scratches or breaks that occur.

**Pests** including insects and rodents can cause considerable damage to objects. Clothes moths and woolly bears (the larvae of the carpet beetle) will damage carpets, curtains, upholstery, clothes, books and natural history specimens such as stuffed animals. Furniture beetle can attack wood if conditions are very damp. Thorough cleaning coupled with targeted monitoring using sticky traps will reduce the need for expensive fumigation treatments. Checking and sweeping unused chimneys will prevent insect infestations as birds' nests lodged in chimneys are a primary source of moth. Discarded items such as carpets and cardboard stored in lofts and basement rooms can harbour pests; disposing of them will help prevent moth and rodent attack.

**Display and storage methods** relates to how artefacts are hung, mounted, stored or shown in display cases. Wool baize for example is often used to line display cabinets or a butler's pantry. It releases sulphides that will speed up the tarnishing of silver and copper. Insecure hooks may result in a picture or mirror falling off a wall.

**Lack of appropriate disaster planning** may result in avoidable damage to collections in the event of a flood or fire. Disaster and salvage plans will help to safeguard collections in the event of a fire or flood. Such plans may include a Fire Risk Assessment and may involve setting up an annual visit by the local fire brigade, compiling a list of emergency contact numbers and preparing a salvage plan based on house plans and an inventory. Inadequate physical security measures and intruder detection systems may increase the likelihood of burglary and theft.



**Dust, dirt and light** 'Putting to Bed'

A housekeeping schedule that includes an annual thorough clean and the use of dust covers for rooms that are not used for part of the year can help to prevent damage from dust, dusting and light. The same approach can be used when repair or decoration work is done.

The Collections Care Plan should be based on a site visit to assess the current condition of the objects and the nature of the surroundings in which they are kept. The survey should be based on a suitable sample size: other than for small collections a 2 to 5% sample is likely to be appropriate for an historic house collection. A smaller sample size may well be appropriate for archives. Each category of object (eg furniture, works on paper etc) should be included in the sample to establish which materials are vulnerable. The environment in each room in which objects are kept – or planned to be kept - should be assessed so that room-specific factors (eg aspect, presence of open fireplace etc) can be taken into account. It does not follow, therefore, that the sheer number of objects dictates the time needed for an adequate survey. It should be possible to gain a picture of the key risks to a collection and the required preventive measures during a two day visit, with perhaps three days further for writing up the plan. It is essential that the plan and recommendations are drafted in full consultation with the owner or manager.

The resulting plan for collections care should be realistic, prioritised and costed in order to make the most effective use of available resources. That is, it should consider the urgency and relative impact of the measures recommended, giving weight to actions that tackle major risks rather than minor ones and benefit many objects rather than few. Emphasis should be placed on preventive measures, rather than the expensive interventive or remedial treatment of individual artefacts where damage has already occurred. For example, this might include fitting window blinds and ultra-violet-absorbing window film where light sensitive items are on display; providing one-to-one training to a housekeeper to ensure that cleaning materials and



**Dust, dirt and use** *Heavy wear through frequent use*

The top rail of this fine gilded 19th century chair has lost much of its original gilding through use. It may be worth reserving delicate items for occasional use and choosing more robust pieces for daily use.

**Dust, dirt and use** *Cleaning methods are important*

A careful approach to cleaning objects can prevent damage. Using soft brushes and flicking dust into a vacuum cleaner nozzle is the best method for dusting delicate and valuable objects.



methods are improved to prevent damage occurring to the objects; or introducing an insect pest monitoring programme to identify the source of the insect pests so that treatment can be targeted and the use of toxic insecticides minimised. The intention is to concentrate on minimising the risks that are actively causing damage to the artefacts, thereby reducing the potential repair bill and making most effective use of available resources.

As we have seen, the plan will be based on a sample survey of the objects. The more substantial task of assessing the condition of every object can where necessary be undertaken over a suitable period to inform a remedial treatment programme where necessary, and with appropriate provision for review. For example, where a particular room or category of object is showing a high risk of deterioration, there may be a need to carry out a full survey of the objects concerned. If specific categories of object are affected, it would be advisable for an appropriate specialist conservator, such as for paintings, textiles or furniture, to carry out an assessment. Again, suitable conservators can be selected from the Icon Conservation Register (see page 10) to ensure appropriate professional standards of practice. Conservation treatment should be prioritised according to the degree of instability and the risk of further damage as well as the importance of the object. There may be cases where it is better to prioritise preventive measures benefiting many objects over remedial treatment for a few, particularly if those few objects are in a stable state.

All the actions undertaken as part of the Collections Management Plan should be recorded and any specialist reports and records of measures undertaken kept for future reference.

It is advisable that the consultant conservator should develop a continuing relationship with the owner/manager so that the plan can be adapted to suit changing circumstances and to ensure the efficient and effective delivery of the plan in the same way that an architect would provide periodic advice on building maintenance and oversee any major works.

English Heritage has trialled a version of this survey method on a number of collections in privately-owned houses in the course of assessing and monitoring properties under the conditional exemption scheme operated by HM Revenue & Customs. The concept of preventive care and the benefits of a plan-led approach were welcomed. Owners were keen for timely practical advice. The CMP process should encourage the use of targeted professional advice.



**Humidity** *Flaking gilding*

Gilded furniture is very vulnerable to dry conditions. As the furniture carcass dries out, it shrinks which causes the gilded layers to flake and fall off. The weakened gilding then becomes more vulnerable to damage from use. Veneered furniture suffers in the same way.

## Conditional exemption and CMPs

Exemption from inheritance and capital gains taxes is available for owners of outstanding heritage property subject to undertakings agreed with HM Revenue & Customs (HMRC). Amongst the types of property for which this heritage relief is available are objects outstanding in their own right and objects which are historically associated with an outstanding building. Favourable tax arrangements are also available on similar terms for owners of objects which are historically associated with an outstanding building who vest income-generating assets in maintenance funds set up for the purpose of sustaining outstanding buildings and their associated collections. Further details can be found in the publications listed under *Further reading* below (page 11).

The undertakings laid down will include a requirement on the part of the owner to take reasonable steps to preserve the objects and provide public access to them. For collections associated with outstanding buildings, the statutory requirement specifies maintenance and repair as well. HMRC welcomes expression of these requirements in a CMP, in line with established practice for land and buildings, although a plan will not necessarily be required in every case. The drafting of a plan will normally follow once HMRC has indicated whether the property qualifies for conditional exemption but before the formal agreement is signed with the owner. However, it may be helpful to initiate the preparation of the plan earlier in the process. Either way, HMRC will seek the advice of English Heritage or the relevant devolved administration as appropriate before approving the plan.

In many cases, owners will not be claiming conditional exemption for their entire collection. If a CMP is required for the purposes of conditional exemption, then it will only need to cover those objects within the claim. Owners may nevertheless see a value in extending the scope of the plan to cover other objects which are likely to benefit from the plan-led approach. In such cases, it is advisable to find some means to distinguish the conditionally exempt items from the rest in the inventory. This will be necessary for HMRC and its advisers in their periodic monitoring visits.



### **Humidity** Cracking of furniture

Sustained dry conditions has caused this 18th century commode to crack and warp. It has also been bleached by sunlight. Placing wooden objects in direct sunlight or near a hot radiator will cause this type of damage.



### **Pests** Woolly bears enjoying a feast

This poor seagull from a large natural history collection in a country house has become food for 'woolly bears', the larvae of the carpet beetle, *anthrenus verbasci*.



### **Display and storage methods** Display cases

Enclosing objects in display cases can create a concentration of volatile compounds that can rapidly increase deterioration. Wool baize releases sulphides which will cause silver to tarnish and leather to become brittle. Meanwhile, unpadded costume pieces like the woollen cap in this display case can start to split along crease lines.



The plan will need to be proportionate to the scale and variety of the collection and the building in which it is housed. Where the number and variety of objects to be exempted is small and the owner decides to limit the scope of the plan to them alone, then the resulting plan and recommendations are likely to be relatively short. For example, a small collection of objects of a single type held in one or two rooms, such as a library or armoury collection, is likely to result in a shorter document than a diverse collection of many object types and materials occupying a large suite of rooms. However small the number of objects, it will still usually be the case that all the risk factors will need to be considered. The plan is a working document and will need to evolve to reflect changing circumstances. It will need to provide for periodic review.

The Collections Care Plan may recommend a range of preventive measures and interventive treatments. It is likely that actions will need to be prioritised. When formulating their proposals for claiming exemption (and subsequently during the currency of any such designation), owners are advised to consider which will be necessary to fulfil the statutory requirements to preserve, maintain and repair and ensure that these actions are indicated as such in the plan.

Some conditional exemption claims for collections will be part of wider claims for the buildings in which they are housed and the surrounding land. It is likely that management plans will be required for the land and buildings as well, in which case the CMP should form part of this wider Heritage Management Plan (see Natural England's publications NE63 and NE64 detailed under *Further reading*, page 11). It is important to ensure that any management policies or recommendations for the collections are consistent with those for the buildings and vice versa.

## Public Access Arrangements

Opening to the public may be required as a condition of grant and will be where the owner seeks conditional exemption. Many houses are in addition available as hospitality venues for weddings, conferences etc.

The CMP will need to take account of the impact of public access. It is advisable to record the standard opening times, the frequency of hospitality use and the rooms affected. This will be of help to the consultant conservator who prepares the Collections Care Plan. English Heritage has published guidance on running hospitality events in historic houses (see *Further reading*, page 11).

In the case of archives, some owners will prefer to make a long-term loan to a Public Record Office, with suitable steps to preserve the historical association with the relevant building. Where access is to be provided at home, typically for research and study, this must be under suitably invigilated conditions. Further advice on archive and manuscript collections can be provided by the Archives Sector Development department at the National Archives (see *Further reading and contacts*, page 11).

For properties which have not opened before, it is worth considering other aspects such as training for staff, interpretation (guidebook, guided tour etc) and advertising.

## Brief for preparation of a Collections Care Plan

This brief is designed to guide a consultant conservator on the preparation of a Collections Care Plan which will form part of a Collections Management Plan. It may be desirable at the outset to agree the level of input required taking account of the scale and variety of the collection, the nature and use of the house and

the extent to which existing management practices are already documented. This is likely to affect the length of time needed for the site survey and drafting.

A Collections Care Plan aims to define the risk factors that will result in damage to a collection and to identify and prioritise actions that address those risks. It is based on a risk assessment and condition survey of a representative sample of the collection (usually between 2 and 5%).

On arriving at the property the conservator will need to meet the person(s) responsible for the daily operation of the property. This could be the owner, estate manager, housekeeper or other staff member. It is important for the conservator to understand the layout of the house and how the rooms are used beyond normal family activity, including public opening times, corporate hospitality, wedding receptions, guest accommodation, filming and photography.

Potential property-wide risks will also need to be assessed during this initial meeting by briefly reviewing the following:

- Building maintenance regime (gutters/roofs/windows/chimneys) and any planned repairs or alterations;
- Fire prevention measures;
- Flood prevention measures;
- Security system;
- Heating methods;
- Pest control (insects, rodents).



### **Humidity/ Dust, dirt and use/Display and storage methods**

*Paintings on canvas are particularly vulnerable to damp conditions.*

A succession of damp and then dry conditions linked to water ingress has been largely responsible for the buckling of this canvas painting along the bottom edge and sides. The build up of dust and dirt has masked the image and is also contributing to the poor condition of the painting. There is also a risk associated with the display conditions as this large painting is secured to the wall by a single hook which could fail.

The next step is for the conservator to tour the display and store rooms with the owner and/or the housekeeper following the visitor route. This tour should focus on gaining familiarity with the display rooms and collections as well as understanding the current housekeeping regime. The following information should be gathered about:

**The collection**

- Collection categories on display in each room (books, manuscripts, furniture, ceramics, textiles, paintings etc);
- Any specific constraints or considerations for particular objects which may have a bearing on any recommendations (for example, objects which are covered by a conditional exemption agreement or objects of particular value or family significance);

**The room environment**

- Light levels (UV and Lux) and sources;
- Relative humidity and temperature levels (spot readings);
- Room aspect (eg South-facing);
- Heating system;

**Current collections care practices**

- Light control;
- Heating and humidity control;
- Cleaning methods and schedule;
- Insect pest monitoring and rodent control;
- Protection, display and mounting methods;
- Disaster planning.

The next stage is to examine a selection of each collection category and record recent observable damage, noting which risk factor caused the damage. This is best achieved by the conservator visiting each display room again and randomly selecting a suitable sample of the objects in the room ensuring that different materials are represented.

The risk assessment and condition survey should normally take two days on site to complete.

It should then take around three days to draft the Collections Care Plan. This should be drafted and discussed with the owner, ideally during a follow-up visit before an agreed version is produced. Recommended actions should be set out in order of priority and, where they carry a cost implication, a budget estimate given, where possible. Recommendations should be divided into preventive and interventive. It may be useful to identify where other expertise may be needed, for example where an insect pest monitoring programme is required or where conservation treatment for a particular object is urgently needed. An order of priority for a full condition assessment of each category of object can also be identified where appropriate.

A template for a Collections Care Plan appears below:



© Oxfordshire Fire and Rescue Service

**Disaster Planning** Wardington Manor, Oxfordshire 16-17 April 2004  
Quick thinking by the family and local villagers working with the fire brigade saved the fine collection of rare books from a devastating fire. Preparing a disaster plan can prevent loss and damage to collections in the event of a fire or flood.



**Disaster planning** Practice drills  
Involving the local fire service in salvage planning and practice sessions can reduce the risk of damage to collections in the event of disaster.

**Title 'House name/collection name' Collections Care Plan**

**Objective:**  
To identify and prioritise actions that will reduce the risk of damage to the house collections.

**Introduction**

**General Observations** (House-wide)

**Key risks and recommendations -**  
The key risks and recommended mitigation actions are described below in priority order.

**Summary**

**Contacts & Suppliers**

**Action Plan** A table listing tasks in priority order with an indication of responsibility, timing and cost.

**Using the Conservation Register**

The Conservation Register provides information on accredited conservator-restorers in the UK and Ireland (denoted by ACR after their name). The Conservation Register can be viewed on the internet at [www.conservationregister.com](http://www.conservationregister.com). You can search for accredited conservators by specialism and geographical coverage. The register includes a category for conservators specialising in preventive conservation who will be able to prepare a Collections Care Plan for a historic house. Enquiries about the register can also be made by 'phone on 020 7785 3804.



**Light** Sunshine falling on fabrics and paintings will cause fading to textile dyes and pigments and the darkening of picture varnishes.

## Further reading and contacts

*The National Trust Manual of Housekeeping: The Care of Collections in Historic Houses Open to the Public*, National Trust/Elsevier, 2006 (revised edition forthcoming in 2011)

*Looking after Antiques*, Anna Plowden and Frances Halahan, National Trust, 2003

*Capital taxation and historically associated objects – Guidance note*, English Heritage and the Historic Houses Association, August 2004, available as a download from: <http://www.english-heritage.org.uk/publications/>

*Preparing a Heritage Management Plan*, Natural England, 2008 available as a download at: <http://naturalengland.etraderstores.com/NaturalEnglandShop/NE63>

*Conditional exemption and Heritage Management Plans*, Natural England, 2008, available as a download at: <http://naturalengland.etraderstores.com/NaturalEnglandShop/NE64>

*Informed Conservation, understanding historic buildings and their landscapes for conservation*, Kate Clark, English Heritage, 2001. A summary may be found in the Guidance Library at <http://www.helm.org.uk>

*Conservation management planning*, Heritage Lottery Fund, 2008, available as a download at: <http://www.hlf.org.uk>

*Environmental Management Performance Standards; Guidelines for Historic Buildings*, English Heritage (product code 51489, available free from English Heritage Customer Services, 0870 333 1181, [customers@english-heritage.org.uk](mailto:customers@english-heritage.org.uk), and as a download from <http://www.english-heritage.org.uk/publications/>)

*Practical Conservation Guidelines for Successful Hospitality Events in Historic Houses*, English Heritage (product code 50976, available free as above)

*A Helpful Guide to Insect Pests found in Historic Houses and Museums*, English Heritage (product code 52010, available free as above)

*English Heritage Guideline for insect pest management in EH historic properties*, Dee Lauder and David Pinniger, English Heritage, 2006 (available free as above)

*Icon Care and Conservation* fact sheets on a range of topics (available from the Icon website, <http://www.conservationregister.com> under Caring for...)

The **National Trust** website, <http://www.nationaltrust.org.uk>, has information on Caring for collections.

The **Collections Trust's Collections Link** website, <http://www.collectionslink.org.uk>, has information and guidance on a range of collections management subjects including documentation, cataloguing, numbering and labelling and collections care.

For the Collections Trust's survey of cataloguing software, see <http://www.collectionstrust.org.uk/>

Collections Trust has sponsored the development of a British Standards Institute code of practice for cultural collections management (known as PAS 197). Further details can be found on the BSI website at <http://www.bsigroup.com>. The method and approach recommended by English Heritage in this guidance would be a starting point for owners wishing to meet the standard set out in the code of practice.

The **Museums Association** maintains an online directory of suppliers which includes freelance curators (<http://www.museumsassociation.org/suppliers>). It also publishes the Museums Services Directory in hardcopy.

The Archives Sector Development department at the **National Archives** provides advice for owners of archive and manuscript collections. They can be contacted at: [asd@nationalarchives.gsi.gov.uk](mailto:asd@nationalarchives.gsi.gov.uk)

Other resources and advice are available from the **Historic Houses Association** (<http://www.hha.org.uk>)

## Authorship

This guidance note was written by Amber Xavier-Rowe, Lisa Davies and Guy Braithwaite

## Acknowledgements

This guidance promotes a realistic and proportionate approach to the essential conservation of historic objects and collections and has been the result of extensive consultation with the following

- historic house owners, through the Historic Houses Association;
- the National Trust;
- Sotheby's;
- Christie's;
- Icon, the Institute of Conservation;
- the Collections Trust;
- Museums Association;
- The National Archives;
- Museums Libraries & Archives Council (England);
- HM Revenue & Customs;
- Historic Scotland;
- Cadw, Welsh Assembly Government;
- CyMAL, Museums Archives and Libraries, Welsh Assembly Government;
- Northern Ireland Environment Agency.

The principles and guidance in this document have been endorsed by the Scottish Government and the Welsh Assembly Government through their respective heritage services, and by the Northern Ireland Environment Agency.

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- maintaining over 400 properties and making them accessible to the broadest possible public audience; and
- maintaining the National Monuments Record as the central publicly accessible archive for the historic environment in England.

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