

## CONSERVATION PROCEDURES

# 7.7 Choosing and Working with a Conservator

**Jan Paris**

Conservator for Special Collections

University of North Carolina at Chapel Hill

**NEDCC Staff**

Andover, MA

### INTRODUCTION

Library, archive, and historical society collections are made up of diverse materials that differ widely in type, size, and format. They are stored under varying environmental conditions, housed in a variety of boxes and enclosures, and used for various purposes both frequently and rarely. The net result is that the materials in our collections range in their condition from pristine to severely deteriorated. Some of these items will require conservation attention, and institutions without a conservator on staff must entrust their valued materials to the care of an individual outside the institution. Choosing a conservator is an important step in providing responsible conservation.

To assist in that process, this publication explores some of the issues and concerns an institution faces when selecting a conservator. What is the nature of conservation? What are the important considerations in looking at the qualifications and background of a conservator? How does one find and work with a conservator—and what should be expected? What are the factors relevant to conservation treatment of special collections materials—that is, those materials that are significant as artifacts because of their age, rarity, beauty, historical or bibliographic importance, research potential, associational, or monetary value? These factors are also relevant for those items whose physical complexity or size make reformatting (either digital or analog) impractical and requires the preservation of the physical artifact. For these materials, even if the item's intrinsic value may not demand conservation, treatment may be the best option.

Certain items in a collection are so significant that they automatically warrant a conservator's attention. Conservation of such items is especially appropriate when the materials cannot withstand use—even careful use—without being

damaged, when they are physically or chemically unstable, or when they have received inappropriate treatment in the past.<sup>[1](#)</sup>

### CONSERVATION AND THE PROFESSIONAL CONSERVATOR

Conservation treatment is the application of techniques and materials to chemically stabilize and physically strengthen items in a collection. The aim of treatment for materials with artifactual value is to assure the item's longevity and continued availability for use, while altering its physical characteristics as little as possible. Conservation also includes making decisions about which items need treatment and determining appropriate treatments.

Conservation treatment of special collections materials requires the judgment and experience of a qualified conservator. A professional conservator is a highly trained individual with broad theoretical and practical knowledge in the following areas:

- the history, science, and aesthetics of the materials and techniques used to produce the items in our collections
- the causes of deterioration or damage to these items
- the range of methods and materials that can be used in conservation treatment
- the implications of any proposed treatment

Over the last 40 years, the field of conservation has undergone a period of rapid growth and increasing specialization, especially in the areas of library and archives conservation. Over the past two decades, the field has transitioned to a formal educational accreditation system and a professional certification process. Because of this, institutions can use online tools and directories to identify conservators who are qualified to provide the necessary treatment services.

A conservator should demonstrate—in every aspect of his or her work—a commitment to high standards of practice and an alignment with the AIC Code of Ethics.<sup>[2](#)</sup>

When evaluating prospective conservators, consider the individual's conservation training, the length and extent of their practical experience, and their professional affiliations. In addition, don't hesitate to contact client and peer references to ensure that you are making the best and most informed choice.

## **Conservator Training**

Competent conservators are trained in one of two ways: through completion of an academic graduate program that leads to a master's degree or through a lengthy apprenticeship. Graduate training programs in North America offer two to three years of academic course work covering the history and science of art and historic artifacts, the cultural context of their production, and conservation treatment practices. A final year is spent obtaining intensive practical experience under the direction of a respected conservator in an established conservation laboratory. Graduates then often undertake an additional year of advanced internship or pursue further study or research opportunities through existing fellowship programs.

Alternatively, some individuals choose not to attend a graduate training program. This might be because of the program's cost, because its focus does not match their own interests, or for any number of other reasons. Training through apprenticeship offers a valid alternative. The success of any apprenticeship program relies on the resourcefulness of the individual to obtain broad theoretical and practical knowledge through sustained internships in respected conservation laboratories; attendance at workshops, seminars, and specialized academic courses; and independent reading and study. Apprenticeship training is especially common in—and can provide very good preparation for—book conservation, a field in which formal academic training opportunities are limited. Apprenticeship training strategies differ considerably from one another and may vary in quality. Therefore, it is important to evaluate each individual's training carefully.

A trained bookbinder is not necessarily a book conservator. While he or she may possess many of the necessary manual skills, a bookbinder may not have the broader knowledge required to evaluate, propose, and carry out the most appropriate treatment from a conservation standpoint. Similarly, professional framing studios may include "paper restoration" in their list of services, but framers may not have the knowledge required to make conservation decisions.

Regardless of their educational training, all conservators specialize in treatment of particular types of materials and can provide only general advice about storage, housing, or maintenance of other materials. For example, a responsible book conservator will not provide technical consultation or treatment for works of art or furniture since they are outside the realm of their expertise.

## **Professional Organizations for Conservators**

Membership and active involvement in the field's professional organizations is a good indicator of a conservator's interest in keeping abreast of technical and scientific developments, in exchanging information, and in strengthening professional contacts. Many professional conservators belong to organizations such as the American Institute for Conservation of Historic and Artistic Works (AIC), the International Institute for

Conservation (IIC), and regional conservation organizations. While not a guarantee of a conservator's knowledge, competence, or ethics, membership in a professional organization is a sign of professional involvement, without which it is almost impossible to keep up with developments in the field.

Categories of membership may also provide some indication of the conservator's experience. In particular, "Fellow" or "Professional Associate" membership in AIC is conferred after a specified number of years in the field and is based on a peer-review process. These membership categories indicate that the conservator has agreed to abide by the [\*Code of Ethics and Guidelines for Practice of the American Institute for Conservation of Historic and Artistic Works\*](#), a document that "sets forth the principles that guide conservation professionals and others who are involved in the care of cultural property."

## **HOW TO FIND A CONSERVATOR**

Finding a qualified conservator may require persistence, since conservation expertise (especially in book conservation) is not equally available in all areas of the country. In addition, many conservators do not advertise. If you are located in an area of the country with few conservators, do not hesitate to obtain referrals from a broad geographic area. Many conservators are accustomed to dealing with clients located at a great distance and can offer guidance for safely packing and transporting fragile materials to their laboratories. They should also be able to provide you with information about shipping or courier services that can provide insurance, special handling, and security for valuable materials during transit.

Begin by developing a list of potential conservators. Contact conservation departments in nearby libraries, museums, and archives. Staff at these institutions can be a good source of general information and advice. They may be able to recommend conservators in private practice in the nearby area or regional centers that offer treatment and broader preservation services. In some cases, conservators employed by an institution may accept private work outside of their institutional commitments.

In addition, contact people who work in the special collections departments of libraries, state archives, large historical societies, and major museums to obtain the names of conservators who have worked for them on a regular basis. In all cases, find out whether a recommendation is based on their direct experience with the conservator or on secondary information.

The American Institute for Conservation is another good source for referrals. The AIC's Find A Conservator tool<sup>3</sup> is an online database that can be searched for the names of professionals who practice in your area and who specialize in the treatment of particular types of artifacts. AIC does not endorse individual conservators or vouch for the quality of their work, but the Find

A Conservator database lists only Professional Associate and Fellow members and offers general information about what a consumer of conservation services should expect from a conservator.

These contacts should provide the names of several potential conservators. However, these referrals are not necessarily an indicator of quality. Comparison shopping is always a sound principle, even when seeking conservation services. A series of informed questions (outlined in the following sections) will provide a framework for evaluating a conservator's capabilities.

You may also find that some of the conservators on your list are not able to provide the kind of treatment you require because the particular problem lies outside their expertise or because they are unable to accommodate your artifacts in their lab. Others may have a large backlog of work and may not be able to treat your item as quickly as you would like.

Conservation treatment may require materials to be out of your institution for relatively long periods of time—several months at a time is not atypical. Treatment can also be expensive, but the cost of a competent conservator is a small price to pay when compared to the risk that an artifact may be irreparably damaged or even lost through inadequate or inappropriate treatment.

If a collection survey will help you evaluate your overall conservation needs, consider retaining a conservation consultant. A collection survey is designed to assess the overall conditions of a collection and the environment in which it is housed. The survey results in written recommendations that can help an institution develop a long-range plan for the care of its collections. Such recommendations might include suggestions for environmental improvements, procedural changes, staff education, re-housing projects, and the conservation treatment of selected materials. This approach is especially useful for institutions that do not have adequate in-house expertise or experience in assessing conservation needs. The referral strategy outlined above will help you identify individuals who are qualified to do a conservation survey.

## **CONTACTING A CONSERVATOR**

### ***What the Conservator Will Ask You***

When you have obtained the name of a conservator, arrange a time and location to discuss your conservation needs. Some conservators will come to an institution, while others will request that you bring the item to them. If you are located at a distance, arrangements should be made for shipping the item for examination, after preliminary discussion by telephone or email.

To ensure that your collections receive appropriate treatment, it is essential to develop a collaborative working relationship with a conservator from the beginning so that treatment decisions reflect a balance between curatorial and conservation priorities.

To facilitate this interaction at the outset, be prepared to provide the conservator with the following:

- the nature of the item (e.g., book, manuscript, art on paper)
- the component materials (e.g., paper, leather, parchment)
- the media (e.g., writing, typing, printing ink)
- the nature of the problem (e.g., tears, physical distortion, brittleness, a combination of factors)
- the type and extent of anticipated use (e.g., extensive or limited research use, exhibition)
- environmental conditions (e.g., winter heating only, stable conditions with temperature and humidity control)
- housing systems (e.g., upright or flat shelving, boxes or other protective enclosures)
- the desired outcome of treatment (e.g., basic stabilization or protection, improved appearance, prevention of loss of information)

This information is critical for the conservator to judge whether or not he or she can work on the item. It is also important if the conservator is to develop a treatment proposal that adequately addresses both the condition of the item and your institutional requirements.

Make sure to determine in advance if there are any deadlines that must be met. Finally, have a definite idea of the amount of money available, as this may dictate the level of treatment you can afford. Valuable time and effort will be saved if you are clear with the conservator about these matters from the start.

At this point, a conservator may make general suggestions about different treatment approaches and techniques that might be suitable for your items. However, do not expect the conservator to offer concrete treatment proposals or specific cost estimates until he or she has had a chance to examine the items fully.

### ***What You Should Ask the Conservator***

From the beginning, ask questions that will help you evaluate a conservator's qualifications and ability to treat the items in your collection. Thinking about the information already covered concerning the education, training, and professional development of conservators, your questions should address:

- training
- length and scope of practice, including area of specialization
- membership in professional organizations
- whether a portfolio of work or treatment reports is available
- references

Determine how the conservator estimates costs (by the hour, day, or project), and whether or not the cost estimate is binding if treatment requires more or less time than has been projected. Ask if there are separate fees for the preliminary examination and estimate—a time-consuming but vital part of conservation treatment. It is not unusual for a conservator to charge an hourly rate, with a flat fee for the preliminary examination, which is payable whether or not the client decides to proceed

with treatment. Make sure you clarify any questions about fees for insurance, shipping, or other separate charges that may be part of the final bill. Costs will vary from one area of the country to another and may also depend upon the nature of a particular conservator's practice specialty.

Contact the conservator's references and, if possible, speak to someone who worked directly with the conservator. Ask each reference if the treatment was completed satisfactorily, in accordance with the signed agreement, and on time. Inquire about the adequacy of photographic and written documentation (see "Course of Treatment" below). Ask if the conservator maintained communication as necessary during treatment—whether, for example, unexpected developments and proposed changes in treatment were adequately discussed. Remember that different clients contract for treatment services for different reasons, and therefore may have different standards or criteria for judging the work that was done. Also bear in mind that a client may not always be able to determine if a treatment is technically flawed, especially when the client must base that evaluation simply on appearance.

Evaluate all the information that you receive from former or current clients as well as from the conservator. Listen carefully to what the conservator says and to the kinds of questions that he or she asks. For example, did he or she ask about the kind and level of anticipated use or about the environment in which the item will be stored? These and other questions may reveal the way the conservator thinks about the broader issues and implications of conservation treatment.

## THE COURSE OF TREATMENT: WHAT TO EXPECT

### *Preliminary Examination and Treatment Proposal*

Once you have chosen a conservator and have established that they are available to work with you, you should expect to interact at several different points. Although the conservator may have provided preliminary recommendations in the initial contact, more detailed examination must now take place. The item should be delivered to the conservator, who will examine it and prepare a written condition report describing these features:

- materials, structure, and method of fabrication of the item
- location and extent of physical damage, chemical deterioration, or previous repairs

Along with this report, the conservator should prepare a treatment proposal containing these elements:

- where appropriate, different options for correcting the conservation problems
- for each option, an outline of the procedures to be used and a description of the condition(s) they are intended to correct
- an estimate of the time required to complete the treatment
- an estimate of the cost

The proposal should clearly reflect the conservator's intention to retain the original character of the item to the greatest extent possible. All proposed procedures should be designed to allow, insofar as possible, subsequent removal of materials added during treatment. When more than one treatment option is included in the proposal, the conservator should explain the benefits and implications of each.

Read the treatment proposal carefully, and do not hesitate to ask questions if you need clarification on its technical aspects. Consider suggestions that the conservator may offer for a less involved treatment than you originally envisioned. For example, when proposing treatment for a book with an early original binding that has become weak but is still serviceable, a conservator may recommend that the book be minimally stabilized and placed in a box rather than treated with more elaborate procedures. This recommendation may be based on the desire to retain intact as much of the original binding as possible. Boxing is especially appropriate if a volume receives limited use.

Once you agree to a specific proposed treatment, the conservator will ask you to sign the proposal and return it before any treatment begins. During the course of treatment, the conservator may discover that, for a variety of reasons, the proposed treatment must be changed. In that event, they should contact you to discuss the revision.

### *Treatment Report and Evaluation*

After the treatment is complete, the conservator should prepare and submit a final report to you. Treatment reports vary in format and length, but all reports should include descriptions of the following:

- techniques used during the course of treatment
- exact materials used in correcting conservation problems
- photographs documenting the condition before and after treatment, if appropriate
- photographs or diagrams necessary to clarify procedures that were used

The conservator may also make recommendations for special handling or use of the item, when this information is essential to its continued maintenance.

It is important that an institution retain treatment reports permanently. In some cases, the documentation may be useful to researchers who study the physical artifact or may be needed by a conservator doing additional treatment on the item in the future. The report may be kept with the item itself (perhaps housed with it) or it should be easily accessible with other records concerning items in the collection.

When reviewing completed work, keep in mind that it is difficult to evaluate technical aspects of a treatment. A good guideline is that all repairs should be discernable to a trained eye, so that those consulting the materials in the future will not be misled about an item's condition or the nature and extent of previous

conservation treatment. Repairs should, however, be visually integrated so that the eye is not immediately drawn to them, and they should not clash aesthetically or historically with the item. Remember that the nature and severity of damage or deterioration will influence the degree to which the item can be stabilized, strengthened, and aesthetically improved through treatment.

## CONCLUSION

Selecting a conservator is a serious undertaking, but, with reasonable care and diligence, it can be accomplished by the

staff of any institution. It is important to exercise caution and not rashly entrust cultural resources to a person whose judgment and skills are not commensurate with the task.

By asking careful questions, contacting references, and by communicating and working with the conservator before and during treatment, you will be able to obtain competent conservation services. In this way, the sometimes delicate chain linking the past and the future will not be broken, and these important resources will remain available to researchers at your institution into the future.

## ACKNOWLEDGMENTS

The original version of *Choosing and Working with a Conservator* was originally published by SOLINET in 1990.

## NOTES

1. Some examples of inappropriate treatments include the use of poorly designed and acidic pamphlet binders that cause damage and discoloration to the leaves of the pamphlet, and the use of pressure-sensitive tapes that become yellow or brittle, cause bleeding of inks, or leave a damaging and disfiguring adhesive residue on the paper.
2. [Code of Ethics and Guidelines for Practice of the American Institute for Conservation of Historic and Artistic Works](#).
3. The AIC Guide to Conservation Services can be accessed through [Find a Conservator](#) on AIC's Web site.

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## SELECTED BIBLIOGRAPHY

American Institute for Conservation. [Code of Ethics and Guidelines for Practice of the American Institute for Conservation of Historic and Artistic Works](#), Washington, D.C.: AIC, revised 1994.

American Institute for Conservation. [Defining the Conservator: Essential Competencies](#), Washington, D.C.: AIC, 2003.

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American Institute for Conservation. [Position Paper on Conservation and Preservation in Collecting Institutions](#), 2002.

Stewart, Eleanor. "Special Collections Conservation." In *Preservation: Issues and Planning*. Paul Banks and Roberta Pilette, eds. Chicago: American Library Association, 2000, 285–306.

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## INFORMATION RESOURCES

### The American Institute for Conservation of Historic and Artistic Works (AIC)

727 15th Street NW, Ste. 500  
Washington, DC 20005  
Telephone: (202) 452-9545  
Fax: (202) 452-9328  
E-mail: [info@conservation-us.org](mailto:info@conservation-us.org)  
<http://www.conservation-us.org/>

### Canadian Association of Professional Conservators (CAPC/ACRP)

c/o Canadian Museums Association  
280 Metcalfe Street, Suite 400  
Ottawa, Ontario K2P 1R7

Canada

<http://capc-acrp.ca/index.asp>

### Institute of Museum and Library Services (IMLS)

955 L'Enfant Plaza North, SW, Suite 4000  
Washington, D.C. 20024  
Telephone: (202) 653-IMLS  
Fax: (202) 653-4600  
E-mail: [imlsinfo@imls.gov](mailto:imlsinfo@imls.gov)  
<http://www.imls.gov>

### The International Institute for Conservation of Historic and Artistic Works (IIC)

3 Birdcage Walk  
Westminster  
London, SW1H 9JJ

UK  
Telephone: +44 (0) 20 7839 5975  
Fax: +44 (0) 20 7976 1564  
E-mail: [iic@iiconservation.org](mailto:iic@iiconservation.org)  
<http://www.iiconservation.org/>

**NEDCC Northeast Document Conservation Center**  
100 Brickstone Square  
Andover, MA 01810-1494  
Telephone: (978) 470-1010  
Fax: (978) 475-6021  
Email: [info@nedcc.org](mailto:info@nedcc.org)  
<http://www.nedcc.org>

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## CONSERVATION TRAINING PROGRAMS

**Buffalo State – The State University of New York  
Art Conservation Department**  
230 Rockwell Hall  
1300 Elmwood Avenue  
Buffalo, NY 14222  
Telephone: (716) 878-5025  
Fax: (716) 878-5039  
E-mail: [artcon@buffalostate.edu](mailto:artcon@buffalostate.edu)  
<http://artconservation.buffalostate.edu/>

**New York University  
Institute of Fine Arts  
The Conservation Center  
The Stephen Chan House**  
14 East 78th Street  
New York, NY 10075  
Telephone: (212) 992-5848  
Fax: (212) 992-5851  
E-mail: [conservation.program@nyu.edu](mailto:conservation.program@nyu.edu)  
<http://www.nyu.edu/gsas/dept/fineart/>

**Queens University  
Art Centre Extension**  
15 Bader Lane  
Queen's University

Kingston, Ontario Canada K7L 3N6  
Telephone: (613) 533-2742  
Fax: (613) 533-6889  
E-mail: [artcon@queensu.ca](mailto:artcon@queensu.ca)  
<https://www.queensu.ca/art/art-conservation>

**Straus Center for Conservation and Technical Studies  
Harvard University Art Museums**  
32 Quincy Street  
Cambridge, MA 02138  
Telephone: (617) 495-9400  
Email: [am\\_straus@harvard.edu](mailto:am_straus@harvard.edu)  
<https://www.harvardartmuseums.org/teaching-and-research/research-centers/straus-center-for-conservation-and-technical-studies>

**University of Delaware  
Winterthur Art Conservation Program**  
303 Old College  
University of Delaware  
Newark, DE 19716-2515  
Telephone: (302) 831-3489  
Fax: (302) 831-4330  
E-mail: [art-conservation@udel.edu](mailto:art-conservation@udel.edu)  
<http://www.artcons.udel.edu/>

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## REGIONAL CONSERVATION CENTERS

**Balboa Art Conservation Center**  
1649 El Prado  
San Diego, CA 92101  
Telephone: (619) 236-9702  
E-mail: [info@bacc.org](mailto:info@bacc.org)  
<http://www.bacc.org>  
*Services: Conservation of Paintings, Paper, Photography, Frames, Polychromed Sculpture, Analytical, Surveys*

**Conservation Center for Art and Historic Artifacts**  
264 South 23rd Street  
Philadelphia, PA 19103  
Telephone: (215) 545-0613  
Fax: (215) 735-9313  
E-mail: [ccaha@ccaha.org](mailto:ccaha@ccaha.org)  
<http://www.ccaha.org>

*Services: Conservation of Books, Paper, Parchment, Photographs, Surveys*

**The Gerald R. Ford Conservation Center  
History Nebraska**  
1326 South 32nd Street  
Omaha, NE 68105  
Telephone: (402) 595-1180  
Fax: (402) 595-1178  
E-mail: [hn.fordcenter@nebraska.gov](mailto:hn.fordcenter@nebraska.gov)  
<https://history.nebraska.gov/conservation-center>  
*Services: Conservation of Objects, Paintings, Paper, Photographs, Frames, Sculpture*

**Intermuseum Conservation Association**  
2915 Detroit Avenue  
Cleveland, OH 44113  
Telephone: (216) 658-8700

Fax: (216) 658-8709  
E-mail: [info@ica-artconservation.org](mailto:info@ica-artconservation.org)  
<http://www.ica-artconservation.org>  
*Services: Conservation of Paintings, Paper, Photographs, Objects, Books, Textiles, Frames, Disaster Assistance, Analytical, Fine Art Storage, Surveys*

**Midwest Art Conservation Center  
Minneapolis Institute of Arts**

2400 Third Avenue South  
Minneapolis, MN 55404  
Telephone: (612) 870-3120  
Fax: (612) 870-3118  
E-mail: [info@preserveart.org](mailto:info@preserveart.org)  
<http://www.preserveart.org>  
*Services: Conservation of Paintings, Paper, Objects, Textiles, Analytical*

**NEDCC Northeast Document Conservation Center**

100 Brickstone Square  
Andover, MA 01810-1494  
Telephone: (978) 470-1010  
Fax: (978) 475-6021  
E-mail: [info@nedcc.org](mailto:info@nedcc.org)  
<http://www.nedcc.org>  
*Services: Conservation of Books, Paper, Photographs, Digitization, Audio Reformatting, Surveys*

**Straus Center for Conservation  
Harvard University Art Museums**

32 Quincy Street  
Cambridge, MA 02138  
Telephone: (617) 495-2392  
Fax: (617) 495-0322  
E-mail: [lie@fas.harvard.edu](mailto:lie@fas.harvard.edu)  
<https://www.harvardartmuseums.org/teaching-and-research/research-centers/straus-center-for-conservation-and-technical-studies>  
*Services: Conservation of Paintings, Paper, Objects, Analytical*

**The Textile Conservation Workshop**

3 Main Street  
South Salem, NY 10590  
Telephone: (914) 763-5805  
E-mail: [textile@bestweb.net](mailto:textile@bestweb.net)  
<http://www.textileconservationworkshop.org/>  
*Services: Conservation of Textiles, Analytical*

**Williamstown Art Conservation Center**

227 South Street  
Williamstown, MA 01267  
Telephone: (413) 458-5741  
Fax: (413) 458-2314  
E-mail: [wacc@williamstownart.org](mailto:wacc@williamstownart.org)  
<http://www.williamstownart.org>  
*Services: Conservation of Paintings, Paper, Photographs, Objects, Textiles, Furniture, Frames, Sculpture, Imaging, Analytical*

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