# Condition checking and technical assessment

## Definition

Documenting the make-up and condition of objects, and noting any resulting recommendations.

## Scope

There are many situations where you might do this, so you will often use this procedure together with others. As well as visual checks, the procedure might involve technical assessments such as scientific tests on material samples. Condition checks also inform recommendations for treating, storing and using objects. Over time, the resulting records provide an audit trail of changes to objects.

This procedure is closely linked to ***Collections care and conservation***, with several checks or assessments likely in the course of conservation treatment.

## The Spectrum standard

You should have a **policy** covering the condition checking and technical assessment of objects. This could either be a standalone document or part of a wider collections management policy. Either way, in deciding your policy you will most likely need to consider these questions:

- Who is responsible for checking the condition of your objects?
- How often will you normally check the condition of objects in different categories of risk?
- What factors should trigger specific condition checks (eg other collection management procedures)?
- What standard of checking and recording (eg images) is required for each procedure, and do the right people have the skills and training needed?
- What should happen if there are concerns about the condition of objects?
- Do you allow technical assessments that involve damaging objects by taking samples for destructive testing?

You should also have a written **procedure** that explains the steps to follow when managing and carrying out condition checks and technical assessments.

Spectrum's suggested procedure is a useful starting point, but however you do it, your own procedure should meet the following minimum requirements:

| Minimum requirement | Why this is important |
|---|---|
| You monitor and record the condition of your collections according to the schedule set out in your policy. | You build up information over time that can help you plan the care of your collection as a whole. |
| Your staff and volunteers know when a condition check is needed as part of another procedure, and either how to do it or who to ask. | You check the condition of objects at points of risk (eg before and after moving them).<br>You have well-documented evidence should any problem arise over alleged damage. |
| You schedule condition checks as appropriate after any significant change to an object's use or environment. | Any adverse impact is picked up before lasting damage is done. |
| All condition checks are documented and the information can be accessed via the relevant object numbers. | You can find condition information for specific objects when you need it. |
| You record the date, name of the condition checker and the reason for checking. | You can audit condition checks.<br>You can flag up problems with other procedures if condition checks are not recorded when they should be. |
| Your staff and volunteers know what to do if they have concerns about the condition of any objects. | Potential problems are reported to the right people in a timely way. |

# Suggested procedure

## Requesting a check/assessment

A condition check or technical assessment of an object is usually prompted by another Spectrum procedure. When many objects are involved, you may need to check a sample rather than all of them.

### Do the objects need to be moved to be checked?

Checks should be made in good light so that the true colour and condition of the objects can be recorded. You may also need materials and equipment, and potentially a suitable quarantine area if the objects are infested or contain hazardous materials. If you need to move objects to check them, ***go to Location and movement control***.

# Carrying out a check/assessment

## Carry out the check or assessment.

Your policy should say who is authorised to carry out condition checks and technical assessments, and when, in particular, professional conservators are needed. (See **Note 1**) Where available, you should refer to previous condition checks and other relevant information such as hazard notes and handling recommendations.

## Where possible take photographs.

Photographic records are highly desirable (and may be required by lenders, insurers or indemnifiers). Use sketches or diagrams in addition to photographs to indicate areas of loss or damage. Go to ***Reproduction***.

## Record information about the check or assessment.

Recording the following information about the checking or assessment process:

**Object identification information** or **Object entry information**

- ***Object number*** or ***Entry number*** of all the objects, or groups of object that were checked or assessed.

**Condition check/technical assessment information**

- A reference number for the condition check or technical assessment event - ***Condition check/assessment reference number***.
- ***Condition check/assessment date*** (use a standard format).
- Name of the condition checker/technical assessor - ***Condition checker/assessor*** (use a standard form of name).
- Method used in the condition check/assessment - ***Condition check/assessment method*** (use a standard term source).
- Reason for the condition check/assessment - ***Condition check/assessment reason*** (use a standard term source).
- Any other information not already recorded (eg that a check was made in poor lighting conditions) - ***Condition check/assessment note***.

## Record information about the result of the check or assessment.

The condition information may be recorded on an entry record, a catalogue record or on a separate record with access provided from other documentation files. This can be duplicated in the form of an 'object passport' to remain with the object identifying special conditions or hazards. Record as much detail about the condition of the object as required by the procedure. For example:

- A brief comment (eg fair, cracked lid) when an object enters your premises.
- A full technical assessment carried out by a conservator to determine the make-up of the object and conservation actions which may be required. The condition of the object should be recorded before any treatment takes place.

Record the following as needed:

**Object condition and technical assessment information**

- ***Completeness*** (use a standard term source).
  - ***Completeness date*** (use a standard format).
  - ***Completeness note***.
- ***Condition*** (use a standard term source).
  - ***Condition date*** (use a standard format).
  - ***Condition note***.
- ***Technical assessment*** (if there is one). Record here, for example, the actions which should be taken to improve the object's surrounding environment.
  - ***Technical assessment date*** (use a standard format).
- ***Conservation treatment priority*** (use a standard term source).
- ***Environmental condition note*** (if there is one).
  - ***Environmental condition note date*** (use a standard format).
- ***Hazard*** (if there is one) (use a standard term source).
  - ***Hazard date*** (use a standard format).
  - ***Hazards note***.
- ***Next condition check/assessment date*** (use a standard format).

**Object requirement information**

- ***Display recommendations***.
- ***Environmental recommendations***.
- ***Handling recommendations***.
- ***Packing recommendations***.
- ***Special requirements***.
- ***Storage recommendations***.

**Object conservation and treatment information**

- If relevant, next check date after conservation - ***Recall date*** (use a standard format).

# Responding to a check/assessment

## Update object records with any recommendations on storage, handling, etc.

If the results of the check or assessment were not recorded directly into the relevant object records, update these so that any important hazard notes or care recommendations are available to others. Note the ***Document location*** of any filed reports so that you and others can find them in future.

### Does the check cause concern?

If the condition of the object gives cause for concern, or if it differs from that recorded in previous condition checks, get the opinion of a conservator or other appropriate specialist. Go to ***Collections care and conservation***.

If there is no cause for concern return to the procedure that prompted the check.

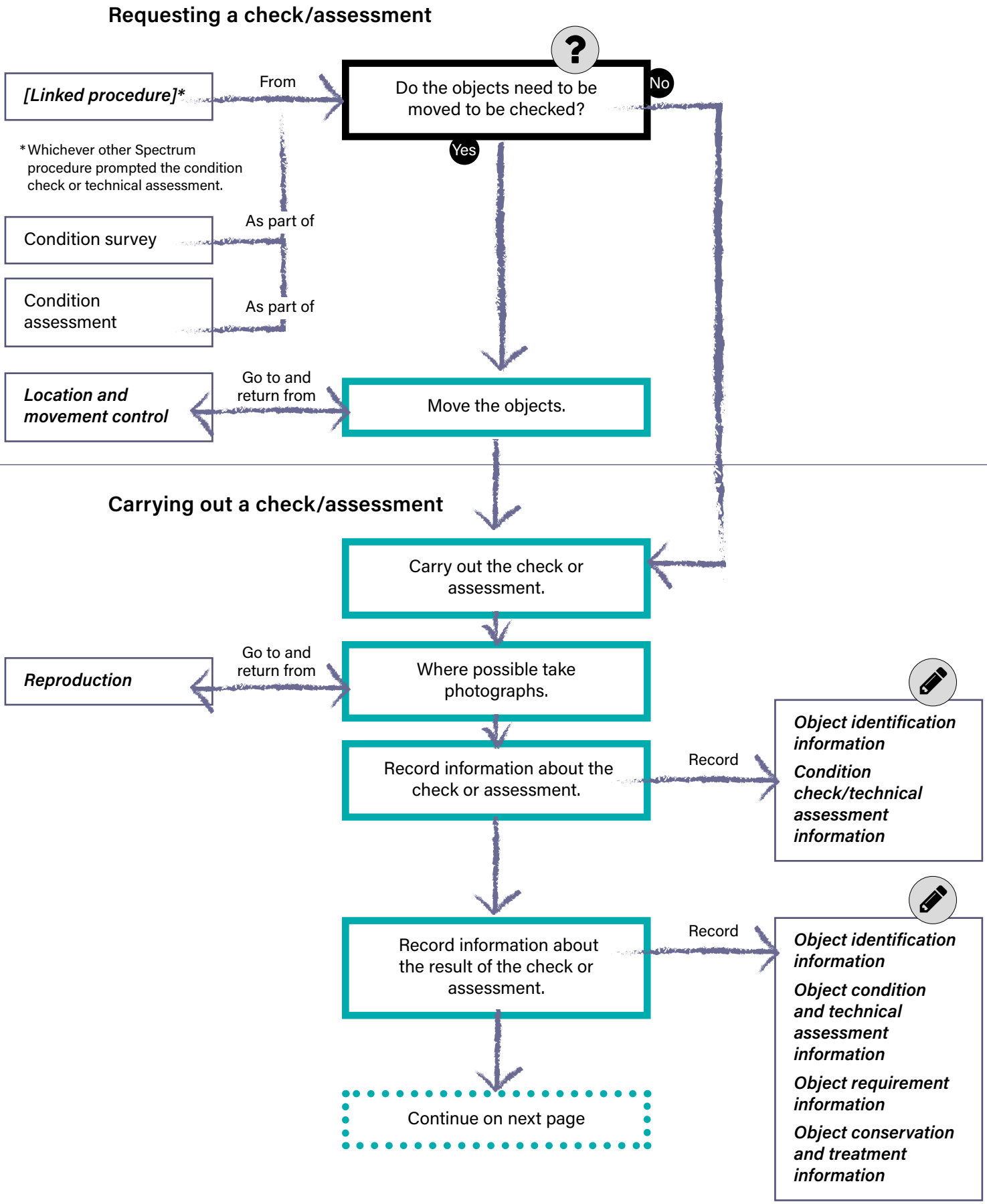
# Guidance notes

## Note 1: Standards of condition checking and recording

You might find it useful to specify three levels of condition checking, depending on the complexity of the reporting and the level of expertise required:

- **Condition check** carried out by potentially any member of staff or volunteer (eg when objects arrive as enquiries, loans or potential acquisitions).
- **Condition report** prepared by staff with conservation skills or, ideally, a professional conservator (eg for objects going on loan and before conservation treatments involving tools or chemicals).
- **Full condition report** prepared by a professional conservator before major conservation treatment (eg the restoration of a complex object with many components).

# Condition checking and technical assessment



## Responding to a check/assessment