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**Conservation Plans:
Are they of value for restoration work
on tramway and other vehicles?**

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1. Introduction

1.1 Background

Many tools are needed to run and maintain an operating tramway museum. Most of us are familiar with the wrenches, bars and overhead tools needed to keep the various facets of our museums in operational order. A conservation plan is another tool that is just as useful to a tramway museum. It provides comprehensive information on the significance of an historic vehicle in its care. Equally importantly it also sets out a plan to ensure that that significance is retained in the long term.

We are probably all familiar with instances of unnecessary rework carried out on vehicles we care for because of changes in circumstances at our respective museums; perhaps when new ideas took hold after a change in control. In the absence of a guiding document for restoration or conservation work this has often resulted in work being done that has subsequently required redoing. A conservation plan helps to minimize these effects through providing a long term plan for the work.

A conservation plan also helps to remind us that we are dealing with historic vehicles and that retaining them, in as authentic condition as possible, for the enjoyment of future generations is one of our functions. Often, we can become so familiar with a museum vehicle and its operations that its historic nature can be diminished in our thoughts and actions.

The plan also helps the public as it gives the museum management a ready source of interpretation material, stories and photographs, properly authenticated, that can be used in advertising, display brochures and on interpretation panels.

Most of all though a conservation plan sets out work specifications that respect the work methods and materials used in the vehicle. This enables the highest possible standard of authenticity to be maintained in any work carried out on the vehicle.

This paper outlines the nature of a conservation plan and what makes it such a valuable tool for a tramway museum operating and caring for historic vehicles.

2.0 Function of Conservation Plans

Conservation plans have been employed for many years to identify:

- the significance and authenticity of historic places (i.e. sites and buildings)
- a framework of policies and actions that will ensure that the significance and authenticity of the historic place is maintained in the future

Most conservation plans have until recently focussed on historic places. The policies proposed in them have usually been guided by the principles of the International Council on Monuments and Sites (ICOMOS) Charter for the Conservation and Restoration of Monuments or a derivative of it (see history of conservation charters in Appendix 1). In Australia the derivative is the *Australian ICOMOS Burra Charter for the Conservation of Places of Cultural Significance*, and in New Zealand the *ICOMOS New Zealand Charter for the Conservation of Places of Heritage Value*. The principles in the New Zealand charter have also been applied to conservation work on historic vehicles.

On the international scene, however, with the growth of museum tourist tramways and railways in Europe a need was seen for a charter that specifically dealt with historic railed vehicles. This was recognized by the Fédération Européen des Chemins de Fer Touristiques et Historiques or European Federation of Museum and Tourist Railways (FEDECRAIL).

In 2005 the FEDECRAIL 'Riga Charter' was adopted at Riga, Latvia. This charter identified principles and guidelines from which policies could be derived that suited maintenance, conservation, restoration and operation of historic railed vehicles at museum and tourist railways (including tramways). The charter followed a similar one (the Barcelona Charter) that was adopted in 2001 by the European Maritime Heritage Congress (EMHC) for maritime objects such as operational historic ships.

The Riga Charter has since been adopted by FEDECRAIL members in the United Kingdom, Ireland, Russia, Latvia, Estonia, Sweden, Finland, Norway, Denmark, Czech Republic, Austria, Germany, the Netherlands, Belgium, France, Switzerland, Spain, Italy, and Greece. It has still to gain a wider formal acceptance elsewhere.

Both the Riga and Barcelona Charters are adaptations of the long-standing International Council of Monuments and Sites (ICOMOS) International Charter for the Conservation and Restoration of Monuments first adopted in 1964 and now in its 1966 version. This ICOMOS charter was also used as the basis for the Australian Burra Charter for the Conservation of Places of Cultural Significance and the New Zealand ICOMOS Charter for the Conservation of Places of Heritage Value. The general principles in each of these ICOMOS charters are similar and more detailed than those contained in the Riga Charter.

Both the Burra and New Zealand ICOMOS charters for the conservation of places of heritage value as well as the Riga Charter have an underlying aim of doing as much as necessary to care for an historic vehicle/place and to make it useable, but otherwise change it as little as possible so that its cultural significance is retained.

The source of the charter principles used in a conservation plan needs to be identified as this provides credibility to the particular conservation measures proposed.

3.0 What does a well-planned conservation plan contain?

There is no one agreed-formula for what should be included in a well-researched conservation plan but the following list is a good example of the contents:

- a written and signed statement from the owner that the plan for the historic vehicle has been adopted and will be faithfully implemented
- an index
- the name of the author and the skills and attributes of that person
- a set of recommendations arising from the findings of the report
- a verifiable history of the historic vehicle
- a chronology
- a description of the original and any later altered physical features of the vehicle
- a social history of the vehicle including its past, present and future cultural connections
- a photographic survey of the vehicle both past and present

- statements of significance of the vehicle from historical, physical, technological and cultural points of view
- a statement of the various threats that the vehicle faces, and will face, and recommended ways these can be overcome. Threats include fire, wind, indifference, poor management, poor storage, poor interpretation, inappropriate signage etc
- a statement of which conservation policies have been adopted by the plan i.e ICOMOS Charter, Burra Charter etc
- how work standards are controlled on the vehicle
- how changes to the plan are initiated and made
- what period the vehicle is being conserved/restored to
- a list of what parts/fabric of the vehicle are subject to interventions
- a bibliography and a schedule of references to the origin of significant statements in the plan
- a set of appendices providing support information such as drawings, plans etc

James Semple Kerr's 'The Conservation Plan' (1996) published by the National Trust of Victoria, Australia also contains useful guidance on the structuring of conservation plans.

4.0 Value of a conservation plan to a tramway museum

A conservation plan properly and professionally prepared will:

- give a well-researched and a verifiable history of the historic vehicle
- identify the vehicle's historic, cultural, technological and social significance and value
- highlight any new information discovered about the vehicle; or re-emphasise the significance of other information that may have become overlooked
- identify the vehicle's current condition through photographs, sketches, measured drawings and reports
- contain an assessment of the vehicle's fabric in terms of its significance
- provide a plan describing how to ensure that the vehicle's significance is maintained and thereby lessen any potential rework
- provide a work plan, that if followed, should ensure that the most accurate and quality results are achieved in any restoration/conservation work
- contain a written commitment from the owner of the historic vehicle that the recommendations of the plan have been adopted and will be applied
- contain an outline of the skills of the writer and the contributors to the plan. This may be important to the museum if further work on the plan is required or questions on some aspect of the plan are raised

- allow for updating should new research material come to hand or circumstances arise that change the way the vehicle should be treated
- provide independent support for funding applications related to the vehicle
- provide reliable and verifiable data (including stories) for interpretation purposes relating to the vehicle
- provide a reasoned planning tool for the owner during budget preparation
- reduce the likelihood of 'wives tales' gaining credence about the vehicle

5.0 Who should prepare a conservation plan

To be effective and credible to those inside (i.e. members) as well as outside (e.g. funders) a museum a conservation plan needs to be prepared:

- by a credible expert well-versed in the subject area of the research
- in accord with accepted and relevant heritage principles as these add value and 'weight' to the views, conclusions and recommendations made

6.0 What will a conservation plan cost?

This depends on who researches and writes the plan and what agreement they come to with the owner of the historic vehicle. In New Zealand some funding bodies will assist with the cost of the preparation of a conservation plan. Then the plan itself can support later funding applications for work on the vehicle it is the focus of. Commercially produced conservation plans often fall into the \$5, 000 to \$10,000 range in both Australia and New Zealand.

7.0 What is the benefit of keeping historic vehicles authentic?

There is always a duty of care on museums (if not a statutory obligation) to manage their collections in such a way that the significance of items in the collections is not reduced through the ill-considered actions or inactions of others. Keeping items authentic draws tourists and brings in some of the funding needed to keep the collection in good order.

Research by Tourism New Zealand in 2003 showed that about 60% of interactive travellers¹ to New Zealand preferred cultural experiences that were authentic. These international tourists were in the 25 to 34 and 50 to 64 year age groups.

Additionally many museums were founded on the desire to 'preserve' historic vehicles as they operated at the time they came to the museum and this is often specifically stated in a museum's constitution.

¹ Interactive Travellers are regular international travellers who consume a wide range of tourism products and services. They are travellers who seek out new experiences that involve engagement and interaction, and they demonstrate respect for natural, social and cultural environments

8.0 Conclusion

It was surprising for me to discover some years ago that there were no internationally agreed standards or yardsticks by which conservation or restoration projects could be planned and executed for 'railed' or movable vehicles.

Even the National Railway Museum at York and the National Tramway Museum at Crich, two organisations that many museums look to for leadership in this area, advised that they had no agreed standards that were consistently utilized on their in-house conservation and restoration projects. Each project instead was considered on its merits.

The best that could be found on standards at the time for historic vehicles was a 1997 publication produced by the Museums and Galleries Commission in the United Kingdom entitled 'Larger and Working Objects' and this document whilst a useful start did not relate the conservation or restoration process to the significance of the item.

Why is all this important?

- Many of our museums have vehicles that have local, national or even international transport (or other) significance. Some vehicles have a combination of two or more of these attributes. A common, and accepted, means of evaluating their significance and methods of conservation and restoration would be helpful. This is especially so where funding is being sought for the restoration work. In addition most of our museums have aims that include managing and protecting these significant historic items from the effects of deterioration. Success with this aim will ensure that the vehicle's authenticity is maintained to the highest degree possible. It can then be appreciated and enjoyed by members, future members, visitors and later generations.
- Surveys by Tourism New Zealand of interactive tourists established that 60% of the international tourists valued and want to have authentic interactive experiences at historic places as a way of getting to know about the real New Zealand. It is possible that similar statistics apply to Australia.
- Few national heritage organisations or governments have moved into the area of classifying moveable heritage items in the way that, for many years, historic buildings have been graded. One of the few exceptions to this is the historic cable car system in San Francisco which was designated in January 1964 as a 'moving' National Historic Landmark by the Secretary of the Interior, United States Federal Government.
- Funding and support agencies often want to know in funding applications what yardsticks have been used to measure the significance of an historic vehicle and what conservation policies have been adopted for it.

For the reasons above I believe there is value in having conservation plans prepared for historic tramway vehicles utilizing the best of the applicable principles from the charters that are accepted as being good practice in our respective countries. Details of each of the current charters can be found on the world wide web.

I recommend this course for your consideration.

Appendix 1: Origin of the various conservation charters

An international charter, the Athens Charter, which set out principles to be applied in the restoration of historic monuments was first proposed and agreed in 1931 at the First International Congress of Architects and Technicians of Historic Monuments held in Athens.

In 1964 the International Council on Monuments and Sites (ICOMOS) adopted and promoted the Venice Charter for the conservation and restoration of monuments and sites (now the 1966 version). Both ICOMOS Australia and ICOMOS New Zealand have adapted and adopted the Venice Charter to suit their respective country's heritage needs.

In Australia the '*Australian ICOMOS Burra Charter for the Conservation of Places of Cultural Significance*' resulted. In New Zealand the '*ICOMOS New Zealand Charter for the Conservation of Places of Heritage Value*' was the outcome. Both of these charters were intended for land-based static objects. The range of other ICOMOS charters has also increased to cover gardens, archaeological sites etc.

Maritime, railway and tramway heritage were not specifically covered in these early charters if the historic object was an operational ship, railway or tramway vehicle or similar.

In 2001 the Venice Charter was adapted by the European Maritime Heritage Congress in Barcelona to embrace maritime objects such as historic ships. This charter is now known as the '*Barcelona Charter*'.

Similarly the Fédération Européenne des Chemins de Fer Touristiques et Historiques or European Federation of Museum and Tourist Railways (FEDECRAIL) adopted the '*Riga Charter*' in 2005 for museum and historic tourist railways (including tramways). This charter has now been accepted by many of the FEDECRAIL members organisations in Europe and at least one European government (parts have been incorporated into Italian law).

Appendix 2: References

Stephen Ball (edited by Peter Windsor) Larger and working objects A guide to their preservation and care: 1997 Museums and Galleries Commission, London, England