



CANTERBURY RAILWAY SOCIETY INC.
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Operations Group Society Procedure

Ferrymead Railway

Subject: Collections and Restoration Policy

CSP-107

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1. DEFINITIONS:

The following are definitions used within this document: -

- Society—the Canterbury Railway Society.
- CRS—the Canterbury Railway Society.
- Executive—the Executive Committee of the CRS.
- HOD—Heads of Departments of the CRS.
- GM—General Manager of the CRS.

2. Introduction

The Canterbury Railway Society Inc. (CRS) collection consists of documentary materials, railway artefacts, buildings, an operation railway and locomotives and rolling stock. The Societies' collection is acquired, preserved, researched, exhibited and/or interpreted to further the objects of the CRS.

3. Objects of the CRS.

The objects of the CRS, as detailed in the constitution adopted in 2015 are;

- a) To preserve the site of the old Ferrymead Branch Railway as an historic place
- b) To establish and operate a working railway on the original formation of the old Ferrymead Branch Railway near Christchurch. This includes all necessary trackwork, buildings and structures in accordance with New Zealand practice, particularly that of New Zealand Railways but also its predecessors and successors.
- c) To promote knowledge of and interest in matters of railway interest by means of meetings, visits, discussions, excursions, lectures, exhibitions, publications and other forms of publicity, instruction and entertainment.

- d) To ensure, where possible and appropriate, the preservation of the site of the old Ferrymead Branch Railway as an historic place and private and public collections of any material, including models, pertaining to railways in general.
- e) To affiliate with other and / or maintain liaison with any other organisation or group having similar aims and objects.

4. Collection Philosophy

The Society will approach the preservation and conservation of the collection with caution and great sensitivity. Care, conservation and restoration of locomotives, cars and artefacts will be based solidly on documentation, observations, careful research, and the results of industrial archaeology and conscious curatorial decision. Restoration of an artefact is to a historically accurate and verifiably achievable date in the piece's history. The restoration process whenever possible employs conventional railway practices normally used in railway workshops consistent with the use, materials and practices employed at the time. It should also be consistent with practical limitations for the operation of the equipment. All work will be well documented and whenever possible will be reversible.

Exhibit Philosophy

Where displays of the society collection are provided, they will be rotated on a semi-routine basis in a manner showing the railways through different periods of history and/or uses of the equipment that would illustrate to the public how the items were used and provide a changing scene at the railway.

5. Collections Management Committee

The Collection Management Committee serves as a forum for review, support, and decision making for all restoration projects as well as managing and developing the collections. The Collection Management Committee shall consist of a Collections Manager, appointed by the CRS Executive, (This member need not be an elected officer) and a supporting sub-committee of up to four other persons (supplied from the HOD). The Collection Management Committee will meet as often as necessary, but not less than twice annually. The Collections Manager will attend Head of Department (HOD) meetings as required

Decision Making Process

The members of the Collection Management Committee will always work toward consensus. When consensus cannot be reached, and a decision is necessary, the members of the Collection Management Committee have an equal vote. The Collection Management Committee may consult with others knowledgeable in appropriate fields as necessary.

Collective Responsibilities

The committee will review the Collections and Restoration plan on an annual basis and make any appropriate changes after discussions with the CRS Executive and HOD. The committee will also address ethical, problematic, sensitive, or controversial collection issues as they arise and take appropriate action.

The committee will develop and review the Object Condition Report for all rail vehicles and rolling stock at the railway as outlined in section 8 regarding Collection Care.

Under the guidelines of the Acquisition Policy as outlined in section 9 the committee will review potential acquisitions involving conditions or restraint and recommend appropriate action to the HOD who will then advise the CRS Executive for approval.

Under the guidance of the De-Accession Policy, the committee will review potential de-accession of objects from the museum and recommend appropriate action to the HOD who will then advise the CRS Executive

The committee will review all proposals for restoration of equipment as outlined in section 7 regarding Collection Care.

6.Collection Classifications

The Society recognizes that the best interests of preservation and interpretation may not always be compatible. In order to accommodate these potentially conflicting interests, four categories of collections are defined;

- Permanent
- Special
- Utility and Parts
- Small Items

Accessioned Material

The CRS believes that responsible use of original objects is an effective way to impart knowledge and understanding of New Zealand's railway history as well

as the rail transportation experience. It is the policy of the CRS to avoid using original objects in any way that would be *unnecessarily* consumptive of these objects.

Primary Collection: This is the bulk of the collection; these objects are historic in nature, but the Society has decided to make them available for appropriate use under the supervision of the Collection Committee. These objects must be respected for their historic value and must not be exposed to consumptive use whenever possible.

Special Collection: These are objects, which either because of their significance and/or their deteriorated or fragile condition requires special care and limited use under the supervision of the Collection Committee. The Special Collection is intended for study and not for use.

Utility Collections: These are other objects that are useful in the day-to-day operations of the museum. These will include the same types of objects found in the Permanent Collection the Society intends to maintain or restore these items as long as they are useful, but ultimately, they may be expendable. All acquisitions or disposals of rail vehicles of the utility collection require the approval of the Collection committee.

Utility objects may not be listed in the railway's accession register, but appropriate records should be kept in accordance with accepted business and accounting procedures.

Trade or resale of utility equipment may be conducted by the Society on an occasional basis, but only after careful consideration of the potential for diversion of institutional resources from the Society's other collections. The Society is not in the railway salvage business or used equipment business, and will exercise due care to avoid even the appearance of same. In acquiring collection-related utility equipment from government or industry

surplus programs, the Society will comply with all applicable laws and rules including statutes concerning the resale of surplus equipment.

Parts and repair items are not generally recognized as being a part of the collection, but attention is called to the historic nature and difficulty in replacing certain parts. A rail vehicle may have been acquired as a source of parts and repair items and therefore will not be included in the permanent collection.

Small Items

This includes, but is not limited to, items typically held within the library and archive. Such items shall be catalogued and stored in appropriate conditions. Other items will include ephemera such as posters and 'dressing' such as sacks, suitcases etc.

Items held in the library and archives will follow a similar process to the permanent collection. However accession and de-accession will be via the catalogue and disposals shall be approved by the Executive at the recommendation of the librarian / archivist.

7. Collection Care

The collections of the CRS are held in trust for the benefit of the public. The Society recognizes its responsibility to care for these objects, and will continually perform self-analysis to determine its performance in this regard, and take action to address recognized problems or concerns. Although the society operates a portion of its Permanent Collection, it recognizes these vehicles have a finite operational life, and will avoid using these vehicles in any way that would unnecessarily consume the object or artefact. The Collection Management Committee will report to the CRS Executive on an annual basis the state of the CRS collection.

Conservation

To preserve its collection, the CRS will work towards providing appropriate indoor storage space *as available and whenever necessary* for the objects in the Permanent Collection. Other conservation measures will include, as needed, temporary roofs, tarpaulins and other protective coverings, which may be applied to rail vehicles that are without storage space. The goal of this intervention will be to stabilize the object to prevent further deterioration.

Object Condition Reports

Object Condition Reports are to be developed for all rail vehicles at the railway, beginning with the Permanent Collection. After completing these reports, the condition of the rail vehicles in the Permanent Collection will be reviewed at least every five years, and this review appended to the Object Condition Report.

8. Running Maintenance

The Society recognizes that by operating part of its collection to demonstrate railway service, regular maintenance must be performed to keep these rail vehicles in safe operating condition. To help distinguish between maintenance work and restoration work, the following definition is offered. Maintenance consists of;

- (1) Repairing an item in a manner that does not in any way change the item, or
- (2) Replacement of so-called “consumables,” which are items such as light bulbs, lubricants, wear plates, paint, and other parts designed as replaceable elements of a mechanical system.

Any work beyond that which is described as maintenance above is considered restoration requiring use of the formal proposal process. Substantive modification of a rail vehicle in the permanent collection to facilitate operation or maintenance, including the removal of original parts or installation of replacement parts other than the type originally specified, is considered to be outside the scope of normal maintenance and requires use of the formal restoration proposal process.

9. Restoration

Restoration is considered work on a rail vehicle other than conservation or maintenance. The purpose of a restoration is to return an object to a specific configuration and appearance, which it had at some point during its career with NZR, industrial service or the predecessors / successors of NZR. Objects in the Permanent Collection should be restored to an appearance held during its service although other regulatory requirements may require mechanical or cosmetic changes on operating vehicles. In cases where a specific appearance could tell a wider story as part of a train it may be permitted to restore a vehicle to a condition typical of its class that the specific vehicle never bore.

Approval for Restorations

It is the policy of the CRS that all restoration projects must go through a standard proposal/review/approval process **prior to commencing work**. A proposal utilizing the format outlined in the Requirements for Collections Project Proposal document in Appendix A must be written for all restoration projects. The Collections Management Committee will then review this proposal. As needed, the reviewed proposal will be returned to the individual who initiated the proposal with comments and requests for additional information. If the Collections Management Committee approves the proposal, they will bring the proposal to the Executive Committee for review, approval, and authorization of funds as applicable.

Documentation of Restorations

It is considered best practice to document ongoing restoration work by written and photographic records as well as capturing samples of original fabric. The documentation will be required to clearly identify all components and sections of the original vehicle which were replaced as well as any modifications or substitutions made during the course of the work.

Risk Management

The collections organization will seek to identify risks to the collection and make recommendations for their mitigation and management.

10. Acquisition

It is the policy of the CRS to own all objects entrusted to its long-term care. It is also the policy of the Society to seek unconditional gifts to be used in the best interest of the Society. Offers of conditional gifts, leases, and loans must be evaluated for their potential to divert institutional resources from Society-owned objects. It is also the Society's policy to minimize in the future any privately owned equipment to be stored on Society Property.

Criteria for evaluating all acquisitions:

All proposed acquisitions, including potential utility items, are to be evaluated against the criteria listed below. In cases of utility items acquired for trade or other use, exceptions can be granted for deviation from relevance to the mission statement, but only after careful consideration of the proposal's potential to divert institutional resources away from the Society's other collections.

- **Relevance to the CRS Mission Statement** – Strong preference is given to objects from the focus railways mentioned in section 3, but objects outside of the geographical area of interest may be considered if a similar object from the area is not available, and the object will fill a critical gap in the collection. Factors such as rarity or typicality, provenance and interpretive potential will be reviewed when considering relevance.
- **Present Condition** – A complete object is preferred over an incomplete one, however an incomplete object or one that is in poor condition may be considered if a better example is not known to be available and it fills a gap in the collection.

The Society's ability to care and conserve the object – An evaluation of the requirements for storage and conservation, (including track space and indoor storage space), must be made. These requirements must be carefully weighed against the needs of the existing collection.

- **Duplication of existing objects in the collection** – Duplication alone, in either the CRS or other Society collections, is not necessarily a reason for rejection, as many such objects operated in trains. If the duplicate already in the collection is in poorer condition, it may become eligible for de-accessioning and/or disposal. Duplication, which is considered not be in the best interest of the Society, can be a reason for rejection.
- **Completeness of title** – The Society shall verify ownership by appropriate means prior to accepting gift or entering into a purchase agreement. The society will not acquire objects when legal ownership cannot be substantiated to the satisfaction of the Executive Committee by using accepted museum standards as a guide.

Accession into the Permanent or Special Collection

Accession is the formal process of bringing an object into the Permanent Collection. As stated in section 7, the primary intention of the Permanent Collection is to preserve these objects in perpetuity. The only way to remove objects from the Permanent Collection is through the formal de-accession process

Documentation

Objects accepted for accession are to be registered in accordance with accepted museum registration procedures. The following information should be included:

- a deed of gift for donated objects,
- a bill of sale for purchased objects,
- Any conditions of the gift and
- a condition report.

Accessioned objects are to be recorded in the Society's accession register. Written records are to be kept providing a summary of why the object was acquired and accessioned.

11. De-accession from the Permanent or Special Collection

De-accession

From time to time, it may be beneficial for the Society to remove objects from its Permanent Collection through a process known as de-accessioning. The formal de-accession process is the only way to remove items from the Permanent Collection. Prior to starting the process, a review must be made of the relevant acquisition information including the title and condition of the gift (if any). Items that have been de-accessioned shall be removed from the accession register.

The Society is aware of its obligation to refine and upgrade its collections. However, de-accessioning should not be a regular occurrence since the Society has accepted the obligation to preserve objects and hold them in the public trust. Any perception that disposal is common could discourage donations and work against the best collecting interests of the Society.

Objects may be considered for de-accession based on the following criteria:

- The object's relevance or appropriateness to the Society's mission – as defined by the society's mission statement.
- **The object is being replaced** – The Permanent Collection can evolve by the addition of better, more complete, or more representative examples of the individual pieces. An object from the geographical area of interest may become available that will replace a similar object outside the area of geographical interest. Likewise, with the accession of a new object, an existing object may become a duplicate. Duplication alone is not necessarily a reason for de-accession, as many such objects operated in trains. In cases where it is not in the Society's interest to retain multiple examples of an object and the duplicate already in the

collection is in the poorer condition, it may become eligible for de-accessioning.

- **The object's condition** – If an object has deteriorated or has been damaged so badly as to no longer have any value, and is beyond reasonable expectations of preservation, an otherwise suitable item may be considered for de-accessioning.

Disposal

If the decision is made to de-accession an object from the permanent collection the Executive must confirm that the object is also no longer required as parts. A motion shall be placed before the General Membership at an Annual General Meeting or Special General Meeting for final approval of de-accession. This recommendation shall be based on a review of relevant acquisition information including original conditions of gift (if any). Strong preference will be given to transferring ownership to another museum or historical society wherever practical.

Options for Disposal

- Return to the donor (applies to donated items only)
- Gift, trade or sale to another public, historical or non-profit organization
- Move to the Utility collection
- Trade or sale to individuals, groups or organizations other than as described above
- Dismantle to salvage components

It is the policy of the Society that moneys or other consideration received from the disposal of a de-accessioned item be used for the benefit and support of the collection.

Written records will be kept to provide a summary of why the object was de-accessioned. The records will document the decision process, identifying how the de-accession criteria in Section 11 were applied.

12. Management of Utility, Parts and Small Items

The Executive shall be responsible for the acquisition, use and disposal of items in the utility and small items collections with the agreement from appropriate member(s) of the HOD for any special skills / knowledge that relate to the items.

13.0 Ownership of Originals

The Society places a high priority and value on owning original, authentic and well-documented original collections as opposed to reproductions, replicas or fakes.

14.0 Loans

Incoming loans - are entered into only when there is a specific need or where outright ownership is not an immediate option. The Society also enters into incoming loans when clear ownership cannot be secured or where temporary loans will likely lead to eventual Society ownership of the object.

Outgoing Loans -The Society carefully considers the staff workload, the benefits and the risks of outgoing loans. The Society prefers the loan of collections to a kindred preservation organization or other public institution for purposes of research, exhibition, and/or public programming. The Society considers longer-term outgoing loans when the preservation of an aspect of the collection can best be accomplished by another organization.

15.0 Access to Collections

As the Society's collections are held in the public trust, the Society will make every effort to provide the public with access to its collections consistent with the preservation and safety of the collection and visitors. During hours when the Society is open to the public, exhibits and the restoration facility viewing area will be open based on the availability of staff. The Society cannot promise access to all public facilities at all times. Advance requests to see particular objects in the Society's collection will always be considered.

Copyright - All items, in the main those in the library and archive that are reproduced for the public by whatever means shall be attributed to the Collection of the Canterbury Railway Society. Where an author or photographers name is known then this shall be used as a prefix e.g. Arthur Foamer, Collection Canterbury Railway Society. In turn the CRS shall respect the copyright of items it publishes on media such as online and Branchlines.

16.0 Ethics

The responsibilities of holding and protecting the Society's collections require the members, employees and trustees of the Society adhere to ethics of action and responsibilities. No individual may use their position at the Society for personal gain or benefit of others, at the expense of the museum, its mission or reputation.

To ensure that the members, volunteers, employees and managers of the Society know and realize the minimum ethical requirements for collections, the following procedures are established:

1. All Society personnel, including executive and officers, shall place stewardship of the collection as a high priority when considering the

affairs of the Society. Stewardship includes the preservation, conservation and proper display of all items in the various collections of the Society.

2. All Society personnel, including the Executive and officers, may have access to collections for the purpose of research when producing production of printed materials, or video or audio programs, by an arrangement with the librarian or curator in advance.
3. No Society personnel, including executive and officers may use their Society affiliation to promote their personal collecting activities.
4. No Society personnel, including the Executive may compete with the Society in any personal collecting activity.
5. Responsibility for the appraisal of all gifts, such as for tax purposes, rests with the donor. No Society personnel, including the Executive may serve as an appraiser of a gift to the Society.
6. While the Society recognizes the outstanding monetary and labour contribution of its members, control of collection objects rests entirely with the Society. The Society's mission and goals must take precedence over the desires or directives of any donor of cash, labour, material or collection item, except when the donation is made for a specific purpose or project and is approved by the CRS Executive Committee.