

RECOMMENDATIONS FOR REGULATING THE ACCESS TO MUSICAL INSTRUMENTS IN PUBLIC COLLECTIONS

1. Introduction

Musical instruments from widespread temporal and geographical areas have received increasing attention from the public during the past few decades. Musicians, instrument-makers and scholars are all seeking closer contact with the instruments to enhance their understanding of music and musical instrument technology. Instruments in public collections have stimulated the performance of music and the methods and techniques of the builder. They have also given impetus to scholarly research.

While access to collections is seen by most curators as desirable and necessary to increasing the understanding of our musical heritage, this has sometimes been achieved at the expense of the very instruments which form the focus of our attention. Some information has been irretrievably lost as a result of insufficiently controlled access. For many historical periods and geographical sources, the limited number of instruments which has survived has been rendered fewer still by negligence, continual use, handling, playing and measuring.

Many types of functional implements are to be found in museums. It may be more or less difficult, however, to have such objects fulfill their initial function. For better or worse, it is commonly expected that a musical instrument be kept in such condition as to be able to produce something representative of its original sound. However even the silent musical instrument can provide invaluable information which can be used by the craftsman to provide the musician with a sounding reproduction.

Musical instruments, therefore, form an important part of our cultural heritage on many levels, both musical and non-musical. The measures for their protection and preservation must take into account the multitude of aspects represented. Only thus can instruments continue to give important evidence of our musical history and serve other fields of scholarly study. It is for these reasons that the present recommendations have been formulated.

The task of the museum or public collection is largely twofold: its responsibility for the safety and preservation of its instruments and its goal to further their study and disseminate the information thus obtained. In this manner the museum acts as a link between the craftsmen, performers and scholars of today and their counterparts whose work is represented in the collection.

The present recommendations only concern themselves incidentally with those members of the public who view the displays in the normal way; the term 'visitor' will be used to denote the qualified scholar, performer or instrument-maker whose

specialised interest may require closer contact with the instruments. It cannot be overstressed that direct access to, and physical contact with, the instruments held in a public collection must be regarded as an exceptional service which is only to be extended to the well-qualified visitor in the interests of serious study.

These recommendations are intended to encourage museums and individuals to continue the re-examination of our musical heritage while, at the same time, suggesting basic guidelines for permitting access which will protect the interests of the instruments, the public and the museum. They have been formulated in the light of experience drawn from specialised and general collections, and apply equally to instruments held in large and small museums; they represent a reasonable minimum of requirements for regulating access. They do not release the curator from any responsibility but will, of course, be interpreted in the light of individual circumstances. They should also be read by the visitor in connection with an application for access.

2. Initial Conditions of Access

2.1. Applicants should be informed of relevant security regulations and of the special difficulties which may be involved in removing instruments from display. All such activity will normally be conducted during working hours.

2.2. A written application for an appointment should be made well in advance of the proposed visit. Visitors should be prepared to produce written references or credentials. Applicants should state the reason, nature and purpose of the examination.

2.3. Access to instruments may be refused in cases where the condition of the instrument precludes its examination. Where adequate documentation is available through the museum, the applicant should be required to show good cause for duplicating any earlier work.

2.4. All notes, photographs, drawings, etc. made by the visitor should become a part of the museum's documentary record of the instrument in question. The visitor should provide the museum with copies of all such material and sign a written agreement allowing the museum to place it at the disposal of subsequent visitors interested in the same instrument.

2.5. All access to the collections takes place on the museum's own terms. If there is reason to assume that the visitor may ignore the museum's regulations, the visit may be denied or terminated.

2.6. All devices and procedures used in the examination must be non-harmful. In absence of the ability to judge their suitability, permission should not be granted for their use.

3. General protection from damage

3.1. The safe handling of museum instruments involves techniques which are not necessarily familiar either to musical instrument makers, organologists or musicians. The visitor may, however, have more general knowledge about a specific type of instrument than does any member of the museum staff, and therefore feel him or herself the better judge of proper handling technique. With all respect to the expert knowledge of the visitor, the museum must retain the sole right to decide what is safe and therefore permissible.

3.2. All handling involves some risk to the instrument. Both its removal from display or storage and its dismantling for inspection may cause anything from wear and seemingly inconsequential damage such as fingermarks, to severe damage such as breaking the tenon of a woodwind. This type of damage can be guarded against by general care: handling instruments with clean hands (gloved for metal objects), placing them on adequately-dimensioned padded worktables, etc. However, in many cases an

operation is so delicate that it should only be undertaken by a museum staff member to avoid any question of responsibility for possible damage. The area in which the examination is to be conducted should not differ in either temperature or relative humidity from the storage or display area.

3.3. The visitor should not be allowed to make impressions of the instrument or bring any adhesive material into contact with it. Rubbings and tracings may be made only under the immediate supervision of a museum staff member and only if a suitable photograph cannot be taken.

3.4. Visitors must not be allowed to take samples of instrument materials for analytical purposes unless specifically requested by the museum.

4. Measuring tools and techniques

4.1. Although modern measurement technology is quite capable of dealing safely with the problems involved in measuring musical instruments (optical and acoustical holography, photogrammetry, radiography), such contact-free techniques will only rarely be available in a museum situation. The measuring tools likely to be used by the museum visitor require mechanical contact between the tool and the musical instrument. There are no entirely safe measuring techniques. Judging the suitability of any suggested procedure requires a good deal of experience and it is not possible to provide concise guidelines. Any procedure which is clearly potentially dangerous – for example, the risk of a tool scratching a delicate surface, or the use of force to dismantle an instrument - should be regarded as unacceptable. The skill of the operator should be considered as carefully as the suitability of the tools.

4.2. There are no ideally accurate measuring tools. Any measurement will therefore be an approximation of the sought ('true') value. Calipers, micrometers, and similar tools are accurate only to the extent that they make firm physical contact with the object being measured. The softer the contact surface of the tool is, the less likely it is to cause damage, but unfortunately the less likely it is to produce highly accurate readings. A compromise must be made between the requirements of safety and those of accuracy. For this reason it has become common museum practice to forbid the use of measuring tools made of metal, although it must not be assumed that all non-metal implements are safe. It is recommended that the museum itself provide at least the basic tools for taking measurements.

4.3. It may be necessary to modify standard measuring tools: for example, steel calipers must be equipped with non-damaging plastic tips, or replaced by ones made totally of plastic. Linen or plastic dressmakers' tapes are recommended in place of the steel retractable type (tapes can be checked periodically against a steel ruler for accuracy). Flexible draftsman's curves and mechanical devices for copying mouldings should not be used, cut cardboard templates providing a much safer and more accurate method of describing complex curves.

4.4. Specific conditions for the measurement of some major instrument types.

4.4.1. Wind Instruments

The adequate metric description of a woodwind instrument involves the measurement of the exterior profile, its bore and its tonehole system. A brass instrument presents similar problems, however wall thickness rather than bore dimensions will be measured and a valve mechanism may need description. The exterior profile of a woodwind instrument can be traced on a piece of paper. Measurements taken with a plastic caliper can then be filled in. There are two basic types of woodwind bore measuring devices. The distance between the measuring surfaces of one are set prior to inserting the tool into the instrument. The second type of device has a spring-loaded flexible measuring head. The latter is simpler and more rapid in use but has the extreme disadvantage of being in constant contact with the bore surface thereby leaving continuous 'tracks'.

Commercial bore gauges with dial indicators must not be used for this reason. Purpose-designed devices may have an acceptably low spring pressure. The fixed measuring heads are capable of more sensitive use as the degree of tactile feedback between the device and its operator is greater. In skilled hands it can provide results of great accuracy. Where accessible, the wall thickness of a brass instrument can be measured with calipers. Otherwise there is little recourse to anything other than ultrasonic apparatus. It is generally easy to obtain data describing the configuration of toneholes on the exterior of a woodwind instrument. The configuration of the toneholes on the surface of the bore, as well as the shapes of the tonehole cavities themselves are considerably more difficult to measure: despite the importance of these data, they are commonly excluded from even the most detailed lists of measurements.

The valve system of a brass can usually be measured with conventional mechanical techniques.

4.4.2. Keyboard Instruments

The measurement of a keyboard instrument will of necessity be restricted to a small number of easily accessible dimensions. No special tools are required for this type of work, which may therefore be done with due reference to section 3 above.

4.4.3. Bowed and Plucked String Instruments

The dial gauges, micrometers and calipers used in the measurement of soundboard thicknesses are analogous to wind instrument measuring tools and must be used with great care. A measuring device should not be slid from point to point, but the contact must be released, the tool moved to a new spot, and brought into contact again. Great care must be exercised around soundholes, roses and other fragile parts. Strings and bowhairs should only be slackened under supervision, and tied frets should not be adjusted.

5. Playing

5.1. General Remarks

The same general principles of handling and measuring also apply to playing. Instruments from public collections should not be allowed to be played for motives of idle curiosity or individual pleasure; nor should they be considered as practice instruments. The use of any museum instrument is connected with a clear risk of mechanical damage. The stresses generated by tuning a stringed instrument or those caused by introducing moist air into a wind instrument cannot be calculated in advance, and may easily be more than the instrument can withstand. It is easy to abstain from bringing a stringed instrument up to working pitch, thus avoiding potentially dangerous situations. There is no similar buffer against damage caused by blowing into a wind instrument. In the situation where it has been decided that the potential gain from playing clearly

justifies this danger, it is wise to make a high quality recording of the entire procedure. This type of documentation is of great value, and may be used to satisfy future requests for information about the sound of a particular instrument. Instruments should not be played without supervision and players should not be allowed to make adjustments of any kind.

5.2. Specific requirements for the examination of the tonal qualities of some major instrument types.

5.2.1. Wind Instruments

The introduction of moist breath into wind instruments can cause wood or ivory to crack due to dimensional change and may initiate corrosion in metals. The instrument should be warmed towards body temperature prior to playing. The length of the playing period should be limited and not permitted to extend to the point where visible condensation of water appears on the bore. Should moisture accumulate on the surface of a metal bore, it should be removed in a stream of warm air. In the case of woodwind instruments absorbent devices are used for drying, despite the fact that they abrade the surface of the bore; extensive use of such devices should not be permitted. Drying is to be regarded as a skilled operation to be carried out by or under the supervision of museum staff.

5.2.2. Keyboard Instruments

Tuning even individual strings should only be done by museum personnel. The destructive effects of wear on such original components as plectra, leather hammer coverings etc. should be taken into consideration when an instrument is to be played.

5.2.3. Plucked and Bowed Stringed Instruments

The instrument can be damaged if it is incorrectly strung or brought to too high a pitch. In instruments considered to be fragile, the length of time that a string is under playing tension should be strictly limited.

Players should use a piece of leather to protect the instrument from rubbing against clothing and from unnecessary contact with bare skin; playing aids (such as chin-rests) should only be used where they are historically correct. They should be mounted by museum personnel or under their supervision.

6. Additional comments

6.1. Dissemination of Information

It is the curator's responsibility to encourage the dissemination of information on the museum's holdings. The more specific information available on the museum's musical instruments, the less will be the demand for access to the original instruments. Any agreement about the right to use material produced by a museum visitor should be examined in terms of the copyright and other laws of the country in which the museum is located. Copyright laws, in particular, may vary widely and general guidelines cannot be given. Unless a specific agreement has been made, the museum may have no copyright protection for documentary material in its custody. A suggested agreement form is appended to these recommendations. A suitably modified version of this document should be signed prior to the commencement of any visit. It is generally preferable for the museum to provide photographic services rather than allowing the visitor to take other than casual photographs. The question of copyright for photographic material can thereby be avoided.

6.2. Reproduction of Instruments

The museum should require that reproductions of instruments in its holdings be labeled honestly with regard to the degree of compromise in their design. The 'exact copy' can never exist. Terminology such as 'based on ...', 'patterned after ...' is to be preferred. The use of reproductions of earlier makers' stamps and labels should be categorically rejected. The museum cannot enforce any specific usage, but it is to the benefit of all if individual instrument makers can be encouraged to adhere to an ethical system of labeling their products.

6.3. Performance Use

Any performance use of an instrument should be designed to reach as wide an audience as possible. Recordings and broadcasts are, therefore, generally more to be encouraged than are concerts alone. In all such situation the museum must not relinquish any part of its responsibility for the instrument to those making the performance arrangements. Instruments which have been restored are, by virtue of that fact, more liable to mechanical damage than are instruments that cannot be used. Such restored instruments also remain sensitive to climatic conditions and mechanical strain, and should be treated with the same care as any other museum object. Particular care should be taken to avoid subjecting the instrument to sudden changes in humidity when moving it between different rooms. Also, the heating effect of stage lighting can cause problems and must be dealt with carefully.

Agreement form

I have read the Recommendations for Regulating the Access to Musical Instruments in Public Collections and agree to follow both the regulations therein and the following specific terms:

1. All notes, drawings, photographs, etc. are made solely for personal use.
2. Copies of all material will be submitted to the museum where it will be added to the documentary record of the object and used by the museum in the same manner as all other material in this file, with due credit to the author.
3. All measuring tools and examination procedures are subject to the approval of the museum staff.
4. If the terms of this agreement are violated, for example by unauthorized commercial use of documentary material, further direct access to the collections may be denied.

Date:

Signature:

