

Some Proposed
Principles of Piano Conservation

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I. Preamble

Pianos that are attributed with extraordinary aesthetic, artistic, documentary, historic, scientific, or social significance are a cultural heritage and constitute a material patrimony to be passed on to future generations. Regardless of their age, it is the nature of such instruments to be both historic and artistic. Each part of this dual nature places conditions on our right to enjoy the heritage, and our obligation to preserve it for the future.

As a cultural resource, historic pianos are invaluable, endangered, and non-renewable. These proposed *Principles of Piano Conservation* recommend a preservation-minded approach to care and restoration that saves not only utilitarian and aesthetic qualities, but also the historical narrative encoded within a piano's physical substance.

Forming the basis of this document are broadly-accepted principles of historic preservation as articulated in the principal international charters and conventions. The Guidelines are provided for use by technicians, restorers, owners, and all with responsibility for the stewardship of historic pianos. The document should be considered in its entirety, as many of the articles are interdependent.

II. Definitions

A. *Conservation*

All actions intended to preserve cultural property for the future. Conservation activities include examination, documentation, treatment, and preventive care.

1. *Examination*

Investigation of structure, materials, relevant history and condition, including the extent and causes of deterioration, alteration, and loss.

2. *Documentation* (See also sections C1-C5 below)

The recording in a permanent format of information derived from conservation activities. Where applicable, documentation records condition before and after treatment, treatment proposals, treatment reports (changes to the instrument due to conservation activities along with the justification for those changes), recommendations for subsequent care, and relevant correspondence. Records may also include information revealed during examination or other conservation activities that assists in the understanding of the piano.

3. *Treatment*

All interventions carried out on the piano with the aim of retarding further deterioration or aiding restoration. Treatment may take one or more forms including stabilization, maintenance, restoration, and reconstruction:

a) *Stabilization Conservation*

Interventions intended to slow deterioration.

b) *Maintenance*

Regular procedures required to sustain preservation and appropriate use, such as tuning, regulating, or lubricating.

c) *Restorative Conservation*

All direct actions intended to return a piano to a known or assumed past state. The aim of restoration is to reveal the culturally significant qualities of a piano, and is based on respect for the remaining historical evidence, and on clear indications of an earlier state.

d) *Reconstruction*

Reconstruction serves to replace lost portions of a piano that are essential to the understanding of the instrument. Reconstruction may be undertaken when documentary or physical evidence survive and conjecture is minimal. To avoid a false sense of history, conjectural reconstruction should be minimal and measures should be taken to avoid deception about the origins of the reconstructed components.

4. *Preventive Conservation*

All actions taken to slow deterioration and prevent damage through control of environmental conditions; pest management; improper moving or handling, and control of access.

B. *Cultural Significance*

Pianos are worthy of preservation in both form and substance when they have been judged to have extraordinary musical, artistic, historic, or social significance. All forms of significance may also be represented by the term *historic*.

C. *Preservation*

The protection of pianos through activities that prevent damage or loss of informational content and retard deterioration. The primary goal of preservation is to prolong the existence of pianos in an unchanging state. Preservation involves management of the environment and of the conditions of use, and may include treatment in order to maintain an instrument, as nearly as possible, in stable condition.

D. *Alteration*

All changes to a piano's substance wrought by intervention are alteration. Alterations are of two types: interventions that deviate from the piano's original form and those intended to restore form to a past state. Since both types of intervention potentially affect the content and clarity of evidence in the instrument, conservation procedures provide protection of historical integrity through safeguards detailed in the following Articles.

III. Articles

A. Alterations

1. Past Alterations

Past alterations may bear witness to a significant historical period and be worthy of preservation. Removal of past alterations requires judgment as to their relative significance. Return to a state of complete stylistic unity sacrifices the evolved state and the associated evidence of subsequent history, and is rarely appropriate.

2. New Alterations

Interventions should not modify the known aesthetic and physical characteristics of the piano, especially by removing or obscuring historic material. Modernizations should be strongly avoided. When the removal of historic materials cannot be avoided, the affected components should first be documented in their pre-restoration state. Where relevant, material removed from an instrument should be retained as part of the piano's historical narrative.

B. Treatment

1. Treatment Planning

The conservation needs of historic pianos should be based on adequate study of archival sources, detailed physical examinations, and collaboration with stakeholders. Treatment proposals detailing interventions facilitate collaboration between technicians and conservation specialists.

2. Minimum Intervention

- Restoration potentially risks erosion or loss of historical evidence. Therefore, the most appropriate action in a particular case is one which attains the minimum requirement with the least intervention; treatments should change as much as necessary but as little as possible.
- Signs of age are evidence of historic use and testimony of the piano's passage through time. They should be retained whenever

possible. It is often sufficient, for example, to treat the more distracting scars locally to avoid wholesale refinishing.

- Restorative conservation should not stop short of making the instrument durable enough to fulfill its function for a reasonable interval before the next restoration.
- Treatments should be targeted wherever possible. Unnecessarily thorough restoration threatens historical evidence and should be avoided.
- In the extraordinary event that material evidence is so rare and important that any loss should not be tolerated, it may be appropriate to recommend against any restoration or use.

3. Reversibility

Restoration is inescapably interpretive, and therefore fallible and subject to future judgment. Whether literally possible or not, reversibility remains a useful goal in all intervention. Whenever possible, treatments should be additive rather than subtractive.

4. Making Interventions Detectable

Restoration and reconstruction may imitate period work, but it is imperative that imitative work be detectable on close inspection, as well as through treatment documentation. Deceptive imitation otherwise falsifies the historic piano as an authoritative record of period piano building.

5. Correcting Historical Work

Although historical design, materials, or workmanship may sometimes fail the current restorer's standards of quality, they nevertheless give authoritative testimony of past makers' knowledge, skill, or judgment, and deserve respect as historical evidence. Every effort should be made to retain such work.

6. Conservation Methods and Materials

Traditional methods and materials are preferred except when non-traditional alternatives better serve preservation goals (ex. reversibility), without adversely affecting appearance or function. The advantages of treatment materials and methods must be balanced against their potential adverse effects on future examination, scientific investigation, treatment, and function. Materials newly derived from endangered species should not be used in treatment.

7. Recycling Historic Components

Using parts from one historic piano in the treatment of another potentially creates a falsification that can mislead future forensic examination and is to be avoided, even when the components are made by the same maker in the same period. However, in the event that such practice is deemed necessary, it is imperative that the true origins of transplanted parts be documented and indelibly labeled where future investigators will notice.

8. Removed Materials

Components and fragments that must be removed should be labeled and given archival storage whenever possible to preserve historic

evidence. Storage inside the piano itself may be appropriate when space is sufficient and there are no adverse effects on the piano.

9. Collaboration

As artifacts, historic pianos are complex and diverse in materials and design. No individual can be expert in every aspect of the instruments and in the specialized discipline of conservation. It is therefore generally desirable that treatment planning involve collaboration with colleagues and allied professionals having potential to contribute. Interdisciplinary collaboration compensates for blind spots and provides checks and balances to safeguard against conflicts of interest.

C. Documentation

Documentation exists in two types: *Description* and *Conservation*. Although both are highly important in the overall preservation of pianos, Conservation Documentation is the first obligation in all intervention.

1. *Conservation Documentation*

Inasmuch as culturally significant pianos bear physical evidence of their origins and subsequent history, restoration necessarily overlays present interpretations and workmanship upon the historical record itself. It is therefore incumbent on restorers to preserve a piano's informational integrity by recording in writing and through photographs the extent, location, and nature of interventions. Conservation documentation is typically generated in three phases.

a. *Examination (or Condition) Report*

This is an assessment of condition on a section by section level. Examination reports identify and diagnose condition issues, including the materials involved, and the location and extent of deterioration, past alterations, and loss.

b. *Treatment Proposal*

The treatment proposal details the objectives of the treatment and the measures proposed for each condition issue. When appropriate, multiple treatment alternatives may be provided. The primary use of the proposal is to facilitate planning and communication between practitioners, owners, advisors, and other collaborators. The treatment proposal must always be subject to change, as new information is likely to emerge during the treatment phase.

c. *Treatment Report*

The restorer should keep detailed records of the treatments applied during the intervention. Such documentation permits future investigators to identify the specific restorative alterations that were made, the areas affected, and the materials added or removed. Usually based upon the treatment proposal, a treatment report records all details of the actual treatment, some of which will not have been possible to predict in the proposal. The report also includes condition issues revealed during the course of treatment and not represented in the proposal. The treatment report should include preventive conservation recommendations,

such as maintenance procedures, recommended environmental conditions, and special handling considerations.

2. *Descriptive Documentation*

This form of recording creates a picture of a piano that may be superficial, or detailed. Such documentation typically informs comparative studies or future restorations of similar instruments. In the event of catastrophic loss of a piano, descriptive documentation constitutes a form of virtual preservation, and is therefore particularly important for the rarest instruments. Descriptive documentation consists of layout, measurements, materials identification, technical specifications, markings, decoration, and other construction and tonal details. Most descriptive documentation can be recorded independent of restorative conservation, although some details are only revealed during disassembly.

3. *Preservation of Documentation*

Conservation documentation is an invaluable part of the history of the historic piano and should be produced and maintained in as permanent a manner as is practical. Paper documentation is recommended, as short-lived electronic-based media cannot be considered archival in most cases.

4. *Distribution of Documentation*

Copies of examination and treatment records should be given to the owner or authorized agent, who should be advised of the importance of these materials. Consider storing a copy of the documents, or summaries in small type, if necessary, inside the piano itself.

5. *Judgment in Documentation*

Careful judgment is required in deciding the thoroughness of documentation, but under no circumstances should practitioners fail to record interventions.

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October, 2014