



TESORERÍA
GENERAL
ORDENES
DE PAGO
DE DISTRI-
TOS
1929

PAGOS
POCHUCA
1933

Versión en INGLÉS 

Impact of the International Course on Paper Conservation in Latin America: Meeting East, on the staff training in the project Rescate del Archivo Histórico de Oaxaca staff. Reflections in retrospect

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Abstract

As a result of a project to recover historical archives within the country, it was deemed necessary to train staff hired without prior knowledge or experience in this type of work, to have technicians in conservation who could provide long-term continuity to the work of document preservation. The project lasted six years, which gave a wide temporary margin to train both in the introductory aspects of cultural heritage awareness, as well as in advanced aspects of conservation, especially to open up the possibility to share and put into practice on a large scale the knowledge obtained in the International Course on Paper Conservation in Latin America: Meeting East of which the author attended in 2013 while being the coordinator of the project. Thanks to a collaboration between public and private initiatives, after six years the archive established its own identity, thus providing continuity to the work while ensuring a definitive hiring model for the staff, the investment of time in training, and the experience acquired over the years have been able to bear fruit.

Keywords

Archive; historical documents; conservation; restoration; adhesives; starch; lining; reagent; Japanese conservation technique; Oaxaca.



Background

The problem of documentary collections within the country is complex and, in many cases, discouraging. In Mexico, we have priceless collections that keep diverse testimonies of early colonial times as well as written evidence of the configuration and evolution of our nation until it became what it is today. However, most of these archives are in precarious conditions of storage and maintenance. There are quite a few professional conservators and document conservators, and the possibilities of training and updating those responsible for their safekeeping have historically been scarce as well. On the other hand, conservators and archivists, in general, face a common situation: we managed the resources and put the archive in good condition, yet years later, it is reverted to its original condition due to a lack of follow-up and training of the staff in charge.

From 2011 to 2017 in Oaxaca City, the Restoration project of the Executive Power of Oaxaca Historical Archive—in which I had the opportunity to coordinate as conservator—was carried out. The project's goal was to recuperate historical documentation that is part of the archive while classifying it to generate an inventory. The project was guided by the interest in making the documentation available for consultation, that is, to create an archive that would facilitate physical access to the document for researchers. Furthermore, another goal was to train to continue with the work of safeguarding the documentation after restoring it with a pragmatic approach that understands the preservation of a collection not as an extraordinary situation, but as a constant task that depends on persistence to be accomplished.



Figure 1. Training of the Rescate AGPEEO project staff. Image: ©Fernanda Blázquez Blázquez, 2013.

Being aware that the work of preserving a collection is a lifetime project—a project of many lifetimes—the relevance of an approach that breaks to a large extent with the training schemes of the conservator-restorer within the school environment was proposed in Oaxaca, and it yielded positive results as seen hereunder.



Methodology and initial training

The operative staff that developed the project was made up of 20 people from Oaxaca City, whose ages ranged from 18 to 30 years old with a few exceptions above that range. In terms of education, they had completed high school; it is important to note that none of them had experience in the conservation field. In short, they were people who came with the legitimate interest of having a source of income and who, as will be seen, also found a professional field and a vocation.

The project began with 160 hours of theoretical and practical training by three conservators who graduated from different generations of the bachelor's degree in Cultural Property Conservation of the Instituto Nacional de Antropología e Historia¹ (INAH)'s Escuela Nacional de Conservación, Restauración y Museografía² (ENCRyM). Coming from a common background, in an almost natural way, the pedagogical model of that school was retaken in terms of the integral approach to the object, which sought to sensitize and expand the team's knowledge about documents as cultural property, with historical, aesthetic, and technological values, using digital presentations as support for theoretical classes.

To get into the subject of conservation, stabilization, and restoration, we sought to replicate the model of the Paper Conservation Studio Seminar of the school previously mentioned, both in the order of introduction of the topics and in the proposal for the elaboration of test, understood as modern materials in which manufacture and damages are recreated or similar to the historic documents, in order to become familiar with the properties of the materials and their treatment.



Figure 2. Teamwork. Lining a large scale document.
Image: ©Fernanda Blázquez Blásquez, 2013.

¹ National Institute of Anthropology and History (note from the translator).

² National School of Conservation, Restoration and Museography (ENCRyM) (note from the translator).

After that first training, we began to work on the mechanical cleaning of 19th and 20th-century documents, specifically cleaning with a brush, eraser, rubber powder, and scalpel. We decided to begin with the documentation of that period because it is the most abundant in the archive and, from an archival perspective, it posed fewer challenges for its organization, since most of them correspond to handwritten or typescript documents that do not require resources such as paleography for their identification and arrangement. In this regard, as conservators we had to adapt to the requirements of the project, even knowing that the treatment of modern material implies greater problems than older material, due to the lower quality of the raw material and the characteristics of the nineteenth-century manufacturing processes that, under adverse storage conditions, causes fragility and oxidation of the paper, as well as ink bleeding.

The next challenge the team faced was the presence of microorganisms and the wide range of deterioration associated with them. This situation led the training to urgently focus on all aspects to be considered when dealing with documentation with this kind of biodeterioration. A security approach was promoted both for the document and for those responsible for handling it, behavior protocols were developed within contaminated areas that everyone had to follow as a mandatory work requirement, and time was also invested in information and awareness-raising on the subject through talks with invited specialists and the project coordinator herself. At the same time, we carried out subprojects to identify microorganisms and test their effectiveness with different fungicides; the conclusions obtained from these were shared with the group and helped us to better define what we had and to ensure the efficacy of our procedures.



Figure 3. Application of Klucel® G reactivated strips. Teamwork. Lining a large scale document.
Image: ©Fidel Liévana.

The set pace of work was intense and constant due to the amount of material in the archive, as well as other instances through which the documentation had to pass to be properly classified, stored, and catalogued.



The impact of the Japanese paper conservation technique on the Western version of the technique

The first two years of the project were used to learn about the collection and advance in its cleaning and disinfection, while the staff gained confidence in their knowledge and performance. In addition, strategies to make each task more efficient were implemented, for example, using job rotation from time to time to avoid the monotony of repetitive actions, which improves productivity and reduces the physical wear and tear involved in this type of activity. During that time, training continued through presentation with specific topics, but, above all, through the direct experience of treatment of documents that provided the material to show specific cases of deterioration and their resolution.

By the end of the second year, there was a clear need to restore a large volume of documentation—beyond just stabilization—to provide documents suitable for consultation. While the previously mentioned training exercises were carried out for all staff to practice tear repairs and infills with Japanese paper on specially made tests, in the daily handling of the documents during cleaning and disinfection, those with greater manual skills focused on the conservation tasks.

This need to conserve damaged documents coincided with the opportunity to participate in the International Course on Paper Conservation in Latin América: Meeting East which took place in November 2013 and of which I was a scholarship holder. Thus, in December of that year, the knowledge acquired was replicated, transmitted to the staff, and putting it into practice.

The experience of the course marked definitive changes and guidelines in the way of conserving, which had direct repercussions on the work of the following four years. It also provided a very clear ethical framework taken from the Japanese work ethic and the tools that we fellow scholarship holders acquired—all of this became part of the knowledge that the staff obtained.

The following is a detailed review of the most important topics in terms of their application following the requirements of document preservation.

There was an abundance of documents in which it was necessary to provide secondary support to the original support, that is, a lining was required. The cases can be summarized in three types of loose-leaf documents from the end of the 18th century to the first half of the 19th century:

1. Documents with a high degree of disintegration and friability due to fungal action in which legible information is preserved, usually loose-leaf in letter and legal sizes. These were the most abundant case.
2. Charts containing a wide variety of information, in letter, legal and tabloid size which, as part of their manufacture, they were traced with iron gall ink that, when carbonized, regularly fragmented the sheet in such a way that a puzzle of rectangles and squares was created.
3. Documents with cavities made by insects that fragmented the document require more than individual tear repairs for saving time and achieving better results. This was the least frequent case.



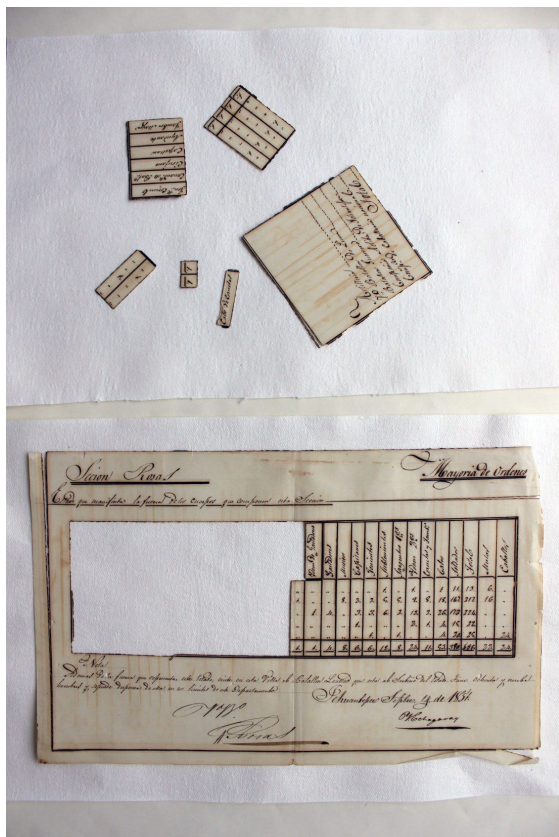


Figure 4. Chart before lining.
Image: ©Fernanda Blázquez Blásquez, 2013.

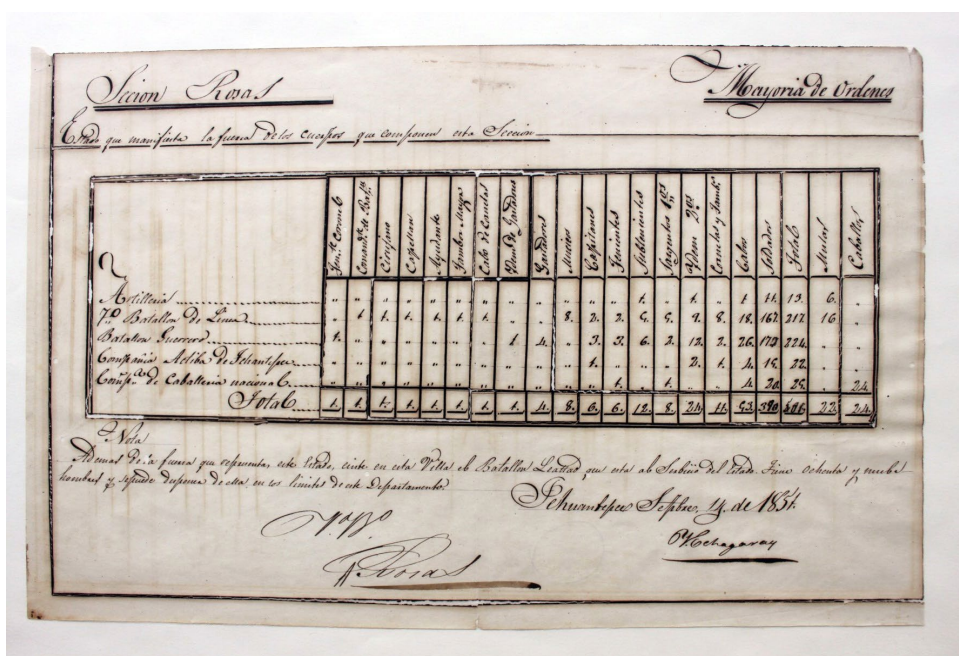


Figure 5. Chart after lining. Imagen: ©Fernanda Blázquez Blásquez, 2013.



In the cases described above, the Japanese lining technique adapted to the needs of Western documents was applied. This technique requires the use of wheat starch paste even in cases in which the material has been affected by microorganisms. For that purpose, it is essential to achieve complete cooking of the wheat starch and to follow a very specific process to obtain the best adhesive effect of this material. The correct preparation of wheat starch paste also allows it to be stored for a long time at room temperature without losing its adherent qualities. It is essential to sift and knead it beforehand, as well as its subsequent dilution in water to use it in liquid consistency.

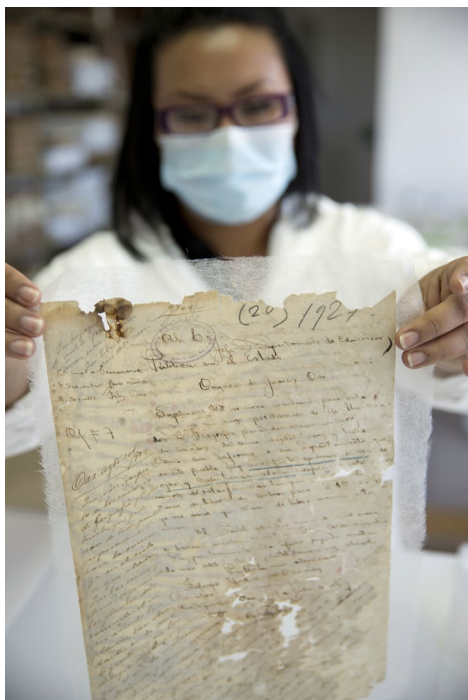


Figure 6. Lining document.
Image: ©Fernanda Blázquez Blásquez, 2013.

This way of preparation differs from the one learned by several generations in the Paper Conservation Studio Seminar in the ENCRyM, so, after the presentations of Dr. Masato Kato on the physical and chemical qualities of the starch paste and the elaboration and application practices carried out within the mentioned course, it was imminent to correct the technique taught to the team and implement the Japanese recipes. Consequently, excellent results were achieved concerning the adhesiveness obtained, which provides a good level of adhesion while facilitating the lace detached and avoiding curling of the lining document—which is a consequence of using an adhesive that is too concentrated. Advantages were also achieved in terms of its use, since, as it is used in a highly diluted form, the savings are considerable. Moreover, we had the opportunity to follow up on the intervened material in subsequent years without finding microorganisms regrowth or separation of the secondary support.

Another common deterioration problem was the decrease of rag pulp and the increase of wood pulps in the second half of the 19th century and the first half of the 20th-century material. Inadequate storage and careless handling resulted in broken and curled edges. In these cases, it was necessary to flatten the edges and strengthen them and, in many cases, it was necessary

to reinforce the most pronounced tears from the outer edge to the inside of the sheet. For this type of industrial paper, mostly glazed paper with advanced yellowing, it is difficult to apply a reinforcement without leaving traces. The use of defibrated edges is not recommended because it leaves an untidy finish, the choice of adhesive is also problematic because too much humectation generates differential growth and therefore deformation and risk of new breaks. Moreover, we invested a lot of time in the treatment of this kind of documents, since almost all the 19th-century material was stored in bundles tied with tape between two cartons, so the four edges of the documents had been jeopardized, especially by the tie points of the tape.

An efficient solution was also learned from the International Course on Paper Conservation in Latin America: Meeting East: how to make adhesive strips of Japanese paper pre-coated with Klucel® G to be reactivated with alcohol. In brief, this technique is based on preparing a film of cellulose ether on a Mylar® and adhering over it to a Japanese paper of the desired grammage, in this case, 5g *tengucho* was used. After drying, it is possible to peel off the paper with the adhesive film and cut strips of the required thickness. A strip is cut to the length of the tear and placed over it, the adhesive is activated by applying alcohol with a brush, then left to dry under weight. This procedure saved a great deal of time, as the pre-cut strips significantly speeded up the work. A great visual integration was achieved since a very thin paper was used and, by applying ethanol as a reactive substance, drying is relatively fast without causing deformations, and even without ink bleeding in the cases of lined formats that were commonly intervened using this technique and that presented this problem when the adhesive was applied directly with the brush.

Although there are many other technical issues on which the course focused, I consider it of greater importance to use this space to highlight two last issues. The first one is the establishment of communication and collaboration networks created from the interaction between Latin American conservators, which have resulted in knowledge and exchange. The second one—which had already been introduced a few paragraphs above—is the Japanese’s approach to work, which, in short, is part of their idiosyncrasy and is precisely an aspect that is lacking in Mexican culture, so this approach was very useful in forming individuals as conservators. This experience that provided a guiding model, while coinciding with the values of the heritage conservator in general, emphasizes a posture of commitment and respect for the cultural property and—very importantly—for the materials and working tools, which may be expensive and difficult to acquire. In this way, the principle of order and cleanliness of the spaces was reinforced, from the care of the individual workstation to the common areas, with which joint actions have been promoted to maintain the area in good condition and appearance—regardless of whether there was a janitor or not—as well as the care of all the tools and the proper washing and drying of the Japanese brushes—which are expensive and elementary tools—to achieve the expected results in the lining.

The end of one project and the beginning of another

According to the intervention reports produced each month, the number of documents restored at the end of the project totaled 191 103 sheets of 13 390 files, equivalent to 9 771 AG12 boxes. The purpose of pointing out the figures is to measure the number of intervention cases we faced and, concerning this, the level of practice and experience that led to a significant technical mastery on the part of the staff that carried out the stabilization and restoration of the documents. Those who were committed to their learning and to assuming greater responsibility within the project, over time served as trainers and mentors—which strengthened them in another area—for the new teammates who eventually joined.





Figure 7. The lining process of the drawing of a weapon, *corpus delicti*, was filed in the 18th century Fondo Justicia. Image: ©Fernanda Blázquez Blázquez.



Figure 8. End of the lining of the drawing of a weapon, *corpus delicti*, file in the 18th century Fondo Justicia. Image: ©Fernanda Blázquez Blázquez.



Figure 9. A picture of the AHEO. Image: ©Fernanda Blázquez Blázquez, 2017.

In 2017, the government agency Archivo Histórico del Estado de Oaxaca (AHEO)³ was recognized as a judicial person and was provided with a building that was constructed while the restoration was being performed. We transferred about three linear kilometers of historical documentation to the new headquarters, a little more than a half (1.6 km) of those documents had already undergone stabilization and restoration processes. Along with the documents, the staff also moved to their place in the institution.

The operative team trained between 2011 and 2017 moved to the Departamento de Conservación del AHEO assuming positions in a new organizational chart in which four chiefs were configured: Stabilization, Paper Conservation, Photo Conservation, and Book Conservation. In the first stage, the studios were equipped and the challenge of getting them up and running began. At the end of that year, I left the project with the certainty of having done my work.

By 2022, there are still eight people from the original team working in the archive, who still perform direct document intervention functions: four of them in middle management positions as heads of the Paper Conservation, Photo Conservation, and Book Conservation areas, and one more person—as planned and as she should be—as head of the Conservation Department, an Oaxacan woman in charge of the conservation of her documentary heritage—which personally fills me with pride. It is meaningful that these people are growing professionally in positions of authority

³ Oaxaca State Historical Archive (note from the translator).



because it means that the resolution of conservation problems in general, the decision making about treatments, as well as the training of the staff that has been incorporated afterward has been their responsibility, therefore, the knowledge and experience gained during the project have been decisive in the new stage that is a promising future for the archive.

As for the people who left the institution, two of them continue to work as private bookbinders and occasionally perform paper conservation work, another one is responsible for a governmental bookbinding studio that has historical and modern material, and another one works for a well-known foundation attends to the conservation requests of municipal and parochial archives in the state of Oaxaca. This gives a total of 12 people out of the 20 who participated in the project who continue to be involved in the documentary heritage conservation in their region, which is undoubtedly encouraging and proves that the training scheme developed was functional.

Although ideally, professional conservators should manage document collections, the richness and diversity of archives and libraries in our country—like many others in Latin America—surpasses the number of graduates from the schools that train us. Therefore, I consider that the results of this project have been very positive, and, within it, the knowledge transmitted through the Paper Conservation in Latin America: Meeting East.

Likewise, I deem it indispensable to create opportunities for the integration of the people I have mentioned, who, without holding any professional degree, have achieved a competent training and assumed the commitment to safeguard their local heritage, and therefore, they need access to the academic circles to continue training, discussing, and updating their knowledge.

I finish writing this brief article on January 27th Conservator's International Day, so I extend my sincere congratulations to my colleagues from Oaxaca who, in 2021, celebrated 10 years of having assumed their vocation as documentary conservators.

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