

Casa de Oswaldo Cruz

Preservation and Management Policy for Cultural Collections in Science and Health



Principles, guidelines, and orientations that govern management and preservation actions applicable to the cultural collections in science and health under the custodianship of the Casa de Oswaldo Cruz (COC). Specifies the collections to which the policy applies, defines goals, and stipulates responsibilities for the collections.

CASA DE OSWALDO CRUZ

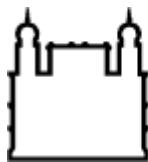
Preservation and Management Policy for Cultural Collections in Science and Health

Política de Preservação e Gestão de Acervos Culturais das Ciências e da Saúde

Política de preservación y gestión de acervos culturales de las ciencias y de la salud

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Ministério da Saúde

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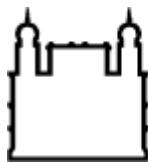
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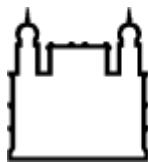
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Introduction

Since its creation in 1985, the [**Casa de Oswaldo Cruz**](#) (COC) has dedicated itself to producing knowledge through research in the field of the history of science and health as well as to overseeing the preservation, valorization, and dissemination of the [**architectural, urban, archeological; archival; bibliographic; and museological**](#) heritage that has been amassed by the Oswaldo Cruz Foundation (Fiocruz) since its early twentieth-century establishment on the grounds of the Manguinhos Fazenda in Rio de Janeiro, originally as the Federal Serum Therapy Institute (Instituto Soroterápico Federal).

The present Preservation and Management Policy for Cultural Collections in Science and Health is a reflection of the COC [**mission**](#) and of its accumulated experience and matured understanding of pertinent work processes and management and planning tools. The policy is in tune with national and international concepts and practices that advocate preventive conservation, risk management, integrated conservation, and sustainable preservation as key principles and that also hold research and education as fundamental and strategic to the construction of preservation policies. The policy recognizes that its implementation is vitally dependent on financial planning and on the definition of those who will be responsible for its enforcement.

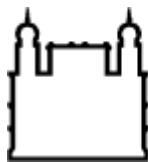
The Preservation and Management Policy for Cultural Collections in Science and Health recognizes the broad concept of cultural heritage that is manifested in the diversity of collection typologies for which the COC is responsible and which offer sources on scientific information, institutional memory, and the history of health and science in Brazil. The policy advocates integrated archive management, establishes general guidelines for medium- and long-term programs and actions, defines responsibilities, and makes provisions for revision and updating.

The Preservation and Management Policy for Cultural Collections in Science and Health is consonant with the COC's and Fiocruz's strategic goals as laid out in the [**COC Four-year Plan**](#) and the [**Fiocruz Four-year Plan**](#) for 2011-2014.

The COC's Technical Chamber on Information and Documentation and its Sub-Chamber on Cultural Heritage initiated work on the drafting of this policy; it was further developed by a working group appointed by COC management, which drew representatives from the areas responsible for the preservation of cultural collections. Its design was a collective effort that enjoyed the collaboration of a number of organizational units within the COC and of ad hoc external consultants as well, who evaluated the policy and provided prior validation. It was submitted to the COC's Deliberative Council, which approved it on March 20, 2013.

The drafting of the policy took into account the various ways in which each collection typology has been organized within the COC and how the institute's preservation and management concepts, techniques, and methods have developed over time. This information was relevant because all of these approaches originated at different points in time and were put in place by different organizational structures, as a result of the singular characteristics of the COC. It was therefore necessary to reach a consensus about conceptual definitions that had been sourced from standards of practice established by different fields in the preservation of cultural assets; furthermore, these definitions had to reflect the specific reality of the COC.

The present document consists of two main sections, followed by a section containing two attachments. The first section lays out operational definitions, the goals and typologies of the collections subject to the policy, the general principles and guidelines that will orient future actions, and, lastly, the departments and services that will be responsible for enforcing and revising the



policy. The second section presents the specific policies applicable to the types of collections under the COC's responsibility: Preservation and Management Policy for the Architectural, Urban, and Archeological Collection; Preservation and Management Policy for the Archival Collection; Preservation and Management Policy for the Bibliographic Collection; and Preservation and Management Policy for the Museological Collection. The texts have been organized to succinctly describe the collections to which they refer, to present goals, guidelines, and specific standards, to describe associated programs, and, lastly, to indicate responsible parties. The third section contains two attachments. [Attachment I](#) lists specific programs and plans for the policies presented in the second section, which will be developed and made available at a later time. [Attachment II](#) indicates the general and specific standards for preservation of the various collections.

Definitions

For the purpose of this policy, the following operational definitions apply:

Collection: An assemblage of assets that make up the heritage of an individual, institution, or nation, grouped by assigned value, in accordance with its cultural nature, and following an organizational logic.

Preservation: Measures and actions defined with the purpose of safeguarding cultural assets and ensuring their integrity and accessibility for present and future generations. This includes identification, cataloguing, description, dissemination, conservation, and restoration.

Conservation: Direct actions involving cultural assets with the purpose of interrupting or delaying processes of deterioration.

Restoration: Direct actions involving assets that have lost part of their meaning or function due to deterioration and/or previous intervention, with the purpose of allowing them to be appreciated, used, and enjoyed. Such actions should be exceptional in nature and based on respect for pre-existing material.

Policy: A set of intentions, principles, and goals that lays the foundation for planning and actions.

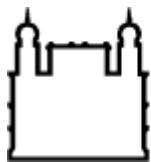
Program: An outline of activities meant to reach certain policy goals and objectives.

Plan: A set of methods, activities, tasks, actions, and measures by means of which a program's goals and objectives can be reached.

Management: A set of tasks that endeavors to guarantee the efficiency of work processes and the efficacious allocation of all resources made available by an organization in order to achieve pre-defined goals for preserving collections.

Purpose

The present policy sets out general principles, guidelines, and responsibilities and provides guidance in the development of specific policies, programs, plans, and procedures that are aimed at the preservation of the cultural collections in science and health under the custodianship of the Casa de Oswaldo Cruz.



Principles

This policy holds that representations of a group's memory and identities should be preserved and accessible to current and future generations, as witnesses to the human action that produced them, as objects of reflection, and as research sources. The policy is based on current theory and practice in the area of cultural heritage and it recognizes historic, artistic, and cognitive values in its direct relations with these collections. In its relationship with society, it embraces other values as well, such as commitment to future generations and to the local public, full citizenship, solidarity, respect for ethnic and sociocultural diversity, socio-environmental commitment, the democratization of knowledge, education as an emancipatory process, and ethics and transparency. With this in mind, the policy has been built upon the concepts of preventive conservation, risk management, integrated conservation, sustainable preservation, research and development in collection preservation, and heritage education, as defined below:

Preventive conservation: A set of measures and actions that has been defined in a multidisciplinary fashion with the goal of avoiding and minimizing the deterioration of cultural assets and the loss of their value. These measures are primarily indirect rather than interfering with an object's material or structure. They encompass the work of research, documentation, inspection, monitoring, environmental management, storage, programmed conservation, and contingency plans.

Risk management: Risk management offers the field of heritage preservation a technical, scientific methodology that affords an integrated vision of the risks and damages to which cultural assets are subject. It furnishes resources that can be used to optimize decision making in the conservation of cultural heritage. It defines priorities for actions and for the allocation of resources in order to mitigate various types of risks to cultural heritage.

Integrated conservation: Integrated conservation takes society's participation into account and requires access to thorough, objective, and adequate information to support citizens' contributions. It calls for the promotion of methods, techniques, and skills involved in restoration and conservation as well as investments in research and the training of qualified personnel at all levels and from a multidisciplinary perspective.

Sustainable preservation: Sustainable preservation means that preservation methods and techniques must target the efficient use of natural resources and must work to mitigate environmental impact. It valorizes the sociocultural meanings of cultural and natural heritage and links the conservation of its materiality to its character, identities, values, and beliefs as constructed over time. Through revitalization and intervention actions, it fosters citizenship, cultural and ethnic valorization, and local sustainable development.

Research and development in collection preservation: The production of knowledge should inform the definition and ongoing enhancement of collection conservation strategies. It should reflect on preservation practices and the materials contained in collections while likewise keeping abreast of technological innovations. It should rely on strategic planning and ensure that research and development of techniques and methodologies are conducted in an integrated and inter- and multidisciplinary fashion.

Heritage education: Heritage education encompasses structured educational actions relating to cultural collection preservation and the valorization of memory. These actions should be designed in conjunction with other institutional policies and should engage society and actors from the field of cultural heritage in a cooperative, supportive fashion. Heritage education should also allow society to appropriate its own cultural heritage and should strengthen citizens as the historical subjects of the process of producing and preserving this heritage.



Guidelines

The following guidelines should be observed in achieving full implementation of this policy:

Whenever possible, preservation actions should obey the principle of minimum intervention, respecting the object's artistic, historic, scientific, and technical characteristics.

Any changes that come to be made should be identifiable and, whenever possible, reversible.

Curative conservation and restoration actions should only be adopted when preventive measures fail to forestall the damage caused by processes of deterioration.

Preservation actions should be monitored and documented so that the effectiveness, efficiency, and efficacy of adopted solutions can be evaluated; this will also provide support for planning future actions and for communication, dissemination, research, and education.

Processes of collection management should be coordinated in an integrated fashion.

Information management systems should permit the integrated recovery of information from the various collections.

In order to enhance collection preservation and optimize the use of resources, it is important to foster research into preservation techniques and methodologies as well as the formation and training of personnel. An agenda stipulating priority research in the area of cultural heritage preservation in science and health should be defined and should be tied in with graduate teaching at the COC. Mechanisms should be put in place to encourage technical and scientific production.

Structured programs in heritage education should be planned and implemented as a strategy intended to ensure the sustainability of collection preservation.

Educational initiatives in the field of cultural heritage preservation in science and health should guarantee the formation of internal human resources at the Casa de Oswaldo Cruz and Fiocruz, along with the formation of external human resources, through teaching, training, and valorization efforts.

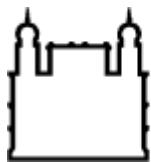
In consonance with skills and needs, the formative content of educational actions should expand knowledge, develop skills, and incorporate attitudes and values associated with the management and sustainable preservation of cultural collections.

Cooperation with institutions responsible for cultural collections in the area of science and health should reflect the COC's solidarity with and commitment to identifying and preserving these collections, especially those in a risk situation.

Engagement in cooperative efforts with Fiocruz departments and services should be encouraged with the purposes of developing integrated collection management and preservation actions and of enhancing the use of resources and of institutional skills.

Engagement in cooperative efforts with public and private Brazilian and foreign institutions, especially those responsible for cultural collections, should be employed as a strategy to facilitate the sharing of information, methods, and techniques, human resource training, and the exchange and loan of collections. This strategy should further foster the development of collection management and preservation actions.

Strategic preservation actions should be evaluated and structured so as to allow for internal and/or external investment plans.



Preservation and Management Programs

The Preservation and Management Policy for Cultural Collections in Science and Health establishes six preservation and management programs common to all collections under its custodianship. These programs involve procedures relating to accession; technical treatment; conservation and restoration; safety; access, loans, and reproduction; and collection dissemination. A brief description of these programs is found in [Attachment I](#). Detailed content and information on program plans and projects will be made available as these are concluded.

Responsibilities

Implementation of the Preservation and Management Policy for Cultural Collections in Science and Health falls to COC departments and services, which are responsible for developing and applying specific programs and plans under the coordination of the Vice-Directorship for Information and Cultural Heritage and with the advisory assistance of the Technical Chamber. COC's Deliberative Council is responsible for approval.

Standards

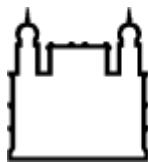
See [Attachment II](#) for pertinent legislation and standards and guidelines applicable to the cultural collections under the responsibility of the Casa de Oswaldo Cruz.

Funding

The Brazilian Treasury is the main source of funds for the Casa de Oswaldo Cruz. Allocated under Brazil's Annual Budget Bill (Lei Orçamentária Annual), these funds are intended to finance actions that will fulfill the guidelines, objectives, and goals set out in the COC Four-year Plan. The Four-year Plan comprises both regular actions essential to fulfillment of the Fiocruz mission as well as strategic actions meant to achieve objectives defined within a determined timeframe. Funding for regular and strategic actions also comes from other sources, mainly bids held by public and private institutions that offer financing, sponsorship, and grants. The preservation of cultural heritage is part of the COC mission, and the Brazilian Treasury is primarily responsible for financing regular actions to this end, as guided by this policy and as defined in the COC Four-year Plan.

Revision

The Preservation and Management Policy for Cultural Collections in Science and Health should be revised and updated every four years, at least, under the guidance of the Vice-Directorship for Information and Cultural Heritage, with the advisory assistance of the Technical Chamber and the participation of COC departments and services; any changes must be approved by the COC's Deliberative Council.



Preservation and Management Policy for the Architectural, Urban, and Archeological Collection

Description

The Casa de Oswaldo Cruz became actively involved in preservation of the architectural, urban, and archeological collection under the management of Fiocruz in 1989. At that time, the COC absorbed the initiatives that had first been introduced and coordinated by the president of Fiocruz subsequent to the 1981 declaration of Fiocruz as a national heritage site by Brazil's Institute of Historic and Artistic Heritage (IPHAN). The COC then established its Department of Historic Heritage, which is responsible for Fiocruz's heritage in the form of buildings.

The collection's initial nucleus consisted of the eclectic-style buildings that were part of the institute's original architectural complex, designed by architect and engineer Luiz Moraes Junior. This collection also included the polygonal-shaped premises on which these buildings stand on the Fiocruz campus in Manguinhos, which is a protection area. Based on historical studies on the formation of this campus – produced by the Department of Historic Heritage team as part of the research line “Process of forming and occupying the Manguinhos campus” (in Port.) – other collections were incorporated. Based on these studies, two modernist buildings were identified on the campus and declared heritage sites in 2001 by Rio de Janeiro's State Institute of Cultural Heritage (Inepac). These constitute the hub of the Manguinhos architectural and historical complex.

Since the first decade of this century, in response to a strategic COC project, the Department has expanded its activities and devoted itself to studies involving the identification of cultural heritage in health and its historical aspects and valorization.

The institute's collection of historic buildings currently covers both the eclectic (1892-1922) and modern (1935-1962) periods. Since 2010, the complex has also comprised historic archeological remains from architectural and engineering structures, along with prehistoric remains lying within Fiocruz's area of management in the state of Rio de Janeiro.

The assets comprising this [architectural, urban, and archeological collection](#) are located on the Fiocruz Manguinhos campus and the Fiocruz Atlantic Rainforest campus, both in the city of Rio de Janeiro, and also on the grounds of the Itaboraí Palace in Petropolis.

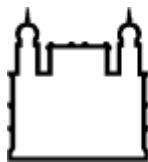
Purpose

This policy defines the guidelines and responsibilities that govern preservation and management actions involving Fiocruz's architectural, urban, and archeological heritage and that are intended to ensure the transmission and appropriation of its specific values (historic, artistic, landscape, and/or ethnological). Furthermore, based on the preservation management programs listed in [Attachment I](#) and pursuant to the legislation and standards applicable to cultural collections listed in [Attachment II](#), this policy provides guidance for the formulation of plans and guidelines for occupying areas of historic and cultural interest on Fiocruz campuses and also for the formulation of conservation plans for preserved buildings.

Guidelines

The Preservation and Management Policy for the Architectural, Urban, and Archeological Collection endorses the [general guidelines](#) and sets out the following specific guidelines for this collection:

Actions to preserve the architectural, urban, and archeological collection should respect the established principles set out in normative documents and should comply with specific legislation



governing the preservation of cultural heritage in order to ensure the maintenance of the set of elements that express the collection's image and make up its materiality.

Strategic maintenance and preventive conservation actions should be guided by plans for each one of the preserved historic buildings and urban spaces.

The uses and occupancy of the preserved buildings and urban spaces should be defined in accordance with master plans and occupancy plans, taking into consideration the institute's needs and the physical characteristics of the property to be preserved.

Actions aimed at the safety, accessibility, and dissemination of the collection should ensure the accessibility and enjoyment of the architectural, urban, and archeological collection, taking into account facility infrastructure and the capacity and load limits of each asset.

Responsibilities

The [**COC Standing Committee on Collections**](#) should define and periodically revise the thematic line(s) that guide the expansion of the architectural, urban, and archeological collection and should evaluate the accession of new assets and pronounce itself on the matter, always in consonance with this document's general and specific guidelines.

The [**Department of Historic Heritage**](#) should implement and oversee enforcement of the preservation and management policy for Fiocruz's architectural, urban, and archeological collection; it should also enforce and monitor the programs and actions developed under this policy.

The Department should also guide users and provide them with information concerning their contact and interaction with Fiocruz's architectural, urban, and archeological collection.

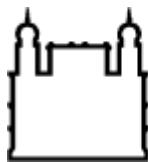
In conjunction with the COC's Vice-Directorship for Information and Cultural Heritage, the Department should also identify needs by consulting with the managers of the organizational units that occupy preserved spaces so that it can guide the use and occupancy of Fiocruz's architectural, urban, and archeological collection.

Preservation and Management Policy for the Archival Collection

Description

The initial nucleus of the permanent archival collection under the custodianship of the Casa de Oswaldo Cruz first took shape in 1986, when steps were taken to create sources of historical research and to preserve Fiocruz's institutional memory. The projects "Guide to sources on the history of public health" and "Treatment and expansion of the iconographic collection of the Oswaldo Cruz Institute Museum" (both in Port.) led to the formation of the original nucleus of the institute's collection. Around the same time, the project "Formation of a collection of oral interviews on the history of the Oswaldo Cruz Foundation and practices in public health" (in Port.) made it possible to identify and acquire personal archives belonging to noteworthy figures in the fields of the biomedical sciences and public health. Among these are the archives of the scientists Oswaldo Cruz and Carlos Chagas and the glass negatives of the Oswaldo Cruz Institute Fonds (1903-1946), which UNESCO's Memory of the World program recognized as documentary heritage of humanity in 2007, 2008, and 2012, respectively.

The [**archival collection**](#) currently contains institutional as well as personal fonds and documentary collections in the form of texts, iconography, cartography, sound recordings, and moving images dating from 1803 through the present.



In keeping with the COC mission, the thematic parameters of these institutional and personal archives are the life sciences – encompassing the health, biomedical, and biological sciences – and also the human and social sciences.

Purpose

This policy defines the guidelines and responsibilities that govern preservation and management actions involving archival fonds. Furthermore, based on the preservation management programs listed in [Attachment I](#) and pursuant to the legislation and standards applicable to cultural collections listed in [Attachment II](#), this policy provides guidance for the formulation of specific plans and projects.

Guidelines

The Preservation and Management Policy for the Archival Collection endorses the [general guidelines](#) and sets out the following specific guidelines for this collection:

Strategic actions to preserve the archival collection should respect Brazil's National Archives Policy, legislation governing cultural heritage, and principles concerning citizens' rights to information and to privacy.

Actions to preserve the archival collection should comply with the established archival principles of provenance and of respect for fonds in order to preserve the organic relation between documents and the elements that determine the specificity of an archival document.

Responsibilities

The [COC Standing Committee on Collections](#) should define and periodically revise the thematic line(s) that guide the expansion of the archival collection; it should also evaluate the accession of new assets and pronounce itself on the matter, always in consonance with this document's general and specific guidelines.

The [Department of Archives and Documentation](#) should be the custodian of the archival collection and should be responsible for access to it; it should further be assigned to implement the guidelines and procedures used in collection management.

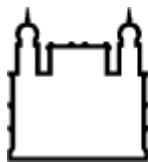
The [Documents and Archives Management System](#) should establish guidelines for the management of archival documents.

The Standing Committee on the Appraisal of Archival should draw up, authorize, and guide application of the Temporality Table, which is a tool that defines timeframes for storing archival documents and their final destination.

Preservation and Management Policy for the Bibliographic Collection

Description

The COC's Library for the History of Science and Health began its work in 1991, when it received a bibliographic collection from what was then the Manguinhos Central Library. This collection essentially comprised duplicate copies of books and periodicals, along with bibliographic material of a historical nature, which was no longer appropriate to the collection held by the Central Library.



As the acquisition of other funds and documentary collections progressed, new bibliographic collections were incorporated into the initial set.

The final product was a [**bibliographic collection**](#) specialized in the history of medicine, the history of public health, history, sociology, and the philosophy of science. The collection contains primary and secondary literature, including noteworthy classic works in the fields of the biomedical sciences and public health, as well as bibliographic material from the private collections of health professionals. It holds monographs, reference works, theses, dissertations, pamphlets, and electronic material dating from the seventeenth century through the present.

The COC's Library for Science Education and Communication opened its doors in 1999 with the inauguration of the Museum of Life, to which it is tied. Its [**bibliographic collection**](#) encompasses the areas of science communication, education, museology, the life sciences, health, and literature for children and young people. It comprises reference works, monographs, theses, dissertations, pamphlets, games, and audiovisual material.

Purpose

This policy defines the guidelines and responsibilities that govern preservation and management actions involving bibliographic collections and information. Furthermore, based on the preservation management programs listed in [**Attachment I**](#) and pursuant to the legislation and standards applicable to cultural collections listed in [**Attachment II**](#), this policy provides guidance for the formulation of specific plans and projects.

Guidelines

The Preservation and Management Policy for the Bibliographic Collection endorses the [**general guidelines**](#) and sets out the following specific guidelines for this collection:

Actions to preserve the bibliographic collection should be guided by the thematic lines pertinent to COC working areas, with an emphasis on the history of science and of health.

Actions to preserve bibliographic collections should take into account Ranganathan's Laws, that is, the five laws of library science, to wit: 1. Books are for use; 2. Every reader, his or her book; 3. Every book, its reader; 4. Save the reader's time; 5. The library is a growing organism.

Taking into account the norms and standards of library science, actions to manage the bibliographic collection should be guided by the standardization of descriptions, classification, and indexing in order to provide a descriptive and thematic representation of documents.

Responsibilities

The [**COC Standing Committee on Collections**](#) should define and periodically revise the thematic line(s) that guide the expansion of the bibliographic collection and should evaluate the gathering and accession of new assets and pronounce itself on the matter, always in consonance with this document's general and specific guidelines.

The [**Library for the History of Science and Health**](#) should be the custodian of this collection and should be responsible for access to it; it should further be assigned to implement the guidelines and procedures used in collection management.

The [**Museum of Life Department**](#) should organize and be the custodian of the collection of the Library for Science Education and Communication.



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The [**Library for Science Education and Communication**](#) should facilitate public access to the collection and should further plan, put in place, and refine its collection management processes.

Preservation and Management Policy for the Museological Collection

Description

Oswaldo Cruz himself proposed that a science museum be established at the Federal Serum Therapy Institute (Instituto Soroterápico Federal) as part of the original format of this institute, which worked in experimental medicine and public health in the early twentieth century. Designed along the lines of the era's European study museums, it was closed to the public and had the task of gathering and maintaining biological collections relating to the institute's activities.

Following the death of Oswaldo Cruz in 1917, his work room was transformed into the Oswaldo Cruz Museum, and a historical collection began to be compiled from his personal and professional objects. The original collection grew as other objects belonging to the scientist were donated by his family and by businesses and as scientific equipment and instruments from the Oswaldo Cruz Institute were added.

In the 1970s, museologists were hired to reorganize the Oswaldo Cruz Museum. This heralded a new phase, when the first steps were taken in the systematization of museological practices, which involved identifying, selecting, acquiring, and documenting the older objects and equipment that had been replaced by more modern versions at the institute's organizational units. These efforts produced a new historical collection, representative of the work conducted at Fiocruz.

When the Casa de Oswaldo Cruz was created in 1985, measures to preserve Fiocruz's memory and its cultural heritage were expanded. Following the establishment of the Museum of Life as a department of the COC in 1994, the old museum was redesigned based on new policies and methods for storing and preserving the collection, which culminated in the organization of the Museum Holdings in Storage section (Reserva Técnica).

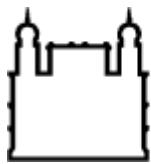
Classified in the area of science and technology in health, the [**museological collection**](#) highlights the history of Fiocruz. Covering the period ranging from the mid-nineteenth century to the present, this collection comprises laboratory instruments and equipment, materials and machinery used to produce medicine and vaccines, medical instruments, furniture, clothing, personal objects belonging to the institute's scientists, and a picture gallery.

Purpose

This policy defines the guidelines and responsibilities that govern preservation and management actions involving the museological collection. Furthermore, based on the preservation management programs listed in [**Attachment I**](#) and pursuant to the legislation and standards applicable to cultural collections listed in [**Attachment II**](#), this policy provides guidance for the formulation of specific plans and projects.

Guidelines

The Preservation and Management Policy for the Museological Collection endorses the [**general guidelines**](#) and sets out the following specific guidelines for this collection:



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Actions to preserve the museological collection should be guided by thematic lines pertinent to COC and Fiocruz working areas, in addition to the history of science and health.

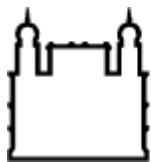
Actions to preserve the museological collection should comply with the principles of provenance and authenticity in order to preserve the relation between objects and their characteristic elements that determine their specificity and value as a museological object.

Actions to preserve the museological collection should respect the set of governing standards that address cultural and scientific heritage as well as the principles that ensure citizens' rights to information and to privacy.

Responsibilities

The [**COC Standing Committee on Collections**](#) should define and periodically revise the thematic line(s) that guide the expansion of the museological collection and should evaluate the gathering and accession of new assets and pronounce itself on the matter, always in consonance with this document's general and specific guidelines.

The [**Museum of Life Department**](#) is the custodian of the museological collection and is responsible for access to it; it is further assigned to implement the guidelines and procedures used in management of the collection.



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FUNDAÇÃO OSWALDO CRUZ. [Política de Seleção da Rede de Bibliotecas da Fiocruz](#). 2003.

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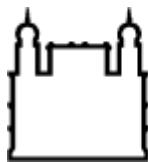
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MAST — [Basic Guide for the Preservation of Laboratory Archives](#)

MAST — [Política de Preservação de Acervos Institucionais](#)

MAST — [Política de Segurança para Arquivos, Bibliotecas e Museus](#)

MUSÉUM NATIONAL D'HISTOIRE NATURELLE — [Missions](#)

NATIONAL LIBRARY OF AUSTRALIA — [Collection Development Policy](#)

NATIONAL LIBRARY OF AUSTRALIA — [Guidelines for the Preservation of Digital Heritage](#)

NATIONAL LIBRARY OF AUSTRALIA — [Preservation Policy](#)

NATIONAL LIBRARY OF NEW ZEALAND — [Conservation Standards](#)

NOVA SCOTIA MUSEUM — [Collection Management Policy](#)

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RANGANATHAN, S. R. *The Five Laws of Library Science* (1st ed.) (Madras, India: Madras Library Association and London: Edward Goldston, Ltd., 1931).

SMITHSONIAN INSTITUTE — Smithsonian National Museum of Natural History. [The United States National Herbarium Collections Management Policy](#)

SMITHSONIAN INSTITUTION — [Front Royal Site Cultural Resource Assessment](#)

SMITHSONIAN INSTITUTION — [Historic Preservation Policy Standards](#)

SMITHSONIAN INSTITUTION — [Historic Preservation Terms](#)

SMITHSONIAN INSTITUTION — [Qualifying Smithsonian Structures and Sites](#)

SMITHSONIAN INSTITUTION — [Smithsonian Institution Archives](#)

SMITHSONIAN INSTITUTION — [Smithsonian Institution Historic Preservation Policy](#)

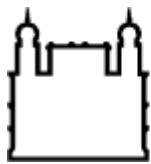
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UNESCO. [Guidelines on preservation and conservation policies in the archives and libraries heritage](#). Paris, 1990.

UNIVERSIDADE DE LISBOA / Museu Nacional de História Natural de Lisboa — [Política de Gestão das Colecções do Museu Nacional de História Natural](#). 2011

UNIVERSIDADE DE LISBOA / Museu Nacional de História Natural — [Política de Gestão das Colecções 'Museu Bocage'](#). 2008

UNIVERSITY OF ARIZONA — [Historic Preservation](#)



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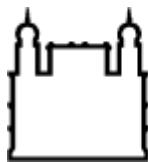
UNIVERSITY OF ARIZONA — [Historic Preservation Plan](#)

UNIVERSITY OF ARIZONA — [Historic Preservation Plan - Appendix 3: Maintenance Manual for Historic Buildings](#)

UNIVERSITY OF ARIZONA — [Historic Preservation Plan Appendix 4: Maintenance Manual for Historic Landscapes](#)

USP — [Edifícios da FAU como bem cultural](#)

VALLE, Clarimar Almeida. [Subsídios para uma Política de Preservação e Conservação de Acervos em Bibliotecas Universitárias Brasileiras](#). Master thesis. Universidade de Brasília, Brasília, 1991.



The Casa de Oswaldo Cruz Preservation and Management Policy for Cultural Collections in Science and Health

Attachment I – Preservation and Management Programs

The programs that are part of the Preservation and Management Policy for Cultural Collections in Science and Health are listed below. Detailed content and information on program plans and projects will be made available as these are concluded.

Accession program

This program guides the activities involved in identifying new objects for collections and establishes general guidelines that stipulate criteria for accession, deaccession, and disposal, consonant with the codes of ethics of national and international bodies, the COC mission, and the thematic lines of its collections. The program defines priorities in terms of typologies, conservation, storage, and resources.

Technical processing program

This program defines procedures and methodologies for collection documentation. It specifies the standards to be used in organizing collections.

Conservation and restoration program

This program defines the criteria, methods, and techniques to be applied in collection conservation and restoration. It defines preventive measures to minimize the deterioration of materials, including environmental management and the establishment of collection monitoring and inspection routines.

Safety program

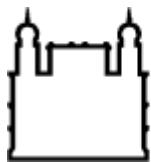
This program encompasses responsibilities; governing technical standards and legislation; levels of access to the various collections; load and capacity limits for buildings; and procedures to be followed to minimize the risks of theft, vandalism, and damage to collections. It defines the methodology to be adopted in risk management of buildings, collections, and the public.

Access, loans, and reproduction program

This program defines the criteria, standards, and instruments for accessing collections. It sets out the criteria, conditions, and procedures for collection handling, loans, and reproduction. It establishes a digital preservation plan that includes goals, material selection criteria, procedures for different kinds of support, technological resources, financial resources, infrastructure, and team training.

Cultural dissemination program

This program defines priority initiatives for the dissemination of collections and related knowledge, bearing in mind the guidelines of other programs. It adopts a plan for the dissemination of knowledge relating to the collections and for the production of publications and other products and initiatives for both peer institutes and non-specialized audiences, with the purpose of valorizing this heritage.



Casa de Oswaldo Cruz Preservation and Management Policy for Cultural Collections in Science and Health

Attachment II - Standards

Under the heading ***General legislation***, this attachment lists the standards that apply under law to the collections of which the COC is the custodian. Under the heading ***General standards and guidelines***, it also lists those that provide guidance for actions involving these collections, either owing to the technical nature of the standards and guidelines or to the fact that they speak to the principles that orient the COC Preservation and Management Policy for Cultural Collections in Science and Health.

General Legislation

BRASIL. **Lei nº 9610, de 19 de fevereiro de 1998.** Lei dos Direitos Autorais (Copyright legislation). http://www.planalto.gov.br/Ccivil_03/LEIS/L9610.htm (accessed May 10, 2012). Amends, updates, and consolidates copyright law and contains other provisions.

BRASIL. **Decreto Lei Federal nº 25, de 30 de novembro de 1937.** Regulates the protection of national historic and artistic heritage and creates the instrument of “tombamento” [by which an asset is declared tangible or intangible heritage].

BRASIL. **Constituição Federal de 1988.** Art. 216. Deals with tangible and intangible Brazilian cultural heritage.

General Standards and Guidelines

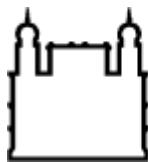
FUNDAÇÃO OSWALDO CRUZ. **Plano Quadrienal 2011-2014.** In FUNDAÇÃO OSWALDO CRUZ. Relatório Final do VI Congresso Interno Fiocruz. A Fiocruz como Instituição Pública Estratégica de Estado para a Saúde. 2011. Deals with the strategic projects to be developed by the COC during this period and indicates the specific goals and results to be achieved. www.fiocruz.br

CASA DE OSWALDO CRUZ. **Plano Quadrienal 2011-2014.** Deals with the strategic initiatives to be implemented by the COC during this period and indicates the goals to be met, along with associated assessment indicators. www.coc.fiocruz.br

CASA DE OSWALDO CRUZ. **Manual de organização** (Rio de Janeiro: Casa de Oswaldo Cruz, 2007). Deals with the composition of the COC's organizational structure and defines the scope of authority for the sectors and levels within the COC.

ICOMOS. **Declaração de Curitiba.** 2009. (Curitiba Declaration).

UNESCO. **Convention concerning the Protection of the World Cultural and Natural Heritage.** 1972.



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UNESCO. [Recommendation for the Protection of Movable Cultural Property](#). 1978.

UNESCO. [Declaration on the Responsibilities of the Present Generations towards Future Generations](#). 1997.

UNESCO. Memory of the World. [General guidelines to safeguard documentary heritage](#). 2002.

Specific Standards Applicable to the Architectural, Urban, and Archeological Collection

Legislation

Decreto-Lei estadual nº 02/1969. Regulates the protection of state historic and artistic heritage.

Decreto Municipal nº 22.872, de 07 de maio de 2003. Stipulates that all works undertaken directly or indirectly by the City government in areas suggestive of historic interest and that entail urban and/or topographic intervention shall call for studies and monitoring with archeological research in mind.

Lei Estadual nº 509, de 3 de dezembro de 1981. Deals with the State Council on the Declaration of Heritage (Conselho Estadual de Tombamento).

BRASIL. **Lei Federal nº 3924/1961**. Deals with the definition of archeological monuments, permission to conduct archeological research, and fortuitous discoveries.

Standards and Guidelines

IPHAN. **Instrução Normativa nº 1 de 25 de novembro de 2003**. Deals with accessibility to immovable cultural assets protected at the federal level and also with other categories.

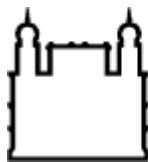
IPHAN. **Portaria nº 32 de 12 de janeiro de 1981**, publicada no Diário Oficial da União em 14/01/1981. Deals with the declaration of the Moorish Pavilion, the Clock Pavilion, and the Stables as national heritage sites by Brazil's Institute of Historic and Artistic Heritage (IPHAN).

INEPAC. **Resolução nº 50 de 17 de outubro de 2001**, publicada no Diário Oficial do Estado de 22/10/2001. Deals with the declaration of the Arthur Neiva Pavilion and the Carlos Augusto da Silva Pavilion as state heritage sites by Rio de Janeiro's State Institute of Cultural Heritage (Inepac).

IPHAN. Registro da Jazida do Vale do Mosquito no Cadastro Nacional de Sítios Arqueológicos (CNSA) do IPHAN em 1962 (registry of the Vale do Mosquito Mine in IPHAN's National Registry of Archeological Sites [CNSA] in 1962).

IPHAN. Registro da Jazida de Manguinhos no Cadastro Nacional de Sítios Arqueológicos (CNSA) do IPHAN em 1966 (registry of the Manguinhos Mine in IPHAN's National Registry of Archeological Sites [CNSA] in 1966).

IPHAN. **Portaria nº 230/2002**, Artigo 6º. Deals with contract provisos regarding heritage education programs.



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IPHAN. **Portaria nº 299/2004**. Creates the Historic Urban Site Preservation Plan.

IPHAN. **Portaria nº 07/1988**, Artigo 5º, IV 5 e 6. Deals with the requirements for permission to conduct field research in the case of excavations that are part of the execution of a project that has a direct or indirect impact on an archeological site.

CONFEA. Decisão Normativa CONFEA nº 83, de 26 de setembro de 2008. Deals with procedures for oversight of professional practices and activities involving monuments and sites of cultural value and their surroundings or setting.

ICOMOS. The Venice Charter. [International charter for the conservation and restoration of monuments and sites](#). 1964.

ICOMOS. The Florence Charter. [Historic Gardens](#). 1981.

ICOMOS. Washington Charter. [Charter for the conservation of historic towns and urban areas](#). 1987.

ICOMOS/ICAHM. [Lausanne Charter for the protection and management of the archaeological heritage](#). Lausanne, 1990.

[The Declaration of Amsterdam](#). Congress on the European Architectural Heritage. Amsterdam, 1975.

ICOMOS. Xi'an Declaration. [Declaration on the conservation of the setting of heritage structures, sites and areas](#). 2005.

Specific Standards Applicable to the Archival Collection

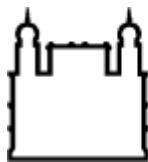
Legislation

BRASIL. **Lei federal nº 8.159/1991**. Deals with public and private archive policy.

BRASIL. **Lei federal nº 12.527/2011**. Legislates access to information as provided for in item XXXIII, article 5; item II, paragraph 3, article 37; and paragraph 2, article 216, of the Federal Constitution; amends Law no. 8.112, of December 11, 1990; revokes Law no. 11.111, of May 5, 2005, and also provisos contained in Law no. 8.159, of January 8, 1991; makes other provisions.

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **Legislação Arquivística Brasileira**. Compilation by Brazil's National Board of Archives (CONARQ) of Brazilian legislation applicable to archival documents and their custodian institutions.

<http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=49>



Standards and Guidelines

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **NOBRADE: Norma Brasileira de Descrição Arquivística** (Rio de Janeiro: Arquivo Nacional, 2006), 124 pp.; 29.7 cm. <http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

INTERNATIONAL COUNCIL ON ARCHIVES (ICA). **ISAD(G): General International Standard Archival Description**: adopted by the Committee on Descriptive Standards, Stockholm, Sweden, September 19-22, 1999 (2nd edition); final version approved by the ICA. <http://www.icacds.org.uk/eng/ISAD%28G%29.pdf>

INTERNATIONAL COUNCIL ON ARCHIVES (ICA). **ISDIAH - International Standard for Describing Institutions with Archival Holdings**. London, United Kingdom, 2008 (1st edition). Determines the type of information that can be included in descriptions of institutions with archival holdings and provides guidance on how these descriptions can be developed within an archival descriptive system. <http://www.ica.org/?id=10198>

INTERNATIONAL COUNCIL ON ARCHIVES (ICA). **ISDF – International Standard for Describing Functions**. Dresden, Germany, 2007. Determines the type of information that may be included in descriptions of functions and provides guidance on how these descriptions can be developed within an archival descriptive system. <http://www.ica.org/?id=10208>

INTERNATIONAL COUNCIL ON ARCHIVES (ICA). **ISAAR (CPF) – International Standard Archival Authority Record for Corporate Bodies, Persons and Families**. Canberra, Australia, 2003 (2nd ed.). Provides guidance for preparing archival authority records which provide descriptions of entities (corporate bodies, persons and families) associated with the creation and maintenance of archives. <http://www.ica.org/?id=10203>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **Carta para a Preservação do Patrimônio Arquivístico Digital**, Rio de Janeiro, 2004. Expresses the need to establish policies, strategies, and actions that ensure long-term preservation and ongoing access to digital archival documents. <http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **Diretrizes para a Gestão Arquivística do Correio Eletrônico Corporativo**. Rio de Janeiro, 2012. Defines guidelines and recommendations with the goal of guiding bodies or agencies that use email as a work tool in the archival management of corporate email messages. <http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **Diretrizes para a presunção de autenticidade de documentos arquivísticos digitais**. Rio de Janeiro, 2012. Establishes guidelines for the presumption of authenticity of digital archival documents with the goal of ensuring the identity and integrity of these documents and minimizing the risk of changes from the moment they are first saved and throughout all subsequent accesses. <http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). **Modelo de Requisitos para Sistemas Informatizados de Gestão Arquivística de Documentos - e-ARQ Brasil**. Rio de Janeiro, Edição



revisada, 2011. Presents a Model of Requirements for Computerized Archival Document Management Systems (e-ARQ Brasil), which sets out minimum requirements for a Computerized Archival Document Management System (SIGAD), independent of the technological platform in which the system was developed and/or implemented.

<http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). Recomendações para Digitalização de Documentos Arquivísticos Permanentes. Rio de Janeiro, 2010. Presents recommendations aimed at helping institutions with permanent archival holdings to design and carry out digitalization projects and programs.

<http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

CONSELHO NACIONAL DE ARQUIVOS (CONARQ). Recomendações para o resgate de acervos arquivísticos danificados por água. Rio de Janeiro, 2012. Presents recommendations to be adopted on an emergency basis, especially by institutions that do not as yet have a disaster prevention plan in place, with the purpose of fostering the stabilization of the ambient conditions at storage places and documentary supports until such time as conservation specialists can undertake an evaluation.

<http://www.conarq.arquivonacional.gov.br/cgi/cgilua.exe/sys/start.htm?sid=20>

FIOCRUZ. Portaria PR 371/2007. Approves the use of the Oswaldo Cruz Foundation's archival document classification code.

FIOCRUZ. Portaria PR 353/2009. Establishes the Oswaldo Cruz Foundation's Document and Archives Management System.

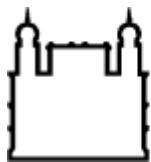
CONSELHO NACIONAL DE ARQUIVOS (CONARQ). Resolução CONARQ nº 14 de 24 de outubro de 2001. Approves the revised, expanded version of Resolution no. 4, of March 28, 1996, which deals with the "Public Administration Archive Document Classification Code: 'Means' Activities," to be adopted as a model for current archives by bodies and agencies that are part of Brazil's National Archives System (SINAR), as well as timeframes for the storage and destination of documents established in the "Basic Table on Temporality and the Destination of Archive Documents Relating to 'Means' Activities in the Public Administration."

Specific Standards Applicable to the Bibliographic Collection

Legislation

BRASIL. Lei Nº 4.084, de 30 de junho de 1962. http://www.planalto.gov.br/ccivil_03/leis/1950-1969/L4084.htm (accessed on May 14, 2012). Deals with and regulates the exercise of the profession of librarian.

BRASIL. Lei Nº 10.753, de 30 de outubro de 2003. http://www.planalto.gov.br/ccivil_03/leis/2003/l10.753.htm (accessed on May 14, 2012). Establishes Brazil's National Book Policy.



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Standards and Guidelines

FUNDAÇÃO OSWALDO CRUZ. **Política de Seleção da Rede de Bibliotecas da FIOCRUZ.** http://bvsfiocruz.fiocruz.br/local/File/politica_selecao.pdf (accessed on May 10, 2012). Deals with procedures involving management of the collections belonging to the libraries that are members of this network.

FUNDAÇÃO OSWALDO CRUZ. **Regimento da Rede de Bibliotecas da FIOCRUZ.** http://www.fiocruz.br/redebibliotecas/media/regimento_rede.pdf (accessed on May 10, 2012). Bylaws for the Oswaldo Cruz Foundation's library network. Deals with the make-up of the organizational structure of Fiocruz's Library Network and establishes the scope of responsibilities falling to member libraries.

FUNDAÇÃO OSWALDO CRUZ. Casa de Oswaldo Cruz. **Normas e procedimentos da Biblioteca de História das Ciências e da Saúde.** Deals with the consultation and use of the bibliographic collection and establishes penalties for its improper use.

Specific Standards Applicable to the Museological Collection

Legislation

BRASIL. [Lei nº 11.906, de 20 de janeiro de 2009](#). Creates the Brazilian Museum Institute (IBRAM) and makes other provisions.

BRASIL. [Lei nº 11.904, de 14 de janeiro de 2009](#). Establishes the Museum Statute and makes other provisions.

Standards and Guidelines

MINISTÉRIO DA CULTURA. Política Nacional de Museus. Memória e Cidadania. Brasilia, 2003 (National Museum Policy: Memory and Citizenship).

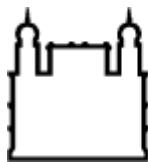
MINISTÉRIO DA CULTURA. INSTITUTO BRASILEIRO DE MUSEUS. Plano Nacional Setorial de Museus - 2010/2020, Brasilia, 2010 (National Sector Plan for Museums - 2010/2020).

INTERNATIONAL COUNCIL OF MUSEUMS (ICOM). Professional Standards. <http://icom.museum/professional-standards/>

Specific Standards Applicable to Research and Development in Preservation

Legislation

BRASIL. [Lei nº 10.973, de 2 de dezembro de 2004](#). Deals with incentives for innovation and scientific and technologic research within the production environment and makes other provisions.



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BRASIL. [Lei nº 8.112 de 11 de dezembro de 1990](#). Deals with the legal system for federal employees, employees of autarkies, and employees of federal public foundations.

Standards and Guidelines

MINISTÉRIO DA SAÚDE. [Resolução 196/96 do Conselho Nacional de Saúde](#). Deals with guidelines and standards regulating research on humans.

[Singapore Statement on Research Integrity](#). Statement developed as part of the 2nd World Conference on Research Integrity, July 21-24, 2010, in Singapore, as a global guide to the responsible conduct of research.

Specific Standards for Education in the Preservation and Management of Collections

Legislation

BRASIL. [Lei nº 12.343, de 2 de dezembro de 2010](#). Establishes Brazil's National Cultural Plan for 2010-2020.

BRASIL. [Lei nº 9394, de 20 de dezembro de 1996](#). Lei de Diretrizes e Bases da Educação Nacional (Brazil's National Education Law).

CONSELHO NACIONAL DE EDUCAÇÃO. [Resolução CNE/CEB nº 1, de 21 de janeiro de 2004](#). Establishes National Guidelines for the organization and realization of student internships in Professional Education.

BRASIL. [Lei nº 8.112 de 11 de dezembro de 1990](#). Deals with the legal system for federal employees, employees of autarkies, and employees of federal public foundations.

BRASIL. [Decreto nº 5.707, de 23 de fevereiro de 2006](#). Establishes and regulates Personnel Development Policy and Guidelines for employees of the direct federal public administration (both autarkies and foundations).

Standards and Guidelines

WLO. [Human Resources Development Recommendation, 2004 \(No. 195\)](#). Recommendation concerning Human Resources Development: Education, Training and Lifelong Learning. International Labour Organization. Geneva, 2004.

IPHAN. Texto Base para uma Política Nacional no Âmbito da Educação Patrimonial. [Documento final do II Encontro Nacional de Educação Patrimonial](#) – Ouro Preto/MG - 2011 (Final document of the 2nd National Meeting on Heritage Education).

COC. Política de Ações de Educação Continuada. 2011. Presents criteria and procedures guiding the participation of employees in continuing education activities within the Casa de Oswaldo Cruz and serves as the foundation for drawing up the Annual Continuing Education Plan.



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