

# **Loans between National and Non-national Museums**

## **New Standards and Practical Guidelines**

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### **Introduction**

The collections of the UK's national museums and galleries are unique in the world in terms of their size, richness and diversity and have the capacity to inspire, excite and instruct in equal measure. Their collections are held in trust for the benefit of the nation and arguably are important components of a single national collection.\* The national museums are committed to improving access to this 'national collection' not only through exhibition, display, reference and research within their own institutions, but also by lending objects from their collections to publicly funded museums all over the UK.

Thousands of objects are lent every year by national and non-national museums throughout the UK. However, the National Museum Directors' Conference recognises that the achievement of the necessary step change in access to the national collections requires a clear and specific commitment to standards of best practice.

This document, commissioned by the National Museum Directors' Conference in September 2001 and produced by a working party made up of representatives of both national and regional museums, therefore publicly makes that commitment by setting out standards that national museums will seek to meet relating to loans to museums within the UK. The details of these standards are set out on page 3. The rest of the document addresses the loan process in more detail and sets out practical guidance on steps both borrower and lender can take to facilitate the process and make best use of the resources

available, and in so doing ensure the new standards are met. This document focuses specifically on short-term loans for museum exhibitions. However, many of the principles will apply to loans for research and long-term loans.

\* The term 'national museum' is used to refer to those institutions which are 'national by virtue of a status conferred through legalisation and are directly funded by government, and are members of the National Museum Directors' Conference. For the purposes of this document it includes the British Library, National Library of Scotland, National Library of Wales and The National Archive. A list of NMDC members is included inside the back cover.

The term non-national museum is used to refer to publicly funded museums, other than those directly funded by central government.

## **Standards for National Museums and Galleries**

National Museum Directors' Conference members undertake to meet the following standards, subject to the resources available.

National museums and galleries will:

1. Provide a straightforward means of access to information about their collections and where possible Internet access to collections data
2. Clearly identify points of contact for the administration of each loan on the museum website and in all related printed material
3. Have a written loans policy, available on the museum website and on request
4. Require a minimum notice period of no more than six months for loans to UK organisations, subject to availability and condition of the item
5. Acknowledge receipt of loan applications within three weeks, letting the borrower know when they will hear whether the application has been approved
6. Make every effort to lend, other than where issues concerning the availability, condition, or security of the object, or ethical considerations preclude it, within the resources available
7. Provide reasonable access to curators to enable applicants to conduct research and determine suitability of loan objects
8. Provide advice on display conditions and installation procedures necessary to maintain the safety of the object
9. Be pragmatic about lending where environmental conditions are not ideal and offer help in finding potential solutions to any problems with environmental and display conditions at the borrowing institution

10. Only use couriers where circumstances demand and share them wherever possible
11. Not charge administration fees for loans to UK borrowers
12. Keep all costs to the borrower to a minimum and communicate their likely level to the borrower as early as possible
13. Minimise the cost to the borrower of any conservation treatment that is required to enable the object to travel and be fit for display
14. Be transparent in handling loan requests, including providing an explanation of any difficulties or delays and full reasons behind any refusal to lend

If the lending museum cannot meet a particular standard for any reason, it will explain this to the borrower as soon as possible.

## **Practical Guidelines for Facilitation of Loans**

Ensuring that the borrower and lender understand each other's needs from the start will make the process run more smoothly and should help ensure the standards set out in on page 3 are met. This section is intended to highlight areas that borrowers and lenders need to discuss.

### **Research and Planning**

Thorough preparation makes the loans process easier. Borrowers need to allow sufficient time for preliminary research and choice of objects.

#### **Finding out what is available**

Museums often receive repeated requests for a small number of well-known items in their collections. It is not uncommon for 'star items' to have been requested several years in advance, and they must also have a residency period at their home institution to meet visitor expectations. Considering objects in store and reserve collections greatly widens the choice available and increases the likelihood that they will be available at the time required.

Although many museums do not have complete illustrated catalogues, large proportions of the national collections are becoming available on the internet. Talking to staff and visiting the collections is another valuable way of finding out what may be available to borrow. Visiting collection stores can also provide a useful opportunity to meet with professional colleagues and discuss the exhibition.

Where possible a borrower should see the exhibit before it is requested to check its suitability to the subject or theme of the exhibition, examine the exhibit's condition with the lender, and begin to consider

any special handling, packing, transportation, display conditions or conservation work that may be required. Research time and costs should be built into exhibition budgets and external funding applications from the outset.

### **Getting in contact**

Speaking to the curators and registrars at the lending institution at an early stage can make the loans process simpler, though a formal letter will be required at a later stage. For loans, the first contact should normally be with the collections department, registrar, or with the relevant curatorial department if there is no central collections department.

The contact person for loans should be clearly identified on museums' websites or printed material. It may be a good idea to speak to both the curator and registrar: the curator may have an expert knowledge of the collection, while the registrar will be able to discuss availability and requirements of particular objects. If an object cannot be lent, they may be able to suggest alternatives or perhaps another lender.

National museums and galleries will:

- Provide a straightforward means of access to information about their collections and, where possible, Internet access to collections data
- Clearly identify points of contact for the administration of each loan on the museum website and in all related printed material
- Provide reasonable access to curators to enable applicants to conduct research and determine suitability of loan objects

### **Timing**

Arranging loans can be time-consuming. While lending museums will try to be as flexible as possible they may have to complete a series of internal processes, often including consideration by the Board of Trustees, before a loan can be approved. A considerable amount of information about current use, future use, copyright, photography scheduling, object condition, conservation requirements and display environment parameters must often be gathered before the loan can be confirmed and objects that are to be lent may have to be scheduled into the lender's conservation, packing and photography programmes. A lender's minimum notice for loan applications should be no more than six months. However, in certain circumstances, such as when a large number of items are requested, or when items require considerable conservation or preparation, longer might be required. Insufficient notice is one of the major reasons for loan requests being turned down. Submitting applications as early as possible means

potential problems can be identified quickly and addressed together.

National museums and galleries will:

- Require a minimum notice period of no more than six months for loans to UK organisations, subject to availability and condition of the item
- Acknowledge receipt of loan applications within three weeks, letting the borrower know when they will hear whether the application has been approved

### **Budget planning**

Borrowing objects from other collections can be expensive. Although national museums do not charge administration fees for UK loans, the costs of transport, insurance, conservation, security and environmental requirements can be extensive. The cost of the loan can run from zero to several thousands of pounds for a single object. Lenders should, where possible, seek to keep costs to the borrower to a minimum. Borrowers need to be aware from the outset which costs they are likely to be responsible for and those that will be met by the lending institution. This is essential for the preparation of realistic budgets and funding applications. Awareness of the likely costs from the beginning of the loan process can help avoid wasted time and resources for both lender and borrower.

The following factors may affect the cost to the borrower:

- preparation of a conservation assessment and condition report
- conservation and preparation costs (photography, time and materials)
- security requirements, which may include extra staffing
- valuations and appraisals
- indemnity/insurance
- packing (time and materials)
- crate hire and storage fees
- transport
- couriers and installation experts (time, travel, accommodation)
- providing appropriate environmental and security conditions, including lux levels and the provision of specialist equipment
- costs of reproduction and photography
- photography and filming of objects during installation
- exhibition installation costs - including special display requirements, fixtures and fittings and hire of equipment and specialist technicians

### **Keeping each other up-to-date**

It is important that both lender and borrower keep each other up-to-date with developments and potential problems throughout the application and preparation period. Lenders should tell borrowers when they can expect to hear about the progress of their application. If the borrower decides they cannot take up a loan, they should inform the lender immediately, so that work being carried out in preparation for the loan can be suspended. Borrowers should be aware that they might be liable for costs that have been incurred. Likewise, if the lender decides that they cannot lend an object, they should let the borrower know as soon as possible, explaining the reasons fully and suggesting alternative objects.

National museums and galleries will:

- Not charge administration fees for loans to UK borrowers
- Keep all costs to the borrower to a minimum and communicate their likely level to the borrower as early as possible
- Minimise the cost to the borrower of any conservation treatment that is required to enable the object to travel and be fit for display

## **Procedures and Administration**

Museums have formal administrative procedures for approval of loans to ensure the care of the collection.

### **Loans Policy**

All museums are keen to enable the widest possible access to their collections. However, lending policies may vary considerably from museum to museum, because of the particular needs of different collections, constraints within institutions and priorities of governing bodies. In national museums, for example, it is often a two-stage process: loans must first be considered by curators, or registrars and conservators, and are then subject to the approval of the museum's Trustees, who may only meet a few times a year. It is unusual for curators and or registrars to have the authority to promise loans. The onus is on the lender to provide information about loans, policies and conditions.

If possible, this information should be accessible on the museum's website, with hard copies available on request. Loan procedures should be kept as straightforward as possible and the policy should include:

- an explanation of the stages in the process for approving loans
- details of the criteria on which applications will be judged
- an indication of how long the process takes, giving deadlines for applications
- contact name and number

## **Loan Applications**

Formal applications need to be submitted for all loans, regardless of previous discussions with staff at the lending museum. Some museums expect formal requests to be addressed to the director, others to the curator or registrar. The institution's loans policy should make it clear to whom applications should be addressed. The formal request should include:

- title of the exhibition
- venues and dates
- organiser's name, address and contact details
- scope of the exhibition
- type of loan - temporary, long term, touring exhibition
- a complete list of the objects requested, where possible quoting object numbers
- reasons for inclusion of the objects
- who is responsible for preparing the exhibition
- who is responsible for organising transport between venues
- who will be providing insurance or indemnity
- whether the exhibition will tour and details of responsibility for arranging transport and meeting costs
- whether a publication will be produced
- a completed UK Registrars Group standard facilities report including further details on the venue where possible

Including this information in the initial letter will make it easier for lenders to meet the six month turn around requirement for loan requests.

## **Confirmation of the loan**

Once the loan has been agreed, the lender will send an official document. It may come in the form of a contract or letter. It should set out both the borrower's and lender's responsibilities, indicating likely costs, and who will pay them. It may include specific requirements concerning security and environmental conditions.

## **Refusal of loan request**

Loan requests should not normally be turned down other than where issues concerning the availability, condition, or security of the object preclude the loan within the resources available. For example, a particular object may not be available if it is required for display at the home institution, for conservation, or research projects, as well as if it is committed to loan elsewhere. Assessment of the availability and condition of an object may also extend to consider future availability of an item. For example, for works on paper, which have a limited display

life, the lending institution may need to make a decision based on the importance of the item to a particular exhibition. In certain circumstances a museum may turn down a loan request for ethical reasons, if for example the display is thought likely to cause offence to certain groups or members of the public, or the object is the subject of a restitution claim.

Lenders should be transparent in handling loan requests, including providing an explanation of any difficulties or delays and full reasons behind any refusal to lend. In circumstances where a loan is likely to be refused for the stated reasons, the lending institution should, if possible, suggest an alternative loan of an object or alternative lenders if appropriate.

National museums are keen to increase access to their collections by lending items to UK museums wherever possible. Decisions to turn down loan applications are not made lightly and will often have been taken at the highest levels.

National museums and galleries will:

- Have a written loans policy, available on the museum website and on request
- Make every effort to lend, other than where issues concerning the availability, condition, or security of the object, or ethical considerations, preclude it within the resources available
- Be transparent in handling loan requests, including providing an explanation of any difficulties or delays and full reasons behind any refusal to lend

## **Insurance and Government Indemnity Scheme**

### **Government Indemnity Scheme**

The Government Indemnity Scheme (GIS) plays an important role in facilitating loans and enabling wider access to collections by providing borrowers with an alternative to commercial insurance. It means that a museum, gallery or library can arrange to borrow objects from non-national institutions and in the event of loss or damage, compensation will be paid to the owner by the Government up to the agreed value of the loan. Therefore the Government, rather than an insurance company, carries the risk. The GIS can cover loans whilst they are in transit, to and from the borrowing venue, storage, setting up, display and dismantling i.e. 'Nail to Nail'. GIS requires borrowers to underwrite or cover the minimum liability for each loan object. For a loan to be eligible for Indemnity, borrowers are required to operate according to GIS standards relating to transport, security and environmental conditions as well as those governing food and drink in the exhibition



space. Indemnity applications are handled by Resource and must be submitted at least three months in advance.

There is no indemnity cover for loans from national museums. This is because of Government Accounting rules whereby public bodies bear their own risk for public property. The Secretary of State does not guarantee compensation to a national institution for loss or damage to public property, however there are discretionary arrangements for deciding whether, and to what extent national institutions might be compensated. The GIS guidelines set out the financial liability a non-national undertakes when it accepts a loan from a national museum. Full details are provided in the Government Indemnity Guidelines published by DCMS and Resource.

### **Local Authority and Commercial Insurance**

Commercial insurance can be quicker to arrange than GIS, though most fine art insurers will expect GIS conditions to be met. Some borrowers, particularly local authority museums, may be required to obtain insurance through their governing bodies. Any insurance cover must provide for 'Values Agreed', 'All Risks' and 'Nail to Nail' cover. This means the insurance must run continuously for the whole period of the loan, usually from the first physical actions to take the object on loan, such as removing a picture from the wall, to the last moment of its return and re-hanging. The insurance must cover loss or damage arising from accident, misfortune or crime occurring en-route, as well as while loans are at the borrowing museum. The maximum cover for one single loss must meet the cost of the most valuable object. Insurance should be included in the terms and conditions of the loan agreement. The onus is on the lender to check any exclusions in the policy and ensure their needs are met. Therefore, the lender should be supplied with a copy of the policy for review well in advance and they should be sent the certificate of insurance before the object leaves the lending institution.

Copies of Government Indemnity Scheme Guidelines for National Institutions are available from DCMS  
[www.culture.gov.uk/culturalproperty/government\\_indemnity.htm](http://www.culture.gov.uk/culturalproperty/government_indemnity.htm)

Guidance for non-national museums is available from Resource  
[www.resource.gov.uk/action/gis/00gis.asp](http://www.resource.gov.uk/action/gis/00gis.asp)

In Scotland, Wales and Northern Ireland, indemnities are provided by the devolved administrations.

## **Security, Environment and Display**

Appropriate environmental conditions and security arrangements are essential to successful loan agreements. Problems can arise when there is a disparity between the conditions the borrowers can provide and those that the lender requires to maintain the safety of the object. However, this does not necessarily mean that the loan cannot proceed. Borrower and lender should discuss any difficulties that arise, as it is often possible to solve them together. There are often a number of ways of achieving the specified standards, and negotiation can lead to a suitable compromise.

### **Providing information about conditions - Standard Facility Report**

The UK Registrars Group Facilities Report is the standard form that lenders use to collect information regarding physical facilities, display conditions and environment at the borrowing institution. It will be updated in 2003 to include security conditions. The UKRG Facilities Report is designed to help both borrower and lender identify issues which can then be resolved through negotiation and co-operation.

### **Security**

Agreement to the loan will depend on the borrower providing appropriate security for the object. Minimum standards are set out in Resource's Registration Scheme guidelines but museums may also have their own security requirements. Borrower and lender need to discuss and agree minimum levels of security for the particular objects involved and these should be set out in the loan agreement.

Lenders will always want to be informed in detail about security conditions in transit and at the borrowing institution. This may be done through discussion with the borrower, inspection of the exhibition space or consultation with the Museum Security Adviser (MSA). The MSA may visit the borrower's venue or send a questionnaire in order to confirm that reasonable measures are in place to protect the objects from fire or security breaches, and assist the borrowing institution in making improvements if required.

Security is an important issue but it need not necessarily be a major obstacle to loans. Although there are fixed minimum standards, particularly if using the Government Indemnity Scheme, lending museums are keen to help as far as possible. The MSA can play an important role in facilitating loans. Museums that are planning to instigate a programme of borrowing should assess their security provision early and seek the help of the MSA as far in advance as possible.

## **Environment**

The ability to monitor and provide appropriate and stable environmental conditions in the exhibition space is important.

The UKRG Facilities Report is available on-line at: [www.ukrg.org](http://www.ukrg.org)

The Museum Security Adviser can be contacted at Resource ([www.resource.gov.uk](http://www.resource.gov.uk))

The basic provisions are set out in the Registration guidelines. Lenders should highlight specific requirements for the environmental conditions early in the negotiations, and borrowers in turn should inform lenders of their parameters.

Borrowing institutions will need to know what range of environmental conditions they can offer and provide a record of conditions in the display space and any areas where objects may be stored. This record will be required at the Facilities Report stage of the application.

Lenders should be pragmatic about lending where environmental conditions are not ideal and offer help in finding potential solutions to any problems with environmental and display conditions at the borrowing institution to maintain the safety of the object.

Borrowers should ensure that the lender's requirements are communicated to all relevant personnel who may come into contact with the loan object, such as conservators, engineers, lighting technicians and couriers. Should any change in conditions arise, borrowers are obliged to inform lenders immediately.

The National Gallery Technical Bulletin is a useful source of information on environmental conditions, requirements and restrictions. Useful guidance is also provided by Museum Practice and the Museum and Galleries Commission's 'Standards in the Care of Collections' series.

## **Display**

The display conditions required will reflect the security and fragility of the object and depend on its value, risk of theft and the material it is made from. The GIS Conditions are the benchmark to which national museums have to pay attention.

Problems in this area should not arise as long as the lender and borrower discuss how the loan is to be displayed. The borrower's gallery manager or technician should be consulted at an early stage.

### **Lighting and Design**

If possible, the exhibition space should be lit before objects arrive to minimise the risk of damaging objects that are being installed.

However, if it cannot be avoided, borrowers should advise lenders on

how their objects will be protected during this time. Borrowers should plan how to protect light sensitive objects both during the exhibition period and during installation.

#### Showcases, Fixings and Materials

Knowing the specifications - size and weight - of the loan item is essential. The exhibition designer must be made aware of the condition requirements for the object. Materials used in display cases may be hazardous. Borrowers should be prepared to provide lenders with information about the design and material of showcases. Time may be required to test display conditions.

The National Gallery Technical Bulletin is available on-line at [http://www.nationalgallery.org.uk/collection/tech\\_bulletin.htm](http://www.nationalgallery.org.uk/collection/tech_bulletin.htm)

Lender and borrower need to discuss the type of walls (especially temporary walls), wall-fixings and showcases that are to be used. This information will be required in the Facilities Report. Some lenders may require their own fittings to be used. If so, they need to agree whether these will be sent with the object.

The sort of questions that might arise include:

- whether showcases, plinths or Perspex stands mounts will be used and if these will be prepared by the lender or borrower? (if Perspex mounts are used they must be prepared in advance)
- what other objects will be in the case?
- how will the case be sealed?
- what type of fittings will be used? Some lenders may require their own fittings to be used. Will these be sent with the object?
- what fabrics will be used in the display cases?
- how hard is the backing? Will captions be pinned or hammered into place?
- how will the object be displayed?
- who will be responsible for installing the objects?
- what are the cleaning arrangements for the exhibition space?

National museums and galleries will:

- Provide advice on display conditions and installation procedures necessary to maintain the safety of the object
- Be pragmatic about lending where environmental conditions are not ideal and offer help in finding potential solutions to any problems with environmental and display conditions at the borrowing institution

## **Packing, Transport and Couriers**

Packing, transport and couriers can add significantly to the cost of loans. The costs will vary greatly depending on the specifications required for care of a particular object. Three-dimensional objects are often more complicated to pack, transport and install than two-dimensional objects. Lender and borrower should try to help each other by reducing costs where possible. Lender and borrower need to be clear about their minimum specifications for packaging, transport and couriers.

### **Packing**

Packing requirements will differ from object to object. The onus is on the lender to inform the borrower about likely packing requirements and give an indication of the sort of costs that might be involved. Packing crates and materials may be expensive. It is sometimes assumed that museums keep crates for their objects - but this is generally not the case.

Borrower and lender need to agree who will pack the objects and who will bear the costs. This should be stated clearly in the loan agreement. There is considerable variety of practice: the lender's own staff may do the packing, and if so costs in staff time and/or materials may or may not be absorbed by the lender; the transport company may do the packing with costs passed on to the borrower; some lenders allow borrowers to pack objects.

The lender should ensure the borrower is aware if experienced personnel or specialist lifting and handling equipment will be required for particular objects. Last minute changes can affect the cost.

Objects must be returned in the same cases, including lining and internal fittings, if appropriate. This means borrowers will generally be expected to provide suitable storage space for packing cases. Some museums include this as a requirement in the conditions of loan.

Borrowers will be expected to replace tissue or polythene if it is torn or dirty. Borrowers should ensure that essential personnel who may deal with packing such as art/object handlers are aware of these arrangements. All lenders should provide packing notes giving clear instructions, including photographs where possible. The condition report should be included in the case with the object, unless a courier is travelling with the object.

At the dismantling of the exhibition the borrower should have on hand fresh supplies of materials such as acid free tissue, polythene and bubble wrap to replace any materials damaged during unpacking.

### **Transport**

Transport is generally organised and paid for by the borrower. The

arrangements need to be approved by the lender in advance. Lenders should be able to advise on appropriate transport and borrowers should be transparent about the arrangements they are planning. The standards stipulated in the Government Indemnity Scheme guidelines state what is likely to be required. Air-ride vans and two drivers are nearly always mandatory. Climate control and tail-lift are also sometimes necessary. One person in each institution should take the lead in discussions over transport arrangements to avoid any potential confusion. In larger institutions, this would usually be the registrar or their equivalent.

Both lender and borrower need to consider access to the museum and exhibition space, for example whether the vehicle can get to the museum doors, whether the crate will fit through doors and in lifts, and any temporary hazards such as roadworks or scaffolding. Crates can often be bigger and heavier than expected. The lender will be more familiar with the object and any specific handling requirements. They have a responsibility to ensure the borrower has adequate information about the object in order to be able to deal with it on arrival.

Collection and delivery dates need to be mutually agreed by lender and borrower in advance, and in consultation with the transport agents - if agents are used. Using part-loads in agent's vehicles can make a significant difference to the cost. However, it is worth noting, that this could make collection dates less flexible.

## **Couriers**

Many loans will not require couriers. Using a courier can significantly increase the cost to the borrower and the reasons for using one should be carefully considered. The decision to use a courier for a loan should be taken at an appropriately high level within the lending institution.

Couriers may be required for any of the following reasons:

- a complicated journey
- size of consignment
- special handling requirements
- fragility of the object
- particular conservation concerns about the object
- complicated installation/size of object
- value of item
- first time loan to new venue

When couriers are used, they can perform a useful role in forging links and partnerships between institutions. Networking and exchange of technical and curatorial knowledge is an important aspect of the role.

Guidelines for couriers have been produced by the UK Registrars Group. These can be found at [www.ukrg.org](http://www.ukrg.org)

The AAM Code of Practice for Couriers of Museum Objects (Registrars Committee of the American Association of Museums 1986) is another useful reference.

Lending museums generally require couriers to provide a report on the trip, which provides useful feedback and information about the borrower's facilities. The UKRG Courier Guidelines provide details of what a courier report should include. This informs and assists the return courier and can result in a courier not being required for the return journey. It can also help to facilitate future loans.

Lenders may be asked to justify the need for a courier. If a courier is to be used, his or her role is to deal with any problems and hazards that might be encountered in transport, to ensure that loans reach their destination safely and ensure the standards agreed by the lender and borrower are adhered to. Using a courier can help keep down premiums for commercial insurance. Large consignments, using separate vehicles, may require extra couriers.

Couriers have specific duties and responsibilities and these may be set out in the loan agreement or accompanying documentation.

With appropriate training, a wide range of museum staff can undertake courier trips. This may enable a greater degree of flexibility about travel dates. The onus is on the lending institution to ensure that the courier is the right person for the job and is trained and well briefed.

The courier's duties may include:

- accompanying the objects in the vehicle during transport
- dealing with any unexpected problems that arise
- overseeing, advising on or undertaking the unpacking and installation of the loan
- carrying out a condition check
- producing a report
- dismantling and packing object for return journey

The cost of a courier may include transport, overnight accommodation, meals and associated expenses. The *per diem* should be agreed in advance and based on a realistic estimate of expenses including any evening meals and accommodation - if this has not already been paid for. The courier will expect to receive the *per diem* in cash. This can cause problems for some borrowers, particularly local authority museums, and may need to be arranged in advance.

Borrowers should make every effort to deal with the courier quickly. If more than one courier is expected, it is sensible to schedule their

arrival times so that they do not all arrive at the same time. Couriers need to be flexible and respond to the borrower's schedule. They should not make other engagements that may conflict with their courier duties.

While one night's stay might generally be sufficient for trips within the UK, if the object needs to acclimatise before installation, the courier may need to stay longer. Overnight stops might not be required at all for short journeys.

It is sometimes possible for different lenders to share a courier. This can reduce the cost to the borrower and should be considered wherever appropriate. The borrower should inform the lender in advance of other institutions that are also lending and whether there is a potential to share. These arrangements should be agreed in advance and responsibility for the objects must be clarified and explained to the courier. Lenders and borrowers should be clear about what they want the courier to do and ensure that the courier is briefed on the physical characteristics and condition requirements of the objects in their care. The courier should have contact numbers, including out-of-hours numbers, for lenders, borrowers and any agents.

National museums and galleries will:

- Only use couriers where circumstances demand and share them wherever possible

## **Installation and Maintenance**

### **Installation**

Objects are most at risk from damage or loss during the installation process. Careful planning (space, time and motion), management and communication can help ensure risks are minimised. Preparation of the display area (painting, construction, etc) must be completed and all contractors off site before objects are installed.

The exhibition space and unpacking area should be regarded as a controlled space and access should be restricted as much as possible. Any other likely use of the space, such as fire escapes, through access for disabled visitors, etc, should be properly accommodated and the lender informed in advance. Additional security may be required during installation and dismantling.

The borrowing institution may need to be flexible about accepting delivery of loan objects over lunch periods or out of normal working hours. The cost of staff cover needs to be balanced against the costs involved in delaying delivery, including, for example, overnight



storage.

There should be an agreed cut-off time for the delivery.

Installation checklist for borrowers:

- prepare an installation plan and circulate it to relevant staff
- ensure that the team installing the loan is clear who is in charge
- know where objects are to be placed - even a rough plan is useful here - a photocopy of the loan placed in position in the display case or on the wall can save time during installation
- consider in advance where crates will be stored, for example, they may need to be stored off-site and returned at the end of the loan to allow time to acclimatise before repacking
- be aware if crates are to be left to acclimatise before unpacking
- conservation and installation teams should be ready to receive incoming loans and work with any couriers
- technicians or conservators must be available should any incidents arise
- the team should be clear on which crates or packs cannot be opened, handled and installed without courier supervision
- any necessary specialist handling equipment should be made ready
- the installation team must understand any specific handling instructions which accompany the loan, for example, if gloves are to be used, and which fixtures and fittings are required
- condition reports and packing notes should be completed and the organiser immediately advised of any problems on unpacking
- ensure keys or locking mechanisms for any cases are at hand, that mounts are ready and that security screws and screwdrivers are available
- ensure that all loans to be placed in a single case are ready for placement at the same time
- establish a secure location for storage of case keys
- all labels to be placed inside display cases containing couriered objects should be ready for placement before the cases are sealed or locked

## **Maintenance**

Arrangements for maintenance of the exhibition space after installation should be discussed between lender and borrower. Areas of potential difficulty might include dusting and special events in the exhibition area.

Maintenance is particularly an issue for long-term loans.

## **Long-term Loans and Touring Exhibitions**

### **Long-term Loans**

Although most loans between museums are for short-term exhibitions, long-term loans, of a year or more, require additional considerations. In addition to all the steps that need to be followed for loans to temporary exhibitions, both parties need to consider the following aspects:

- what is the loan period and is it to be renewable by mutual agreement? Long-term loans are usually for set, renewable periods, such as three, five or possibly ten years
- what arrangements are to be made for monitoring the loan? (Most lenders may send out an annual inventory for the borrower to confirm that the object is still safely there and could request environmental readings at regular intervals)
- will the lender wish to visit to undertake a regular inventory and condition check, and who will meet the cost of this? (Normally the borrower, but this may be negotiable)
- what arrangements will be made for the regular amendment of insurance values?
- the importance of labelling long-term loans (archival tags for three-dimensional objects and labels attached to the backing of paintings or framed works on paper; indicating the lender and loan reference)
- ensuring that relevant staff are aware of the long-term loans in their museum
- the terms of the loan should be clear from the outset, for example arrangements for moving the object

### **Touring Exhibitions**

Institutions organising or taking touring exhibitions need to have very clear agreements outlining their mutual responsibilities for the exhibition before they organise the first loan. Issues to consider include:

- who is the tour organiser?
- will they be responsible for meeting all expenses, preparing loan agreements and then passing on these costs?
- is there Government Indemnity/insurance cover for the whole tour or are individual venues responsible for arranging cover?
- Each venue of a tour needs to apply separately for Government Indemnity, but only the first applicant needs to send the photographic material
- many lenders require each venue of a tour to sign the lender's own loan agreement, to confirm that they will meet their conditions

- will the tour organiser be responsible for all packing, transport and courier arrangements and costs incurred?
- is there any shared equipment, or catalogues or information packs to accompany the exhibition?
- what arrangements are being made for the changeover between venues? How much time has been allowed for closure, de-installation and packing (perhaps with couriers), transport to the next venue and then unpacking and installation? Will the venue be ready for the exhibition?
- how will loans be stored during the gap between the display periods? Will some lenders want their loans returned to them if there is a gap of more than a few weeks?
- will couriers be required for each change of venue? Will lenders agree to entrust management of the tour to the organizing institution or to share couriers?
- will you have a changeover of objects between venues? Some lenders will not lend light-sensitive objects for long tours or they may have a policy about the maximum number of venues in the tour
- if you are receiving a touring exhibition you must be clear about your responsibilities and be aware of any specific lender's requirements about display or couriers

Special consideration should be given where objects are borrowed from commercial dealers or where a commercial gallery is a potential venue. If this is the case, Government Indemnity would not be applicable and commercial insurance would be required. There may be additional security arrangements.

For touring exhibitions, it may be simpler for the organiser to draw up all contracts rather than having individual contracts between lenders and each touring venue.

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