

Exhibition loans

Many historic libraries will be familiar with receiving requests to loan material out for exhibition, and this is a great way to increase the audience for your collections and raise your profile. However, exhibition loans can be complicated, and may pose a risk to your collections if not handled properly. This guide aims to introduce the issues concerned and provide assistance in basic procedures and sources of further information.

Loaning material out to other institutions

- Have a **loan policy** – makes it clear who is responsible for making decisions about loans, as well as the timescales. This avoids problems with other members of your institution promising loans that cannot be fulfilled, or that would endanger collection items. There are many examples online of loan policies.
- **Timescales** – most organisations do not allow loan requests to be considered later than six months before an exhibition, and often a year or more is usual, particularly to organise the necessary paperwork and get permission from relevant committees/senior management. It is a good idea to have your **loan policy** available on your website, clearly setting out required timescales.
- Expect museums to use the museum collection management standard SPECTRUM, which has a section specifically covering exhibition loans. SPECTRUM is freely available: <http://www.collectionstrust.org.uk/spectrum/the-spectrum-standard>
- The lender should expect an institution wishing to borrow books to make an **informal approach** first, to discuss what suitable material you have and whether or not it could be considered for loan. This is a good opportunity to discuss some initial restrictions, and to raise awareness of the wealth of material you might be able to offer on a subject, which they may not know about. Be aware that in some situations special permission may be needed for a loan, for example a cathedral wanting to loan an item listed on its inventory would need to have FAC approval for the loan (CFCE if it's an outstanding item).
- The borrower should then submit a **formal loan request**. It will usually consist of a letter explaining why the loan is requested, the duration of the loan, information about the exhibition (if this is the reason for the loan) and a full list of objects requested.
- If not included in the loan request, the lender can ask them to submit a **facilities report**, which is a **UK Registrars Group (UKRG) questionnaire** which asks the borrower to state environmental conditions, location they intend to display your material, their security, their disaster plan, who is authorised to handle objects, what mounts they could use to display your material, whether they allow food or drink etc. A link to the standard UKRG facilities report is here. <http://www.ukregistrarsgroup.org/file-uploads/large/UKRG-Facilities-report.pdf> This is used by most accredited organisations and most museums will be familiar with the forms and use them. Appendix B includes an example loan application form.

- The lender should be condition checking objects already at this point to see if the material is suitable for loan or if it would require conservation work. Open communication about this should happen between the institutions.
- The lender can then decide if the conditions at the borrowing institution are suitable for your material. If you are the decision maker for the loan, you can then decide if it should proceed. Otherwise, you should make a recommendation to any relevant committees or senior management, along with submitting the request for discussion.
- Overseas loans may require an export licence, airport customs and security clearance, all of which need to be arranged in good time, and must be arranged on behalf of the lending library. Art handling/courier companies are usually able to assist with this.
- It is important to remember that, if you are at all uneasy about any of the borrower's proposed conditions, there is no obligation to carry on with the loan or to loan any item out.

If the loan can go ahead:

The lenders should communicate the requirements and provisos of the loan going ahead. This might include the borrowing institution making some changes or improvements to their environmental conditions, or arranging for different display cases or particular mounts. The borrowing institution would assess the feasibility and cost of this.

The lender should also:

- Organise or supply valuations for all objects being loaned and tell borrowing institution
- Check borrower's insurance and ask to have a copy confirming objects are covered
- Check the mounts/supports the borrowing institution has are suitable and up to conservation standard or supply them yourself
- The lender may want a site visit to check environmental conditions if they do not have figures or there is any concern
- Fill in a condition form for all objects which will travel to the borrowing organisation for their information (Appendix A has an example condition form)
- Both parties should sign a loan agreement document (see Appendix C for an example)

Transport

- Borrowers should pay for all loan costs, including transport and packing materials. It is up to the organisation's discretion how and what you charge for this. You may prefer not to charge for packing materials dependent on budgets.
- If objects can be packed safely for transit by the lender, do so.
- If the lender is happy to, objects can be couriered in a taxi by a representative. This is practical if the borrowing institution has a small budget and is nearby, and is maybe only borrowing one or two objects.
- For larger objects or for large numbers of objects – borrowers can use a fine art transport company like Crown Fine Art, Momart or Constantine.
- If the borrower books a transport company, you can also request a seat on the truck if you'd like to accompany the objects

Compile a courier pack of documents to accompany the loan – checklist:

- Condition check form/s (see appendix A)
- Exit form – document to record an object leaving the library site and why. One copy will remain with the borrower for the duration of the loan. Also remember to update your LMS to indicate that the item is not available to users for the duration of the loan.
- Loan deposit form with space to sign that condition report is accurate upon arrival (see appendix D)
- Cover sheet with contact details of lending organisation's representative/s, the fine art transport company if necessary, the dates of the loan, destination etc.
- Information sheet on packing, handling and mounting requirements. This is particularly important if you are not accompanying the loan.

When you get there

- The borrowing organisation will usually have some paperwork for the lender to sign on arrival. They may have a loan deposit form themselves.
- The lender will go through the condition report with the borrower and agree it is correct. Any amendments will be made and signed off by both parties.
- The lender can either stipulate in advance if they would like to be present for the object to be installed directly into the display case, or if they would be happy for it to go into storage.

Duration of the loan

- The lender can request environmental readings are sent at intervals if there is any concern or records need to be kept
- A site visit to check on the loan can be requested
- Be aware that if an extension to the loan is requested this may require seeking additional permission from committees or senior management.

Loan return

- The borrower will contact the lender with some dates for returning the loan to check they are suitable
- When the object returns, condition check it and go through the original report, noting any changes or damage and sign a loan collection form or something similar.

Further sources of information

Collections Link has other relevant guidance and documentation:

<http://www.collectionstrust.org.uk/collections-link>

Freda Matassa, *Organising Exhibitions* (Facet, 2014)

Alison Cullingford, *The Special Collections handbook* (Facet, 2011)

The Historic Libraries Forum is grateful to the Royal College of Physicians for permission to use their loan documentation as templates.

Appendix A: Condition check form

Condition check form

Object name:	Acc. No:	Location:
Image:	Medium:	Size:

Initial assessment (including previous repairs):

Appendix B: Loan application form

Example collections loan application

A responsible officer of the borrowing library must read, sign and return this form before a request for loan will be considered by the *library*.

The *Library* will lend to institutions and exhibitions which meet the intent of its mission statement and support the aims of its strategic plan. This is to enable the collections to be seen by a wider audience and promote the current work and history of the *Library*.

REQUESTING A LOAN FROM THE *LIBRARY*

Contact *library* staff to discuss potential loans. After preliminary discussions, a formal request for loans should be made in writing. This application form must be completed before the loan can be assessed.

Approval of loans

All loan requests are assessed and authorised by the *Library's management committee* who will notify you of their decision as soon as possible.

Period of notice

We prefer that loan requests are submitted not less than six months before the date for which they are needed. Complex or large requests, as well as loans to international destinations, should normally be submitted not less than twelve months before they are required.

Please let the *Library* know of any proposed changes in the loan details immediately as they may need the approval of the *Library's management committee*. We need as much notice as possible for loan requests so we can schedule conservation and administration into our work commitments.

Non-availability of objects for loan

An object requested for loan may be refused for one or more of the following reasons:

- The object has attached conditions, or contains restricted information which prohibit its loan
- The object is fragile and should not be subjected to the risks of movement
- The object is on display, being researched or is committed to other programmes
- The object has already been displayed for a considerable time prior to the loan request
- There is insufficient time to process the loan request and/or to provide appropriate packing and treatment for the objects
- The objects are unique and/or irreplaceable
- The Borrower cannot meet the conditions of the loan, e.g. provision of adequate security or environmental conditions for the objects

Right to withdraw

The *Library* reserves the right to refuse to lend objects, to withdraw objects from an agreed loan list, or to recall objects on loan at any time, although as far as possible reasonable notice of recall will be given. Failure to comply with any of the conditions of loan may result in the immediate withdrawal of loan material.

Conditions of loan

The general conditions of loan are listed below. These may be supplemented by special conditions in certain circumstances.

Period of loan

The maximum period for a loan is five years. The Borrower may reapply for loan of objects after this period. Loans will not be made on an indefinite or 'permanent' basis.

Light sensitive or vulnerable objects, or objects required for other purposes, may only be available for shorter periods. Loans of more than one year duration will be checked periodically by the *Library* at intervals to be agreed with the Borrower at the outset

Access

The *Library* will request that the Borrower give reasonable access to the *Library's* staff and other named people to view objects lent from its collections. This will be arranged in consultation with the Borrower.

Costs

The Borrower will be responsible for the following costs where appropriate:

- Insurance
- Object preparation (for example: mounting, framing, glazing, materials testing, display mount making)
- Conservation prior to the loan
- Condition checks
- Photography
- Packing cases
- Transportation
- Courier expenses
- Photography and reproduction fees
- Conservation required as a result of damage occurring to the object during the loan period

The Borrower may also be required to meet any costs associated with checking loans. This includes agreed periodic checks and any emergency situation. The *Library* will inform the Borrower of estimated costs as soon as possible.

Redress for cancellation

If a loan, or part of a loan, is cancelled by the Borrower, the *Library* will normally seek redress for any material costs incurred.

Insurance

The Borrower must insure all objects, at valuations determined by the *Library*, against 'all risks' and on a 'nail to nail' basis. A copy of the insurance policy and certificate must be sent to the *Library* contact before the objects are released.

Security

The Borrower must give information about security, fire precautions and emergency planning to the satisfaction of the *Library*.

- Venues should be fitted with fire detection/prevention and intruder alarm systems which are either connected to a local police station or monitored internally twenty-four hours a day
- The building and exhibition/display spaces should normally be physically guarded when open to the public
- A copy of the venue's emergency plan and arrangements for the loaned item must be submitted
- Details of security precautions will be treated confidentially.
- The *Library* may require other special protective measures in specific circumstances, for example, case alarms

Storage and study

Objects in store awaiting display, or those which have been lent for study purposes, should be kept in an area which can meet the same security and environmental conditions outlined within this document.

There must be no smoking, eating and drinking in the area where the objects are stored before display, or in the area where the objects are studied.

Display

Display conditions must be agreed in advance. The exhibition space should be prepared and ready for use before the loan material arrives.

- Cases must be lockable and dust proof.
- Works of art will normally be lent glazed. Paintings must be placed behind a barrier, unless otherwise agreed with the curator, and the hanging system must be agreed in advance.
- Objects on open display should normally be placed at least a metre behind barriers, except by agreement with the *Library*.
- Objects must not be moved without prior written permission from the *Library* except in an emergency. In this event, the *Library* must be informed immediately
- If the area is to be used for functions, these must be agreed with the *Library* in advance
- Smoking must not be permitted at any time in the area

ENVIRONMENTAL CONDITIONS

All objects must be stored, housed or displayed in a suitably stable environment avoiding extremes of temperature and relative humidity. The *Library* will always work with the prospective borrower to

find acceptable solutions. Unless there are exceptional circumstances the *Library* will not specify conditions that are more stringent than those where the objects are normally housed. Unless otherwise stated on the detailed schedule, the following conditions apply:

Relative humidity

40–65% RH with fluctuations of no more than 10% within these limits in any 24-hour period. These conditions must be maintained for 95% of the time.

Temperature

16–26°C with no more than a 4°C variation within these limits in any 24-hour period. These conditions must be maintained for 95% of the time

Control systems

All humidity and heating control systems should operate for 24 hours a day throughout the loan period unless monitoring data can be supplied to support an alternative strategy.

Lighting conditions

- 80–300 lux depending on the sensitivity of the object (specific light levels will be supplied for each object). For exceptionally light sensitive objects or for loans of over 3 months, lower levels may be required. Where some daylight or other variable source is present levels based on cumulative exposure will be considered. We ask that objects are lit during public opening hours only.
- Ultraviolet (UV) light must be below 75 microwatts per lumen at the above illumination levels. Daylight, fluorescent and other lamps which exceed this should be fitted with a suitable UV absorbing material.
- All lamps and any control gear or transformers should be fitted in a ventilated compartment separated from the object by a sheet of glass, or mounted externally to the case. Normally only fibre optic tails will be permitted in the same compartment as the objects. Access to the lights for maintenance should not involve opening the object compartment.
- To ensure the proposed venue meets these conditions, the *Library* normally requires environmental monitoring data from the Borrower for a similar period of time as the proposed loan. The *Library* normally requires the Borrower to monitor the conditions for the duration of the loan.
- We are happy to discuss these requirements. If you feel you cannot meet these conditions or require further clarification or advice, please contact the *Library*.

Condition checking

Condition reports will be prepared by the *Library* for all objects. These will be checked and agreed on arrival at your venue, before repacking at the end of the loan period, and then again upon return to the *Library*.

Any apparent changes to the condition of the objects during the loan period must be reported to the *Library* immediately. In the case of long-term loans, it is the Borrower's responsibility to check the condition of the objects at frequent intervals. If changes have taken place, the *Library* may decide to

recall its objects. The *Library* reserves the right, by prior arrangement, to send staff to visit the venue and examine the condition of its objects at any time during the loan period.

Handling

- Objects must only be handled by the *Library's* staff or authorised personnel, unless in an emergency
- The *Library* may request special handling instructions for sensitive materials
- Objects must not be cleaned or conserved by the Borrower without written permission from the *Library*
- Labels or other identifying markings must not be moved or obliterated
- No mark in pencil, ink, paint or any other material should be made on the objects, nor should labels or other adhesive materials be applied to them

PACKING AND TRANSPORT

Packing and transport arrangements must be agreed with the *Library*. For touring exhibitions, this includes transportation between venues. Transport, collection and delivery arrangements should be agreed well in advance.

Purpose-built packing cases may be required for objects travelling long distance by road or air. Materials used in the construction of the cases should be approved by the *Library*

- Overseas transport must be handled by an approved shipping agent
- The Borrower will normally be responsible for storing the packing materials in a secure and environmentally suitable place throughout the loan period
- For the return journey, objects should be packed and transported in the same way as for the outward journey

Couriers

The *Library* may ask that one or more members of staff accompany objects in transit to oversee unpacking and installation, as well as the deinstallation and repacking. This will depend on the complexity of the arrangements and the value and the fragility of the object. In the case of touring exhibitions, a courier may be required to accompany objects between venues.

Couriers must receive adequate subsistence (to be agreed in advance) on arrival to cover all expenses, including a reasonable level of hotel accommodation (room with private bath/shower) for overnight stays. If public transport is used, couriers should travel first class by rail or business class by air whilst accompanying objects.

A courier will usually be needed for overseas loans. The *Library* will consider sharing couriers with other lenders, although this will depend on individual circumstances.

- For loans to European countries, couriers should normally receive subsistence to cover two working days and two nights hotel accommodation
- For loans outside Europe, couriers should normally receive subsistence to cover three working days and three nights hotel accommodation

ACKNOWLEDGEMENTS

Acknowledgement must be made to the *Library* in exhibition graphics and other notices, or literature. The following credit line should be used:

Lent by the ...

Photography and reproduction

Appropriate acknowledgement to the *Library* must always be given when reproducing an image of an object in any format or medium. The following credit should be used:

© ...

The *Library* must receive at least two copies of any publication, publicity material or leaflets issued in connection with the exhibition.

Written permission from the *Library* is needed for individual photography or filming of objects. Copyright of any photographs or film footage must be assigned back to the *Library*. Use of photographic lights must also be agreed by the *Library* beforehand. General views of the exhibition may be photographed for press and publicity purposes. Photographic orders and requests to reproduce images from official *Library* photographs should be referred to the contact. A list of charges is available.

The tenets of United Kingdom copyright law must always be observed. In cases where an object is within copyright, this right rests with the *Library*, unless it has been previously recognised as belonging to another body.

Publication right

When an object has not previously been published (as defined by the 1 December 1996 European Union directive) and is then published or displayed to the public by the Borrower, publication rights must be assigned back to the *Library*.

PRESS AND PR

Please obtain the permission of the *Library* for any publicity or marketing activity associated with the loan of an object.

The above conditions have been read and understood and will be complied with

Signed _____ Date _____

Name (in BLOCK LETTERS) _____

Position in borrowing library _____

B. PURPOSE OF LOAN AND FACILITIES INFORMATION

Please submit information on the reason for your loan request.

If this application is an exhibition loan request, please send additional information on the content and scope of the exhibition and the rationale for the inclusion of the *Library's* object(s).

THE EXHIBITION

1. Title: _____

2. Date of opening: _____

3. Date of closing: _____

4. Name and address of library where the exhibition/loan is to be held:

(a) Name of Library: _____

(b) Address of building in which the exhibition/loan is to be held:

Tel. No. of building: _____

5. Name and address of the official to whom correspondence should be addressed:

Tel. No.: _____

Fax. No.: _____

email: _____

6. ITEMS REQUESTED FOR LOAN

Object Number(s)/Shelfmark/Item ID	Name of object / title	Brief Description of materials

CONSERVATION

7. Do you keep monitored records of environment within the proposed exhibition area?
8. If so, what are the room's guaranteed limits for temperature?
_____ to _____ °C
9. What are the room's guaranteed limits for relative humidity?
_____ to _____ RH

Lighting

10. Are there windows in the exhibition area?
11. **IF YES**, in which direction do the windows face (N, S, E, or W)?
12. Does natural light fall directly onto the display area at any time?
13. Are there window-blinds or curtains to control the light from the windows?
14. **IF NO**, are there curtains to cover the appropriate showcases?
15. If there are showcase curtains, are they drawn over the showcases at all times (except when viewed)?
16. Or, drawn over at night only?
17. Please describe the means of general artificial lighting (if spotlights are used, please also describe):

18. Will lights be used inside the showcase ?
19. Are there ultra-violet filters on windows, lights and showcases?
20. What is the maximum lux level in the exhibition area?
21. What is the maximum lux level within the showcases?
22. What is the maximum lux level within the particular case(s) where this/these item(s) will be displayed?

Fire precautions

23. Describe the detector systems for fire/heat/smoke within the exhibition area:

24. Do the detector systems set off automatic alarms?
25. Do they set off automatic extinguisher systems?
26. **IF YES**, please describe the systems
Sprinkler / Gas / Foam / Other:

27. State the number and type of fire extinguishing equipment in the exhibition area:

28. Is smoking allowed within the exhibition area?

29. Please describe any other fire precautions:

Flood Precautions

30. Is the exhibition area in the basement of the building or otherwise at flood risk?
31. **IF YES**, please describe:

32. Are there tanks, waterpipes (including drains, sewers, & c.), or washrooms, laboratories, above the exhibition area?
33. Are there humidity control systems &c., so conducted as to prevent water entering the showcases (as appropriate)?

Hazardous Chemicals

34. Are hazardous chemicals stored or in use nearby?
35. **IF YES**, how near are these to the exhibition area?

SECURITY

You are not required to state your exact security provisions on paper,
but we need to know whether there are:

36. Security precautions (lock, alarms, &c.) built into the showcases and/or elsewhere?
37. Special precautions (e.g. security guards) during the periods of mounting and dismantling the exhibition?
38. Attendants present during exhibition opening times?
39. Appropriate safeguards (e.g. alarms) when the exhibition is closed (at nights, weekends, &c.)?
40. Does the library have a Disaster Recovery Plan?

IF YES, which emergencies do these cover?

FIRE / FLOOD / SECURITY

41. Can a copy of the Disaster Recovery Plan be supplied to the College?

Historic Libraries Forum

If so, please send with this application form

The above conditions have been read and understood and will be complied with

Signed _____ Date _____

Name (in BLOCK LETTERS) _____

Position in borrowing library _____

Appendix C: Loan agreement

Loans out

Borrower details

Address:

Contact:

Telephone:

Email:

Object details

Description:

Current insurance valuation:

Loan details

Purpose of loan:

Date of loan:

Due date of return/renewal:

Loan reference number:

Conditions applying to the loan are listed overleaf and circled below:

1a 1b 1c 1d 2 3 4 5 6 7 8 9 10 11 12 13 14...100-150..... lux max
15 16

17.....16-26..... deg C 18...40-50..... %rH 19 20 21 22 23 24 25 26 27 28 29
30 31 32

I agree to accept the objects described above on loan from the *Library* under the conditions specified:

Signature Name.....Date.....

The *Library* agrees to lend the objects described above on acceptance by the borrower of the stated conditions.

Signature Name.....Date.....

Conditions of loan

INSURANCE

The *Library* will apply one of the conditions 1a – 1d

- 1a The borrower undertakes to take out an insurance policy to cover all risks, loss or damage to the object(s) to the value stated on the loan form. Documentary proof of insurance will be provided before the object(s) can be released by the *Library*. The value will be renewed at the borrower's expense if required.
- 1b The borrower will provide an approved indemnity for the object(s) to the value stated on the loan form. This value will be reviewed at the borrower's expense.
- 1c The *Library* will arrange insurance for the object(s) & the borrower will be invoiced accordingly.
- 1d No indemnity/insurance arrangements are required.
- 2 The *Library* reserves the right to withdraw the object(s) at any time during the period of the loan. In particular, failure to comply with the conditions of the loan may result in the object(s) being recalled.
- 3 The object(s) will only be used for the purpose specified on this form.
- 4 Under no circumstances will the object(s) be used for commercial purposes.
- 5 Reasonable access to object(s) on loan will be provided to the *Library's* staff by the borrower.
- 6 The borrower will ensure that the object(s) are maintained in a suitable condition for display. Dusting & other light cleaning may be carried out but no repairs, restoration, conservation or extensive cleaning may be undertaken without the prior written permission of the *Library*.
- 7 The *Library* will be informed immediately of the loss of the object(s) or of any damage to them of whatever nature including any such discovered on first receipt/delivery. The borrower will be liable for conservation/repair costs arising from loss or damage.
- 8 The borrower will not lend the object(s) to any third party nor will the object(s) be removed from the specified display premises without the prior written permission of the *Library*.
- 9 The object(s) will not be released until the *Library* is satisfied with the standard of packing & protection of them on any vehicle. For the objects' return, the borrower will provide packing identical to that used on the outward journey. The cost of all the packing & transport will be borne by the borrower.

- 10 An acknowledgement to the *Library* will be given in all exhibition labels & catalogue entries for the object(s). A copy of any published exhibition catalogue which includes entries for the object(s) will be provided for the *Library*.
- 11 Photographs & other reproductions of the object(s) will not be made for commercial purposes by the borrower or other bodies/persons without prior written permission of the *Library*. Photographs of the object(s) may be taken by the borrower for record purposes, for catalogue purposes and for exhibition publicity unless condition 31 applies. The *Library* has no objection to photographs being taken by visitors for private study unless condition 32 applies.

SECURITY AND ENVIRONMENT

Any of the following conditions may be applied. For conditions 12-16, details will be specified for each loan.

- 12 The object(s) will be exhibited in a secure building in areas adequately protected against extremes of temperature, humidity, light & vibration. Adequate protective measures will be taken against pollution, flood, fire & accidental risks.
- 13 There should be no food or drink in the vicinity of the object(s).
- 14 Light levels will not exceed the specified level.
- 15 Ultraviolet light will be excluded.
- 16 Daylight will be excluded.
- 17 The temperature will be kept within the specified range.
- 18 The relative humidity will be maintained within the specified range.
- 19 Specialised materials will be required for the mounting & display of the object(s).
- 20 The object(s) will be under regular surveillance by the borrower whilst open to the public.
- 21 The object(s) will be under regular surveillance by the borrower 24 hours per day.
- 22 The object(s) will in an area monitored by an alarm system whilst closed to the public.
- 23 The object(s) will be exhibited behind a barrier & out of reach of the public.
- 24 The object(s) will be exhibited in a locked showcase.
- 25 The object(s) will travel in a fitted packing case to be made at the borrower's expense.

- 26 The *Library* or nominated representative will accompany the objects on outward & return journeys or will attend upon their receipt & dispatch at the borrower's premises.
- 27 The *Library* or nominated representative will accompany the objects at all times during the period of loan.
- 28 The objects are to be handled as little as possible.
- 29 The objects must only be handled by the *Library's* staff.
- 30 All photographic material must be hand-carried in the pressurised cabin of an aircraft.
- 31 No photographs may be taken by the borrower.
- 32 No photographs may be taken by visitors.

Condition rating:

Very good	Good	Fair	Poor	Very poor
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Assessed by:

Date:

Reason for assessment:

Appendix D: Official receipt: loan deposit

Loan reference: Borrower: Address: Tel/email: Loan coordinator for borrower:
Exhibition title: Dates:
Objects:

On behalf of the Borrower, I acknowledge the receipt of the object(s) listed from the *Library*. I certify that the condition report sent with the object(s) represents their condition at the time of receipt.

Signature.....Official title..... Date.....

Borrower's representative