

PRINCIPLES FOR LENDING AND BORROWING

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PRINCIPLES AND GUIDE TO LENDING AND BORROWING

INTRODUCTION

The rich and diverse collections of the UK's museums and galleries have the capacity to inspire, excite, educate and bring people together. Lending and borrowing enables these collections to be accessed and enjoyed by diverse audiences, creates opportunities for new research and interpretations, and promotes collections as a valuable public resource.

A partnership approach to lending and borrowing can help build long term collaboration and maximise the impact for the public and organisations involved. Taking the time to understand the process from both sides helps loans to proceed more smoothly and effectively.

As museums reopen following the UK lockdowns, many are under pressure from reduced resources. However, the national and regional museums whose leaders form the National Museum Directors' Council are committed to lending as widely as possible to support the sector during this critical period of recovery, to ensure that as many people as possible across the UK can access the UK's collections.

ABOUT THIS DOCUMENT

This practical guide takes you through the lending and borrowing process and is designed to be relevant for the variety of organisations engaged in loans-based activities. The structure of the document looks first at Principles for Lending and then Principles for Borrowing, section 3 provides a fuller guide through the process with a Guide to Lending and Borrowing, and finally section 4 shows some best practice case studies.

The Principles and Guide aim to address sector demand for an ease and openness to lending and borrowing in the UK and are informed by Arts Council England's 'Ready to Borrow' programme, the Weston Loan Programme with Art Fund and TEG's *'Preparing to Borrow' programme and Lending and Borrowing Experiences Survey Report* (2017).

The Principles were drafted following a series of workshops in 2019 with the assistance of a Working Group (see page 29). This Guide updates NMDC's *Loans Between National and Non-national Museums: Standards and Practical Guidelines* (2003) and responds to the *Mendoza Review: an independent review of museums in England* and the *Strategic Review of DCMS Sponsored Museums* (both 2017). These reports recognised the wide-reaching value of lending and borrowing between national and non-national museums and called for national museums to provide a more supportive environment for lending and borrowing in the UK.

01

PRINCIPLES FOR LENDING



Ceramics Gallery, National Museum of Scotland.
Photo: Ruth Armstrong © National Museums Scotland

To encourage the growth of good lending and borrowing in the UK, NMDC members agree to the following commitments. In doing so, they hope to encourage the wider museum community to adopt a clear, helpful and generous approach to lending.

We will:

LEND UNLESS THERE IS A COMPELLING REASON NOT TO

If it is not possible to lend, clearly explain the reasons and offer alternatives if you can.

PROVIDE CLEAR INFORMATION FOR POTENTIAL BORROWERS

Borrowers will typically begin by researching your institution's process online - make sure you have an up-to-date loans web page. This should include:

- › A clear point of contact for enquiring about loans
- › Where available, links to a searchable collections database
- › Sign-posting to other sources of information about the collection e.g. on-site research facilities, publications,

curatorial contacts, information about collections held on external databases or websites e.g. Art UK

- › Your loans policy and process, including timescales for informal enquiry and formal notice period, conditions for borrowing and rationale for decision making.

PRAGMATICALLY ADDRESS DELIVERY, DISPLAY AND ENVIRONMENTAL REQUIREMENTS

- › These may include mounting, crating, couriers, transportation, environmental conditions, security etc.
- › Provide the information necessary to maintain the safety of the object as soon as possible to help avoid unexpected costs for the borrower.
- › Be pragmatic about lending where the nature of the collection allows.
- › Take a risk-managed approach to lending where the loan conditions - timescale, environment, security - allow and within the resources available.

USE COURIERS ONLY AS NECESSARY

- › Only require a courier (including virtual couriers) when this is genuinely essential. When used, explain why you're sending a courier, or using a virtual courier, and share them wherever possible.

- › Ensure couriers are appropriately trained to deal with the object(s) on loan.
- › Communicate what their role is to the borrowing institution - will they be delivering the object or assisting with installation (in person or remotely)?

CHARGE COSTS ON A NOT FOR PROFIT BASIS

- › Provide the borrower with a transparent overview of the related costs as soon as possible.
- › National museums will not charge a fee for the loan itself to other UK museums (though they may charge some or all of the costs incurred in making the loan).
- › Costs should be kept to a minimum. For example, conserve to the level required for exhibition and provide options for glazing, crating, transport and couriering.

- › In particular, work with the borrower to identify transportation and other services that meet the standard and operate from their area.
- › Where costs are passed on, this should be on a cost-recovery basis.

MAKE THE MOST OF WORKING IN PARTNERSHIP

- › Help borrowers maximise the impact of a loan. For example, provide access to marketing resources such as images.

// NMDC MEMBERS WANT TO ENCOURAGE THE GROWTH OF GOOD LENDING AND BORROWING IN THE UK

Looking at laser scans of carved stones at National Museum of Scotland. Photo: Neil Hanna © National Museums Scotland



PRINCIPLES FOR BORROWING



Learning about the Staffordshire Hoard.
Photo: Andy Stammers © Birmingham Museums Trust

Loans between museum, galleries and other cultural organisations are partnerships. These partnerships are most effective when both parties consider the perspective of the other, collaborate to meet each other's objectives and pragmatically share time and resources. In the spirit of partnership, those entering into an agreement to borrow are asked to:

FIND THE MOST SUITABLE OBJECT AVAILABLE

- › Undertake thorough research of potential objects to fit your subject.
- › Don't assume that the best object for your purposes will be in a national collection - explore a wide variety of lenders.
- › Don't assume that the best object for your purposes is one that is on display, explore the museum's database and talk to curators at the museum if possible, to understand what is in store.
- › If you approach an institution for a 'star' object, the loan may need a longer lead in time or not be possible if the object is on display elsewhere. However, if this is the ideal object for your work, don't be afraid to ask.

- › Be flexible: if your ideal object is not available, work with the lending institution to identify an alternative.

LEAVE ENOUGH LEAD-IN TIME

- › The amount of time it takes to borrow an object varies between institutions - your schedule may differ from that of the lending body.
- › Therefore, it is important to make informal enquiries as early as possible. For example, if you need to submit a formal loan request 12 months in advance of borrowing, we recommend that you begin a conversation 15 months in advance.
- › Make sure you are speaking to the right person in the right department, who can give you the most accurate advice.

READ THE DOCUMENTS CAREFULLY SO YOU ARE FULLY AWARE OF THE TERMS, CONDITIONS AND COSTS OF BORROWING

- › The conditions of borrowing are not a formality and it is crucial to digest them properly to make sure your institution can meet the standard. If they are not provided early in the process, you can either find an institution's conditions online or ask the lender.

- › If some conditions are problematic, don't be afraid to start a conversation about workarounds or alternatives with the lender. You can also seek clarification if anything in the terms is unclear.
- › These conditions may also indicate the costs of borrowing – including expenditure on conservation, mounting, crating, framing, glazing, couriers and transportation. Again, good communication is important: let the lender know as soon as possible if you can afford these costs and would like to go ahead.

MAKING A STRONG FORMAL APPLICATION

If your initial research and enquiries seem promising, make a strong case for borrowing in your formal application. Points to emphasise include:

- › Why this object is most suitable for your exhibition or research i.e. what is unique, timely and/or exciting about the opportunity.
- › The outcomes that may benefit the lender, as well as yourselves e.g. research, publications, researching new audiences, contributing to their KPIs.
- › All of the practical and contextual information that will inform the decision-making process e.g. exhibition title, dates, audience, other exhibits etc.

- › Ensure you provide the lender with all the information they require in a timely way e.g. facilities, security and environmental information, display case details, designs for the exhibition, other objects that will be displayed, your timetable etc.

BE A GOOD PARTNER

- › Be open, flexible and pragmatic in your approach to borrowing - remember potential lenders may also be under pressure and needing to manage staff time and resources.
- › Work together to find solutions. For example, you may work with the lender to identify transport which meets the criteria and is available in your area.
- › Use the opportunity of the loan for mutual publicity. Ensure you provide appropriate credit and acknowledgement of the loan, and give the lender time to review publicity materials.



Conservation. Photo: Stewart Attwood
© National Museums Scotland

These principles were written following a series of workshops bringing together registrars from museums of all sizes, convened by the National Museum Directors' Council and the Touring Exhibitions Group (see page 29 for further information).

GUIDE TO LENDING AND BORROWING



*Egyptian Gallery, Birmingham Museum & Art Gallery.
Photo: Andy Stammers © Birmingham Museums Trust*

RESEARCH

FIND THE MOST SUITABLE OBJECT AVAILABLE

- › Undertake thorough research of potential objects to fit your subject.
- › Don't assume that the best object for your purposes will be in a national collection - explore a wide variety of lenders.
- › Don't assume that the best object for your purposes is one that is on display, explore the museum's database and talk to curators at the museum if possible, to understand what is in store.
- › If you approach an institution for a 'star' object, the loan may need a longer lead in time or not be possible if the object is on display elsewhere. However, if this is the ideal object for your work, don't be afraid to ask.
- › Be flexible: if your ideal object is not available, work with the lending institution to identify an alternative.

It can be difficult to discover what objects are available and in which collections; museums are continually adding more collections information to their websites to make this process easier.

Whether looking offline or online, research will always be necessary to find the right object.

Consider all the different types of collections that may hold the kind of object you're looking for. It might not always be a national or even a large regional museum that has what you need but one of the other incredible collections up and down the country. Use your personal network, that of your organisation and other sector networks to help you with your research.

National museums will always try to support those wishing to research objects, but their time is limited too, so it is important to take this into consideration, especially if you are a first-time borrower. Don't be intimidated, everyone has been there, just make a call or arrange a visit and start the process.

Try to find out as much as possible about the object you wish to borrow. Visit the lender to view the object to assess its suitability, not only from a curatorial perspective, but also from a practical point of view. Seeing the object at the research stage will give you a clearer idea of the condition of the object, as well as any conservation, display, packing and transport requirements.

Borrowers should conduct due diligence when considering a loan. A loan should not proceed if the lender does not hold a valid title for the object. Nor if there is any suspicion that the object was wrongly taken during a time of conflict, stolen or illicitly exported or traded in ways not explicitly allowed by treaties or other agreements.

Evidence of lawful ownership in a country is not necessarily a valid title. Due diligence should establish the full history of the object from the time of its discovery or production. Before acquiring an object,

museums should carry out thorough due diligence checks and make this available on request to potential lenders.

Think about the loans process starting from the early research stage, rather than from when you make the formal loan request. Don't forget to build research time and costs¹ into your exhibition schedule and budget from the start.

To support this, national museums will provide clear information for potential borrowers.

SUBJECT SPECIALIST NETWORKS

There are some organisations and networks that can specifically help with collections research. Subject Specialist Networks can be a useful place to start.

Subject Specialist Networks (SSN) offer advice and guidance about collections, acquisitions, preservation, access and research on a specific subject area.

They provide opportunities to network and provide professional advice, information, and expertise on a range of subject areas. There are many such SSNs in existence and you can contact them for support and guidance relating to your own activity. Some SSNs focus specifically on providing advice, others have a wider role which include advocacy, research, and other key developmental activity.

There are over 40 SSNs covering a wide variety of subjects. You can view the full list at www.subjectspecialistnetworks.org.uk

¹ Jonathan Ruffer curatorial grants from the Art Fund provide funding for travel and other practical costs, to help curators undertake collections and exhibition research projects in the UK or internationally.

<https://www.artfund.org/supporting-museums/programmes/jonathan-ruffer-curatorial-grants>

PLANNING

LEAVE ENOUGH LEAD IN TIME

- ▶ The amount of time it takes to borrow an object varies between institutions - your schedule may differ from that of the lending body.
- ▶ Therefore, it is important to make informal enquiries as early as possible. For example, if you need to submit a formal loan request 12 months in advance of borrowing, we recommend that you begin a conversation 15 months in advance.
- ▶ Make sure you are speaking to the right person in the right department, who can give you the most accurate advice.

Lending and borrowing should be treated as a partnership activity and the more preparatory work you can do, the more successful the loan is likely to be. Like with any partnership, it helps to develop the lender and borrower relationship as early as possible. Whether you immediately request a loan or wait three or more years before needing to request one, having this relationship in place will help both organisations long-term.

Most museums will signpost one central email contact for loan enquiries on their website. Some have a dedicated loans email address, but not all do, so always start with the collections and loans pages of the website to find the right information. If you can't find contact details online, call the museum and ask to speak to the loans out registrar or curator of the collection from which you wish to borrow.

Many national museums also have a national partnership lead who may act as a gateway to making a loan request.

Before you submit a formal loan request, it is essential to speak with the lender's curator and loans registrar. Between them they can share expert knowledge and give practical advice about the object you wish to borrow.

There can be other factors that affect the notice period for your loan request. 'Star objects', objects on display, a request for a large number of objects, or borrowing from a museum undertaking a major capital project or storage move can all mean a longer notice period is required. The seasonal exhibition cycle can lead to busy periods for loan requests. Make sure to conduct ample research into factors that may cause disruptions, though recent events including the UK's exit from the European Union and the pandemic have shown that there are other possible unforeseen circumstances that can impact lending schedules.

If an object cannot be lent, the lender should clearly explain the reasons why and they might be able to suggest an alternative. It will save you time if you know early on that an object is not available for loan.

Remember, a loan is not confirmed until you have this in writing in response to your formal loan request.

To support lending, national museums will lend unless there is a compelling reason not to.

TERMS, CONDITIONS AND COSTS

READ THE DOCUMENTS CAREFULLY SO YOU ARE FULLY AWARE OF THE TERMS, CONDITIONS AND COSTS OF BORROWING

- › The conditions of borrowing are not a formality and it is crucial to digest them properly and make sure your institution can meet the standard. If they are not provided early in the process you can either find an institution's conditions online or ask the lender.
- › If some conditions are problematic, don't be afraid to start a conversation about workarounds or alternatives with the lender. You can also seek clarification if anything in the terms is unclear.
- › These conditions may also indicate the costs of borrowing – including expenditure on conservation, mounting, crating, framing, glazing, couriers and transportation. Again, good communication is important: let the lender know as soon as possible if you can afford these costs and would like to go ahead.

A lot of information can be found online, though the volume of it can be overwhelming. When preparing to make a loan request, always read the available information as it's there to help. Take the time to familiarise yourself with the policy and procedures of the lender.

There are recognised differences in the way that individual museums manage their loans processes, but each museum operates a system that works for their operational model and staff. To help guide borrowers in the right direction, museums should ensure that their loans policies, processes for borrowing and rationale for decision making are clearly outlined at the start of the process.

There are some minimum sector standards that the borrower must meet when borrowing from national museums to fulfil Government Indemnity Scheme (GIS) requirements (see box below). These can be used as an aspirational standard for any loan. Whatever the loan conditions and standards, a lender should always articulate as early as possible what these are and how they apply to a specific loan object(s) to avoid any confusion or unexpected costs further down the line.

Museums now need to seriously consider the environmental impact of their work, including borrowing and lending. Many museums are moving towards reducing waste, using sustainable exhibition build materials, sharing or recycling unwanted exhibition items and materials, and using virtual couriers where feasible. In 2015 the Bizot Group (a group of the world's leading museums) agreed the Bizot Green Protocol, which provides standards and guidelines for the sector, particularly around environmental conditions for objects. Reducing the environmental impact of lending and borrowing can have the added bonus of reducing the exhibition and loan costs.



Museum Collection Centre Open Day, September 2019. Photo: David Rowan © Birmingham Museums Trust

COSTS

Although national museums² do not charge administration fees for loans, they, and many other museums, may need to recover the loan preparation costs from the borrower. Even if a loan is offered completely free of charge, museums may wish to capture the 'cost' involved to demonstrate the financial impact and support-in-kind offered through the lending and borrowing activity. If the types of costs are not clearly stated in the museum's loan policy, the borrower should ask. Having an idea of costs associated with a loan is essential for budget preparation, planning and funding applications. Awareness of the loan costs at an early stage can help the lender and borrower avoid wasting time and resources. Transparency about costs is key for developing a good working relationship during the loans process and beyond.

The following factors may affect the cost to the borrower:

- › preparation of a conservation assessment and condition report
- › conservation and preparation costs (time, materials etc.)
- › photography and reproduction costs
- › valuations and appraisals
- › indemnity / insurance
- › packing (time and materials)
- › crate hire and storage fees
- › transport
- › couriers and installation experts (time, travel, accommodation, subsistence)
- › environmental and security requirements
- › installation costs, including special display requirements, fixtures and fittings and hire of specialist equipment.

INSURANCE

The borrower usually arranges and pays for the insurance for a loan, ensuring it provides 'nail-to-nail' cover and meets the requirements stipulated by the lender.

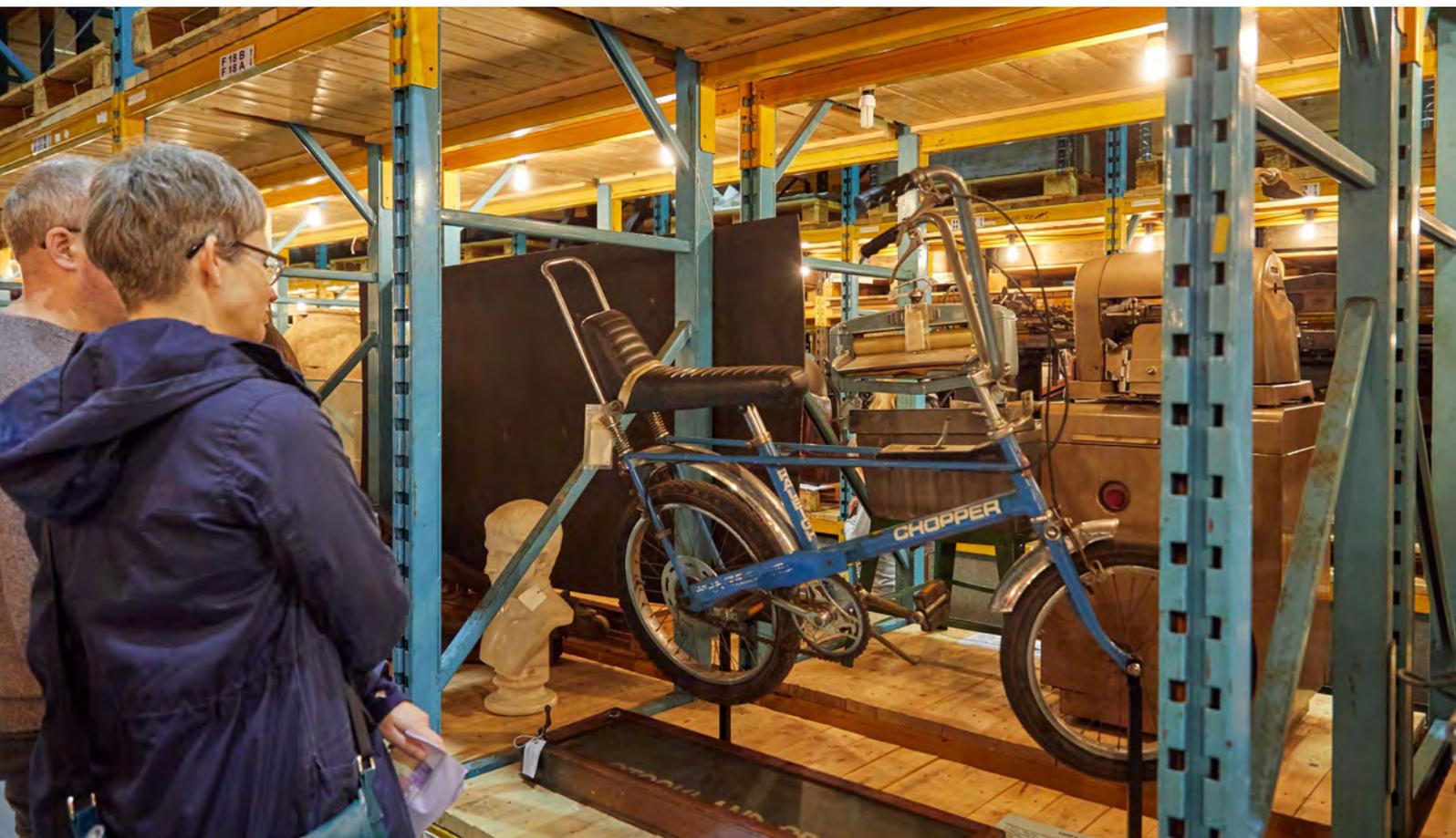
The Government Indemnity Scheme (GIS) (see box on page 14) is a cost-effective alternative to commercial insurance for loans from non-national museums and galleries, and private lenders in the UK and abroad. National collections are not covered by GIS. When National collection objects are loaned out to another UK National Institution they do so at their own (lenders) risk or if an approved Non National or Designated borrower, the borrowing venue covers the minimum liability. See the GIS guidelines for minimum liability arrangements.

Carefully read the GIS guidelines on eligibility and how to apply, and

remember to leave enough time for the application process; non-national museums should apply at least three months in advance and national museums at least two weeks in advance of the loan itself.

Commercial insurance can be quicker to arrange than GIS, though most insurance companies will expect GIS conditions to be met in order to minimise risk, dependent on the type of object and its value. Some borrowers, particularly local authority museums, may be required to obtain insurance through their governing bodies. In either case, the borrower should be prepared to provide proof of adequate insurance cover in advance of the loan being confirmed or proceeding and the lender should scrutinise the insurance premium documents provided by the borrower to make sure the object is appropriately covered for the entire period of the loan, in transit and in situ.

Staffordshire Hoard Gallery, Birmingham Museum & Art Gallery. Photo: Andy Stammers © Birmingham Museums Trust



COURIERS

Where possible, museums will presume against using couriers to accompany loans, but sometimes a courier is required. In such cases, the lender should clearly demonstrate why a courier is needed and ensure the courier has the required information, experience and authority. Where possible, lenders and borrowers should work together to share couriers for multiple objects or consider other options such as bookend installation, virtual couriers or incorporating other digital technology to monitor key parts of the transit.

A courier accompanying a loan can also present an opportunity for learning and knowledge exchange; another way of extending the partnership approach to lending and borrowing.

To support this, national museums will pragmatically address delivery, display and environmental requirements, use couriers only as necessary, and charge costs on a not for profit basis.



Learning about the Staffordshire Hoard.
Photo: Andy Stammers © Birmingham Museums Trust

GOVERNMENT INDEMNITY SCHEME (GIS) GUIDELINES

The scheme offers an alternative to the cost of commercial insurance. It covers loans from private lenders in the UK and abroad, as well as loans from UK non-national museums and galleries. National collections are not covered by GIS. When National collection objects are loaned out to another UK National Institution they do so at their own (lenders) risk or if an approved Non National or Designated borrower, the borrowing venue covers the minimum liability. See the GIS guidelines for minimum liability arrangements.

To benefit from the scheme, borrowing organisations are subject to a thorough security risk assessment of the transport, venue and exhibition area, as well as environmental approval for the exhibition space or research facilities.

It is a requirement that for indemnity to be given, the loan must be made in accordance with conditions approved by government. These conditions are set out in guidelines available to download in PDF format from the Arts Council England (ACE) website.

www.artscouncil.org.uk/protecting-cultural-objects/government-indemnity-scheme

MAKING A LOAN REQUEST AND THE LOAN PROCESS

MAKING A STRONG FORMAL APPLICATION

If your initial research and enquiries seem promising, make a strong case for borrowing in your formal application.

Points to emphasise include:

- ▶ Why this object is most suitable for your exhibition or research i.e. what is unique, timely and/or exciting about the opportunity.
- ▶ The outcomes that may benefit the lender, as well as yourselves e.g. research, publications, researching new audiences, contributing to their KPIs.
- ▶ All of the practical and contextual information that will inform the decision-making process e.g. exhibition title, dates, audience, other exhibits etc.
- ▶ Ensure you provide the lender with all the information they require in a timely way e.g. facilities, security and environmental information, display case details, designs for the exhibition, other objects that will be displayed, your timetable etc.



MiniBrum at Thinktank, Birmingham Science Museum.
Photo: Andy Stammers © Birmingham Museums Trust

Borrowers need to submit a formal loan request, following their informal discussions with the lender. Museums should provide clear information to guide this process, detailing the procedure for applying for a loan, the conditions for borrowing and the rationale for decision making. Where applicable they should also advise dates of board or committee meetings where decisions will be expected to enable forward planning.

It's always better to make an early start – especially as museum sign-off processes for approving loans differ from place to place, so the more information you can obtain and closer ties you can establish early on the better.

Check who the formal loan request should be sent to. This may be the director, a curator, a registrar, or a generic loans email address, and will vary from museum to museum. If it is not clear who should receive the formal loan request, ask.

Making a compelling case for your loan is an important part of this process and easy to overlook if you are focussed on providing the object, exhibition and practical information to the lender. Put yourself in the lender's shoes. Create a persuasive argument, not only about the impact of the loan on your own organisation and audiences, but also how the loan will benefit the lender and help them achieve their objectives for sharing collections and working in partnership.

In addition to your case for the loan, the lender will expect some standard information about the object you wish to borrow, where and how it will be displayed, and for how long.

You should include the following information in your formal loan request:

- › borrower/exhibition organiser's name, address and contact details
- › complete object information, including the acquisition number or other unique identifier, for the object you wish to borrow
- › exhibition title, dates and venue
- › brief curatorial summary or scope of the exhibition
- › reasons for borrowing the object - why it is relevant and important to the exhibition or display
- › type of loan – temporary, long-term, touring exhibition
- › details of any accompanying exhibition publication
- › who will oversee the loan processes at each stage?
- › proposed transport company and arrangements
- › proposed insurance company and coverage
- › a completed and up to date Facilities Report and, if relevant to the loan, completed Security Supplement and Display Case supplement
- › if the loan is for a touring exhibition, details of the exhibition tour and arrangements (see page 20).

Including the required information in the formal loan request will make it easier for the lender to consider and turn around your loan request as quickly as possible.

You may be asked to submit a complete and up-to-date UKRG Facilities Report as part of the loan request or shortly after.

If applicable to the loan, a completed UKRG Security Supplement and UKRG Display Case Supplement may also be requested. Every organisation involved in borrowing should keep up to date copies of these documents on file and they should be reviewed at least every three years, and always after any building work or changes to on-site security, environment and display conditions. Blank copies of these documents can be obtained from the UK Registrar's Group (see box on page 17).

You will receive a formal written response (by post or email) to your loan request. Be aware that this may take some time because of internal processes. For example, loans committees or Trustees may only meet quarterly to review loan requests.

If the loan is agreed, you will receive an official response, which may also include a loan agreement or contract. The loan agreement or contract should set out all of the lender's terms and conditions for the loan, including the borrower's responsibilities and likely costs. The specific security, environmental, display and transport requirements should be clearly stated in the loan agreement.

The loan process requires a commitment from both the lender and borrower to work together, and information will be shared back and forth for the duration of the loan. The Collections Trust has produced a visual workflow document to illustrate the process and direction of information flow (see Further Information on page 26).

Once the loan has been agreed, the lender and borrower will need to agree on how all aspects of the loan will be managed, including:

- › Documentation, paperwork, communication schedule
- › Costs
- › Facilities
- › Security
- › Environment
- › Display
- › Condition report
- › Photography and reproduction
- › Insurance or Indemnity
- › Packing
- › Transport
- › Storage
- › Couriers
- › Installation
- › Maintenance and monitoring
- › Deinstallation
- › Exhibition tour (if applicable)
- › Return of the loan

IF YOUR REQUEST IS REJECTED

Museums will be pragmatic about lending and will try to accommodate loans wherever possible. However, if they are unable to lend, museums should explain the reasons for refusing an application and offer alternatives where available. Decisions to turn down loan requests are not made lightly and will often have been taken at the highest level.

The lender may also be able to make introductions to or suggestions of other organisations that may have similar objects available, so it's always helpful to develop a good relationship with the lending organisation. There may be opportunities to work together in the future.

There are a range of other paths available to pursue if the object requested is not available, many museums now offer digital copies of objects which may be suitable to certain displays.

UK REGISTRARS GROUP (UKRG)

The UK Registrars Group (UKRG) provides a forum for exchanging ideas and expertise between registrars, collection managers and other museum professionals. The group strives to establish and promote standards of good professional practice through publications and seminars and to support national and international standards in relevant fields of work. Particular emphasis is given to documentation and records, physical care, loans and exhibition logistics and cultural sector legislation.

Many useful resources related to the loans process are available on the UKRG website, including the UKRG Facilities Report, Security and Display Case Supplements (available to non-members as PDFs only).

www.ukregistrarsgroup.org

COMMUNICATION AND WORKING IN PARTNERSHIP

BE A GOOD PARTNER

- › Be open, flexible and pragmatic in your approach to borrowing - remember potential lenders may also be under pressure and needing to manage staff time and resources.
- › Work together to find solutions. For example, you may work with the lender to identify transport which meets the criteria and is available in your area.
- › Use the opportunity of the loan for mutual publicity. Ensure you provide appropriate credit and acknowledgement of the loan, and give the lender time to review publicity materials.

Regular and clear communication is the foundation of a successful lending and borrowing experience. Whether you are the lender or the borrower, taking the time to understand the point of view of the other party, and the potential pressures they may be under, will enable you to work together to solve any issues as they arise.

As the borrower, keep the lender up to date on any changes to staff contacts, exhibition schedules, design and display decisions etc.

As the lender, ensure that all of the relevant departments and staff have been consulted about the loan before communicating the decision or loan requirements to the borrower.

Misunderstandings on either side can potentially jeopardise the loan and may put the organisations at reputational risk.

Lending and borrowing should be undertaken as a partnership activity, not a transactional exchange. Treating it as a partnership will encourage museums to feel empowered to work with others, no matter what the scale of their organisation.

Borrowing a major object of interest, whether from a national or a non-national museum can be a great opportunity to engage new audiences, place a spotlight on a collection, and cross-promote with the lending organisation.

Loans can provide opportunities to build media plans around the objects in an exhibition, perhaps highlighting loan objects in a way that hasn't been done before by the lender. These activities can give new exposure and visibility to objects, allowing new stories to be told and raising the profile of both partner museums.

Lenders can also use loans as an opportunity to focus on the object in question, if there is no existing imagery of the object this could be a chance to take new photographs, and similarly, for museums in the process of digitising their collections, a loan could be an opportunity to digitise.

Working together where opportunities arise, for example, around marketing plans can be an excellent way of cross promotion for both lender and borrower, so take advantage where possible of working in partnership.



Birmingham Museum & Art Gallery © Birmingham Museums Trust

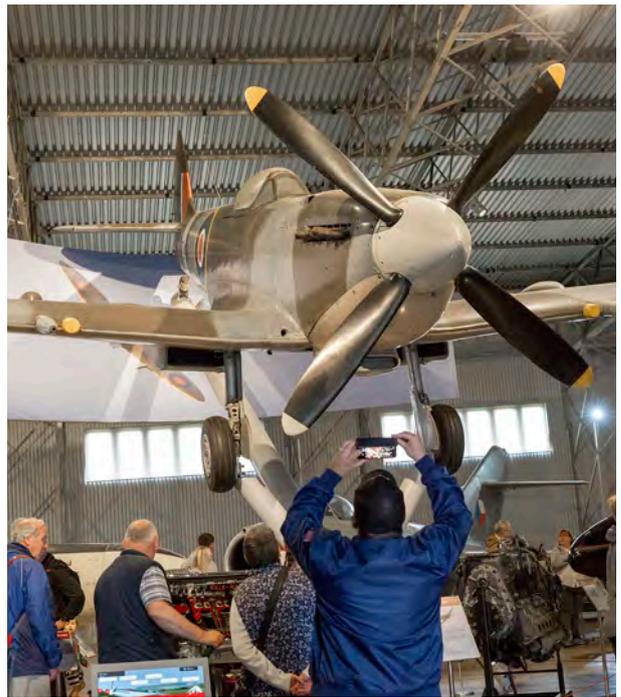
LONG-TERM LOANS

The majority of loans between organisations are short-term, usually for temporary exhibitions or displays. Long-term loans may be agreed for 3 - 5 years or even longer but they should not be indefinite. The loan should be reviewed periodically and renewed if the lender and borrower agree there is still a clear purpose and benefit to continue the loan.

Long-term loans will often form part of an organisation's permanent displays or contribute to research or reinterpretation of a collection. They may even be listed on the borrower's collection catalogue or website.

The process for a long-term loan is broadly the same but there are some additional considerations:

- will the object be used for any purpose other than display during the loan period, such as research, education programmes etc.?
- what arrangements are in place for the lender and borrower to monitor the object on loan, such as site visits and periodic condition checking, and who will cover any associated costs?
- how will the object be labelled, not only the public object label but also the object itself?
- is the loan documentation (paper and electronic) clear so the loan can be easily identified, the terms and conditions adhered to, and the loan renewed as appropriate, even after many years and several staff changes?
- what is the process, and who will cover the associated costs, if the long-term object is requested for loan by a third-party?



National Museum of Flight. Photo: Ruth Armstrong
© National Museums Scotland

TOURING EXHIBITIONS

Touring exhibitions are one way for organisations to extend the reach of a temporary exhibition, display or loan. Often the touring exhibition will first be displayed at the organiser's or one of its partner's premises before touring nationally or internationally.

For loans that subsequently tour there are additional considerations:

- ▶ who is the tour organiser or, in a consortium, who is the lead partner and has the organiser/lead partner provided the lender with all of the tour information – tour venues, dates, transport, display and insurance arrangements etc.?
 - ▶ will the tour organiser or lead partner be responsible for the touring exhibition preparation and management, and therefore be responsible for any loans to the exhibition, including the costs, even if these are subsequently passed on to the tour venues?
 - ▶ will the lender require each tour venue to sign a loan agreement, or how will the tour organiser ensure that each venue meets the lender's loan terms and conditions?
 - ▶ what insurance arrangements are in place for the tour? Is responsibility clearly defined and appropriate cover in place for each leg of the tour, in transit and on display?
 - ▶ does the lender require a courier to oversee each installation and deinstallation, or can couriers be shared with other lenders, or the loan be overseen by the organiser?
- ▶ if there are any gaps in the tour schedule, what storage arrangements are in place? Will the lender expect the object to be returned to them if there is a gap or more than a few weeks, and who will pay the associated costs?
 - ▶ if the exhibition tours internationally, are additional and appropriate measures in place for managing and monitoring any loans?
 - ▶ if the exhibition tours internationally, are there potential extra costs or time considerations as a result of border changes post-Brexit?

Where possible, the tour organiser should draw up and manage all contracts and loans for the tour, rather than lenders having individual agreements with each tour venue. This means the touring organiser takes on responsibility for the exhibition content, including objects on loan, but it will help keep communication, administration and responsibility clearer for all involved.

The Manual of Touring Exhibitions by the Touring Exhibitions Group (TEG) covers all aspects of organising touring exhibitions (see Further Information on page 27).



East Asia Gallery, National Museum of Scotland.
Photo: Andy Catlin © National Museums Scotland



Defaid/Sheep at Ceredigion Museum, 2019 © Ceredigion Museum

SHEEP EXHIBITION AT CEREDIGION MUSEUM, ABERYSTWYTH, WALES

This case study from Ceredigion Museum follows the process of borrowing from a national museum for the first time, following training, support and funding from three programmes designed to encourage lending and borrowing.

The Sheep exhibition was a project designed to create a dialogue around the upland landscape of Mid-Wales. It took place at [Ceredigion Museum](#) from April to June 2019. The history, heritage and culture of a sheep farming community, and in particular the ecology and future uses of the land in relation to current discussions about land management and the future of farming in Wales, was explored through exhibits from the museum's collection, work by local artists (including new commissions), supported by a small number of national loans. The exhibition was accompanied by a symposium and engagement work with local communities.

Ceredigion Museum borrowed five 2D works from Tate for the exhibition. The loans, and accompanying programme to maximise their impact, were supported

with funding from the [Weston Loan Programme](#) with [Art Fund](#) and a [Ferryman Project bursary](#) from Tate. Funding from the [Arts Council of Wales](#) supported the work with local artists and the farming community.

Ceredigion Museum had long-held ambitions to bring in major loans to enhance its temporary exhibitions but had lacked the facilities and confidence to request loans from national museums. The desire to borrow nationally significant art works for 'Sheep' was partly for the purpose of audience development. However, the increased level of security for the building and purchase of a high security case also allows the museum to continue to borrow in the future - offering opportunities to enhance collections knowledge and interpretation by borrowing artefacts, particularly archaeological 'treasures' that were originally from the county.

The exhibition curator, Alice Briggs, had been working on the exhibition idea and concept for some time but it was attending a TEG Preparing to Borrow workshop, where she heard about the Weston Loan Programme with Art Fund and spoke with William Brown (National Security Advisor), and a Tate workshop on sharing works of art, that gave her the confidence to take her idea forward.



Defaid/Sheep at Ceredigion Museum, 2019 © Ceredigion Museum

The workshops also enabled Alice to make contact with Tate and learn about its loans policy, something that had been difficult to do online. Particularly helpful was the chance to attend a two-day training session with Tate registrars as part of the Ferryman Project after which the museum was able to apply for additional funds to support the loans. Hearing national museums express a wish to lend and do all they can to facilitate loans for regional, non-national museums helped change the long-held perception that borrowing from national museums is difficult.

Alice originally wanted to borrow Tate's [Away from the Flock](#) by Damien Hirst but it was already committed to loan elsewhere. Even if it had been available, the loan costs would have been prohibitive. After some initial online collections research, Tate registrars helped

Alice identify a number of relevant works for loan. A small number of framed 2D works were requested, which were easier to manage. Loans by a major international artist like Joseph Boyce and renowned British artist Henry Moore helped the museum draw in new and repeat local visitors, including those interested in contemporary art.

Once the loan agreement was signed, the process ran smoothly and quickly. However, although the official loan request was submitted nine months in advance of the exhibition opening (and the exhibition dates were pushed back to accommodate this), the response and information sharing took some time. By the time the loan agreement was signed, it was only six months before the exhibition opening. For a first-time borrower, it wasn't always clear which stages of the loans process the lead-in times applied to.

The works had to be transported to Ceredigion Museum using GIS standard transport, which meant the museum's local transport agent could not be used. In Wales there are limited opportunities for shared transport, so the five works arrived in their own van. As it was the first time the museum had borrowed from Tate, a Tate courier (registrar) travelled separately to oversee the delivery and installation of the works.

The scale of the exhibition and broader project, and bringing in national loans, was a major learning curve for the small team at Ceredigion Museum. A recent major changeover in long-term staff meant that several new museum staff had relatively little museum experience. Many staff only realised the scale and impact of the exhibition once it had opened. The exhibition represented a large step-change for the museum, its staff and volunteers in particular.

The exhibition and symposium were a great success, bringing many different people together to start conversations about important local issues. There were no guarantees of success and the obvious challenges of limited budgets and staff were not easy to overcome. A lot of determination and juggling of responsibilities was required to make everything happen. The time and effort invested was worth it though. Ceredigion Museum, with the addition of a large high security case and GIS level security clearance, now has the facilities to bring in major loans. Relationship building has begun with a wide range of local communities and stakeholders, which will hopefully lead to further major projects in the future.

TOP TIPS FROM ALICE BRIGGS:

- Initiate the loan request as early as possible. The guidelines often represent the minimum time required for straightforward loans to previous borrowers. Remember that loans committees might only meet quarterly to approve loans.
- Start by borrowing from just one national museum to build your experience and confidence, even if you have bigger long-term ambitions.
- Give your team and staff a detailed briefing at an early stage to ensure they understand the impact of bringing works in from a national museum. Make sure you bring them all along as part of the learning journey.
- Sometimes the works you think might be easier to borrow are not. Although not a 'physical' loan, artist films may come with very specific installation requirements and require permissions to be cleared.
- Make sure you understand what the courier's role is and have their telephone number in case of any transport delays.

“ I feel so grateful to have had the support from the Art Fund and Tate that made the exhibition possible. Although challenging at times, it has been an amazing experience and extremely rewarding.

Alice Briggs, Curator, Ceredigion Museum

With special thanks to Alice Briggs,
Curator, Ceredigion Museum

[www.artfund.org/news/2019/04/30/
curator-of-the-month-alice-briggs-
ceredigion-museum](http://www.artfund.org/news/2019/04/30/curator-of-the-month-alice-briggs-ceredigion-museum)

STEPHENSON'S 'ROCKET' - A LOAN FROM THE SCIENCE MUSEUM GROUP TO TYNE & WEAR ARCHIVES & MUSEUMS

This case study summarises the lending experience from a national museum's point of view, exploring the strategic reasons for lending and the impact of lending star objects.

[Stephenson's 'Rocket'](#) (1829) designed by Robert Stephenson (1803 - 1859) and his father George Stephenson (1781 - 1848) was the first modern steam locomotive. It became famous after winning the Rainhill Trials, a competition staged in 1829 to establish the most efficient locomotive for haulage on the Liverpool and Manchester Railway.

[The Science Museum Group](#) (SMG) has longstanding relationships with [Tyne & Wear Archives & Museums](#) (TWAM) since the Science Museum helped set up the Municipal Museum of Science and Industry in Newcastle upon Tyne (now the [Discovery Museum](#)) in 1934.

SMG loaned Rocket to TWAM from June to September 2018 for the [Great Exhibition of the North](#). SMG was particularly keen to contribute to the exhibition and to lend star objects with local significance. Rocket was made in Newcastle at the locomotive works on Forth Banks and has been on display at the Science Museum, London since 1862. Rocket had only been

loaned once before - to a Japanese exhibition in 1998 - and this was the first time it had returned home to Newcastle in over 150 years.

Rocket was displayed at the Discovery Museum on a special plinth alongside 'Charles Parson's Turbina', a 32m long steamship, drawing comparisons between what was once the world's fastest locomotive and what was once the fastest ship.

TWAM's objectives for displaying Rocket were to:

- create a headline attraction telling the story of Innovation in the North
- relate the inspiring story of Rocket and northern innovation to the modern world
- inspire children and young people to become innovators through programmes focussed on imagination and invention for schools and families.

Rocket is a large and complex object. The loan was agreed in October 2016 and SMG was actively involved in the feasibility study and development of the method statement for the installation. Given the complexity of the installation, SMG sent two experienced couriers to oversee the handling, unpacking, condition checking and installation of Rocket. As with all loans out from the SMG, TWAM (as the borrower) covered all of the costs associated with the loan - preparation, packing, transport, installation etc.

Kim McGuinness, who was then Cabinet Member for Cultures and Communities for Newcastle City Council said *"as part of the [Great Exhibition of the North, Stephenson](#)*

Rocket is returning home to Newcastle, on loan from the Science Museum Group. Rocket was built here at a time when the North really was a powerhouse, and led the world in terms of innovation and vision. It went on to unite two more great northern cities, and moved forward the world of steam locomotion and the industrial revolution."

The Rocket display was a great success, attracting over 175,000 visitors, a 79% increase on the same period in the previous year. 12% were new visitors to the museum. Over 5,500 school children engaged with the learning programme, a 143% increase on the previous year.

In addition to Rocket, TWAM also borrowed the [Sokol space suit](#) (1991) from the SMG. Born and educated in Sheffield, Helen Sharman was the first British and first female astronaut to visit the Mir space station. Discussing the loan, Sharman said *"It's fantastic to see that the Sokol space suit from my 1991 journey to the Mir space station will feature in the Great Exhibition of the North. I'm delighted that the loan of my space suit by the Science Museum Group will help the Great Exhibition of the North to celebrate the many incredible scientific, technological and cultural contributions made by northerners. I hope that the story of a young person from Sheffield becoming the first Briton in space will inspire young visitors to believe that they too can achieve something completely unexpected."*

SMG is committed to providing greater public access to its collections through its work with organisations in the UK and internationally. It loans a significant number of objects to non-national



Stephenson's 'Rocket' © Tyne & Wear Archives & Museums

museums across the UK every year, both to first-time borrowers and longstanding partners. Displaying objects in different venues and in different contexts is important and can bring new life, new stories and new love for collection objects, although it can also be challenging to take much loved star objects off display in their 'home' locations. As Ian Blatchford, Director, SMG wrote in an [article](#) for the Guardian, "The norm is that star pieces stay put, perhaps not surprisingly given that they are key attractions for visitors to our major museums. Taking them on the road can be costly and complex, though the truth is that the risk of touring objects is often exaggerated."

With special thanks to Laura Frampton, Head of Strategic Partnerships and Nicole Simoes da Silva, Registrar, Science Museum Group

www.sciencemuseumgroup.org.uk/our-services/object-loans/

SOURCES OF FURTHER INFORMATION



East Asia Gallery, National Museum of Scotland.
Photo: Andy Catlin © National Museums Scotland

American Alliance of Museums - Loans

www.aam-us.org/programs/resource-library/collections-stewardship-resources/loans/

Art Fund - Weston Loan Programme

www.artfund.org/supporting-museums/programmes/weston-loan-programme

Art Fund Weston Loan Programme - Advice from existing grant holders on planning and delivering a loan project

www.artfund.org/assets/supporting-museums/weston-loans/wlp-advice-from-granholders.pdf

Arts Council England - Government Indemnity Scheme (GIS)

www.artscouncil.org.uk/protecting-cultural-objects/government-indemnity-scheme

Arts Council England - Museum and Gallery Exhibitions Tax Relief

www.artscouncil.org.uk/supporting-arts-museums-and-libraries/museum-gallery-exhibitions-tax-relief

Art UK

www.artuk.org

Association of Registrars and Collections Specialists (ARCS)

www.arcsinfo.org

The Bizot Green Protocol

www.nationalmuseums.org.uk/what-we-do/contributing-sector/environmental-conditions

British Museum - Collections Skills Training resources

www.youtu.be/XuW2wSKOgtU

Collections Trust - Loans in Workflow

www.326gtd123dbk1xdkdm489u1q-wpengine.netdna-ssl.com/wp-content/uploads/2017/09/Spectrum-5-0-workflow-Loans-in.pdf

Collections Trust - Spectrum 5.0

www.collectionstrust.org.uk/spectrum

ICOM International Committee for Documentation (ICOM CIDOC) - Exhibition and Performance Documentation

www.network.icom.museum/cidoc/working-groups/exhibition-and-performance-documentation/

International Council of Museums (ICOM) - Code of Ethics

<https://icom.museum/en/resources/standards-guidelines/code-of-ethics/>

Museum Collections Management: A Handbook - Freda Matassa (Facet Publishing, 2011)

Museums Association - Code of Ethics for Museums

www.museumsassociation.org/ethics/code-of-ethics

Museums Association - Smarter Loans: principles for lending and borrowing from UK museums

<https://ma-production.ams3.digitaloceanspaces.com/app/uploads/2020/06/18145331/31012012-smarter-loans-principles.pdf>

Organizing Exhibitions: A handbook for museums, libraries and archives
Freda Matassa (Facet Publishing, 2014)

Sharing Collections: the future of borrowing and lending (webinar series)

www.artfund.org/supporting-museums/programmes/weston-loan-programme

Touring Exhibitions Group (TEG) - Lending and Borrowing Experiences Report

www.touringexhibitionsgroup.org.uk/research-resources/preparing-to-borrow/

Touring Exhibitions Group (TEG) - Manual of Touring Exhibitions

www.touringexhibitionsgroup.org.uk/research-resources/manual-touring-exhibitions

UK Registrars Group (UKRG)

www.ukregistrarsgroup.org

UK Registrars Group (UKRG) - Courier Training Framework

www.ukregistrarsgroup.org/resources/courier-training-framework/

UK Registrars Group (UKRG) - Guidance Notes: The Virtual Courier (UK and Europe)

www.ukregistrarsgroup.org/wp-content/uploads/2020/06/UKRG-Virtual-Courier-Guidance.pdf

Round Room at Birmingham Museum & Art Gallery © Birmingham Museums Trust



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www.beamish.org.uk

Birmingham Museums Trust

www.birminghammuseums.org.uk/bmag

Black Country Living Museum

www.bclm.co.uk

Bristol Museums, Galleries and Archives

www.bristolmuseums.org.uk

British Library

www.bl.uk

British Museum

www.britishmuseum.org

Cornwall Museums Partnership

www.cornwallmuseumpartnership.org.uk

Derby Museums Trust

www.derbymuseums.org

Glasgow Museums

www.glasgowlife.org.uk/museums

Horniman Museums and Gardens

www.horniman.ac.uk

Humber Museums Partnership

www.humbermuseums.com

Imperial War Museums

www.iwm.org.uk

Ironbridge Gorge Museum Trust

www.ironbridge.org.uk

Leeds Museums and Galleries

www.museumsandgalleries.leeds.gov.uk

Manchester Museum

www.museum.manchester.ac.uk

Museum of London

www.museumoflondon.org.uk/museum-london

Museum of the Home

www.museumofthehome.org.uk/

Museums Sheffield

www.museums-sheffield.org.uk

National Army Museum

www.nam.ac.uk

National Galleries Scotland

www.nationalgalleries.org

National Gallery

www.nationalgallery.org.uk

National Library of Scotland

www.nls.uk

National Museum of the Royal Navy

www.nmrn.org.uk

National Museums Liverpool

www.liverpoolmuseums.org.uk

National Museums NI

www.nmni.com/Home.aspx

National Museums Scotland

www.nms.ac.uk

National Portrait Gallery

www.npg.org.uk

Natural History Museum

www.nhm.ac.uk

Norfolk Museums Service

www.museums.norfolk.gov.uk

Royal Air Force Museum

www.rafmuseum.org.uk

Royal Albert Memorial Museum and Art Gallery

www.rammuseum.org.uk

Royal Armouries

www.royalarmouries.org

Royal Botanic Gardens Kew

www.kew.org

Royal Museums Greenwich

www.rmg.co.uk

Royal Pavilion and Museums Trust

www.brightonmuseums.org.uk

Science Museum Group

www.sciencemuseumgroup.org.uk

Sir John Soane's Museum

www.soane.org

Tate

www.tate.org.uk

The National Archives

www.nationalarchives.gov.uk

The Wallace Collection

www.wallacecollection.org

Tullie House Museum and Art Gallery Trust

www.tulliehouse.co.uk

Tyne and Wear Archives and Museums

www.twmuseums.org.uk

University of Cambridge Museums

www.museums.cam.ac.uk

University of Oxford Gardens, Libraries and Museums

www.glam.ox.ac.uk

Victoria and Albert Museum

www.vam.ac.uk

York Museums Trust

www.yorkmuseumtrust.org.uk

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NATIONAL MUSEUM DIRECTORS' COUNCIL

www.nationalmuseums.org.uk

The National Museum Directors' Council (NMDC) represents the leaders of the UK's national collections and major regional museums. While its members are funded by government, the NMDC is an independent, non-governmental organisation.

NMDC provides its members with a valuable forum for discussion and debate and an opportunity to share information and work collaboratively. It is funded by its membership institutions, the directors of which give their time voluntarily to NMDC.

NMDC's vision is that all relevant policy makers and opinion formers understand the full value of museums and their collections, and ensure they are adequately funded and intelligently supported to enable optimum contribution to society and maximum public value.

NMDC advocates on behalf of its members and their collective priorities, acting as their voice to Government and other strategic bodies. NMDC is proactive in undertaking horizon-scanning, setting and leading the museums and cultural policy agendas and gathers, interprets, presents and shares data and evidence of members' activity.

Partnerships and relationships between NMDC and other bodies with responsibility for museums are crucial, and NMDC is committed to collaborating with these bodies, supporting them in their work and avoiding duplication.

TOURING EXHIBITIONS GROUP

www.teg.org.uk

The Touring Exhibitions Group (TEG) is a non-profit sector support organisation devoted to supporting the exchange of exhibitions and the development and exchange of exhibitions in partnership to extend public knowledge and enjoyment of historic and contemporary culture. TEG works across the UK and internationally with organisations of all sizes and types. Members' exhibitions represent all disciplines, including arts, craft, design, social history, natural history and science.

Undertaking research and advocating for a better understanding of the benefits of touring, TEG offers a range of professional development opportunities, online resources and templates, and organises an annual Marketplace to support networking and learning.

Membership is open to all those involved in organising or hosting exhibitions in museums, galleries, libraries, art and science centres and other public organisations, and those that support organisations to undertake this work. TEG provides ways to share ideas, materials and resources.

TEG's membership is its strength, bringing together a diversity of expertise and an awareness of current issues. It supports the sector by providing with up-to-date resources, templates, professional development and networking opportunities.



Learning at Birmingham Museum & Art Gallery. Photo: Andy Stammers © Birmingham Museums Trust

Project managed by Charlotte Dew (TEG), Kathryn Simpson and Suzie Tucker (NMDC), with support in the project's early stages from Katie Childs (formerly NMDC, now of Chawton House).

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