

Spectrum



The UK Museum Collections Management Standard

Loans in procedure

SPECTRUM 4.0

Collections
Trust

SPECTRUM 4.0

© 2011 Version 4.0 Collections Trust

Editors: Alex Dawson and Susanna Hillhouse

The Collections Trust is a registered charity, No. 273984

The work of the Collections Trust is supported by: The Museums, Libraries and Archives Council and Museum Galleries Scotland

The non-commercial use of this version of SPECTRUM is governed by general licences for individuals and organisations. See: <http://www.collectionslink.org.uk> for details.

Please contact the Collections Trust if you wish to use SPECTRUM for commercial purposes.

The Collections Trust asserts its right of trademark in 'SPECTRUM', 'SPECTRUM 4.0' and all derivatives.

Every effort has been made to ensure that the information provided in this publication is accurate. However, the publishers and the editors make no guarantees for the currency and accuracy of information and cannot accept any legal responsibility or liability for any errors or omissions from the publication or the consequences thereof. Products and services that are referred to in this book may be either trademarks and/or registered trademarks of their respective owners. The publishers and editors make no claim to these trademarks.

Loans in procedure

Definition

Managing and documenting the borrowing of objects for which the organisation is responsible for a specific period of time and for a specified purpose, normally exhibition/display, but including research, conservation, education or photography/publication.




Minimum Standard

The organisation must have a policy covering the borrowing of objects. Refer to **Policies and Legal Context** chapter for general advice on collections management policies. See also *Loans in: SPECTRUM Advice* for guidance about Loans in policy decisions.

The procedure for managing and documenting loans in must:

- Establish the purpose of the loan;
- Enable at least the same care of the borrowed object as if it were part of the permanent collections;
- Include written agreements signed by both borrower and lender before the loan commences, as appropriate to the collection;
- Ensure that the terms and conditions of loan are adhered to;
- Ensure that all loans are for fixed periods;
- Ensure a written record of the loan is retained;
- Enable effective control of the loan process;
- Enable the provision of information about the borrower and the loan as requested by the lender;
- Provide insurance or indemnity cover for the loan period;
- Ensure that up-to-date information about the location of borrowed objects is maintained;
- Ensure that up-to-date information about the security of borrowed objects is maintained;
- Ensure that up-to-date information about the physical well-being of borrowed objects is maintained, including the environment and condition of the objects.

Loans in is a SPECTRUM Primary Procedure. This means that in order to meet the documentation requirements for the Museum Accreditation Scheme an organisation must reach the SPECTRUM Minimum Standard for this procedure.

Loans In					
	People	Process	Linked procedures	Information	System
Initiate and Research	 Museum staff	<p>Initiate loan in. Initiation may be by borrowing organisation or via an offer from a lender</p> <p>Set up a file and record information about object during research/initiation phase. Files should be accessible by loan number and lender name.</p>		Reference	Collections Management system
	 Museum staff  lender	<p>Submit loan request in writing. This should be as far in advance as possible and in accordance with period of notice required by the lender</p> <p>Requests should include at least:</p> <ul style="list-style-type: none"> • Date(s) of proposed loan • Venue(s) of proposed loan • Context and purpose • Lender's name and address • Contact name and details • Object numbers of requested objects • Brief descriptions of requested objects • Statement of the intended insurance/indemnity <p>Adapt and re-send loan request and update records according to response</p>		<p>Loan in</p> <p>Object identification</p> <p>Insurance</p> <p>Indemnity</p> <p>Date</p> <p>Organisation</p> <p>People</p> <p>Person</p> <p>Address</p> <p>Reference</p>	
Requests					



Museum staff



lender

Exchange further key information e.g.:

- Provide information on the venue including a formal facilities report if requested.
- Carry out due diligence checks

When agreement in principle is reached, update records with more detailed object information requested from the lender, e.g.:

- Object numbers and descriptions
- Name and addresses of owners
- Valuation
- Condition
- Display recommendations
- Environmental recommendations
- Handling recommendations
- Dimensions
- Photographs of objects to aid research
- Additional historical or descriptive information
- Exhibition number if applicable

Reference
Loan in
Object identification
Valuation
Condition and technical assessment
Object requirement
Object description
Object Collection
Object history and association
Object production
Use of collections
Date
Organisation People
Person
Address



Museum staff

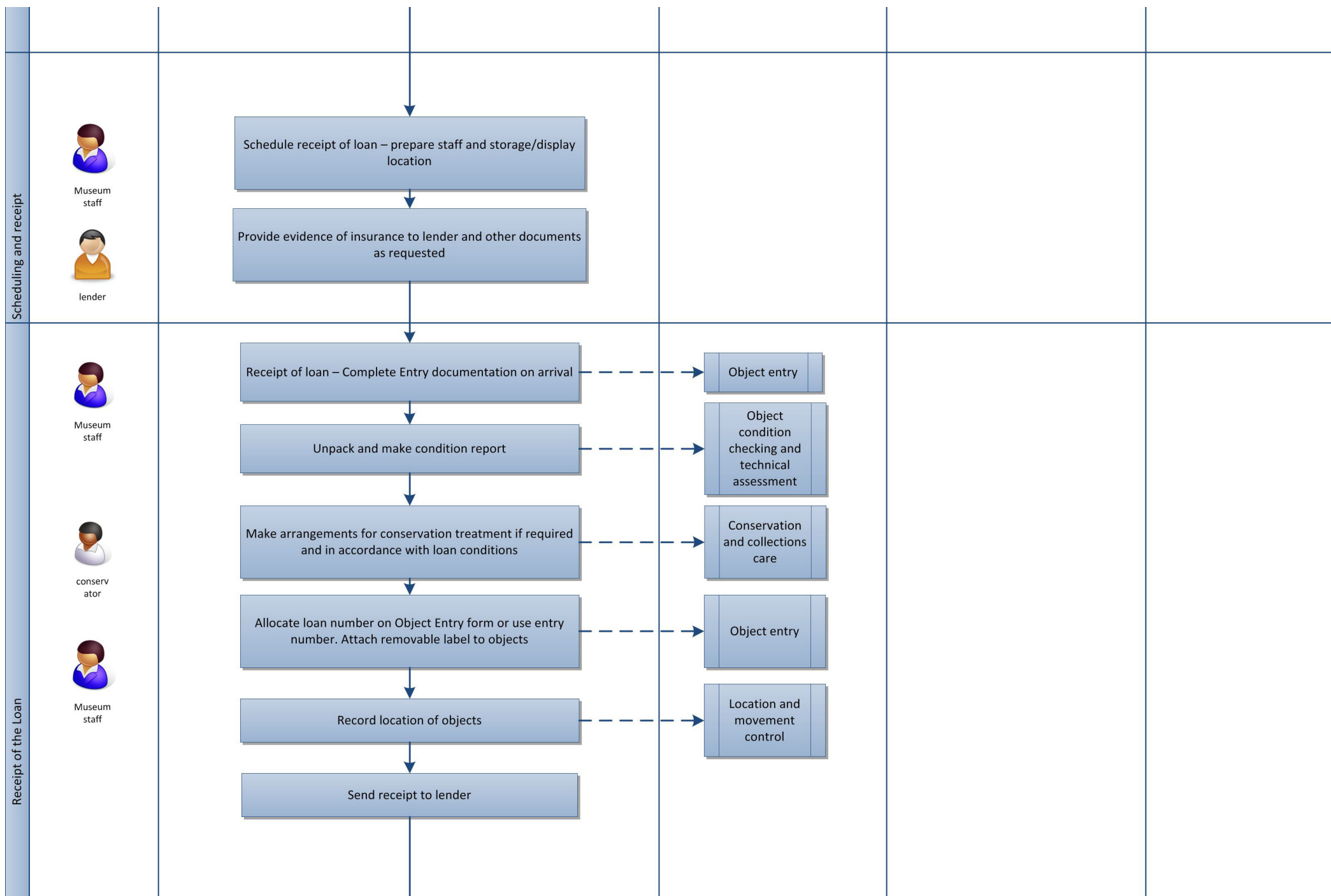


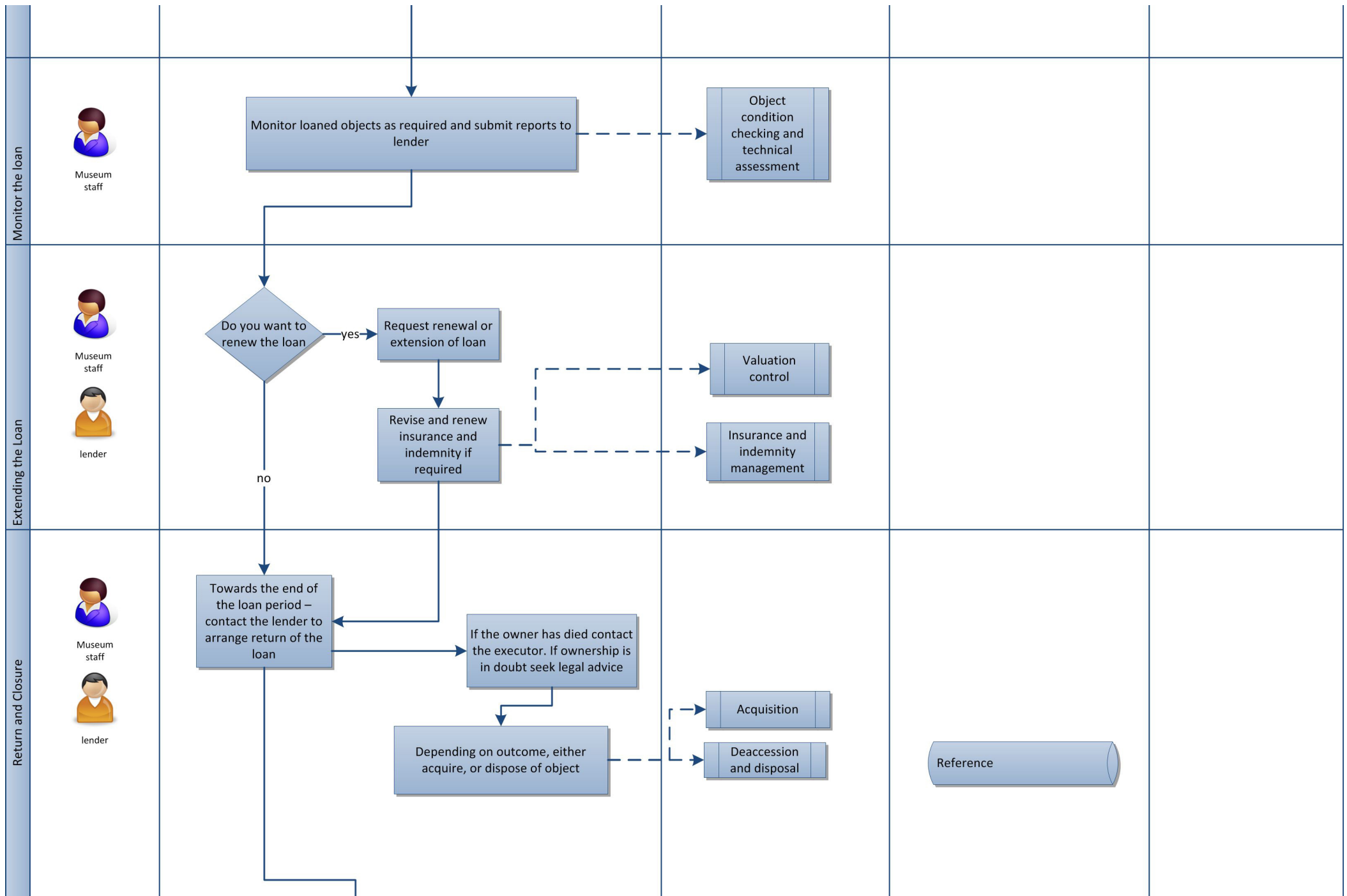
lender

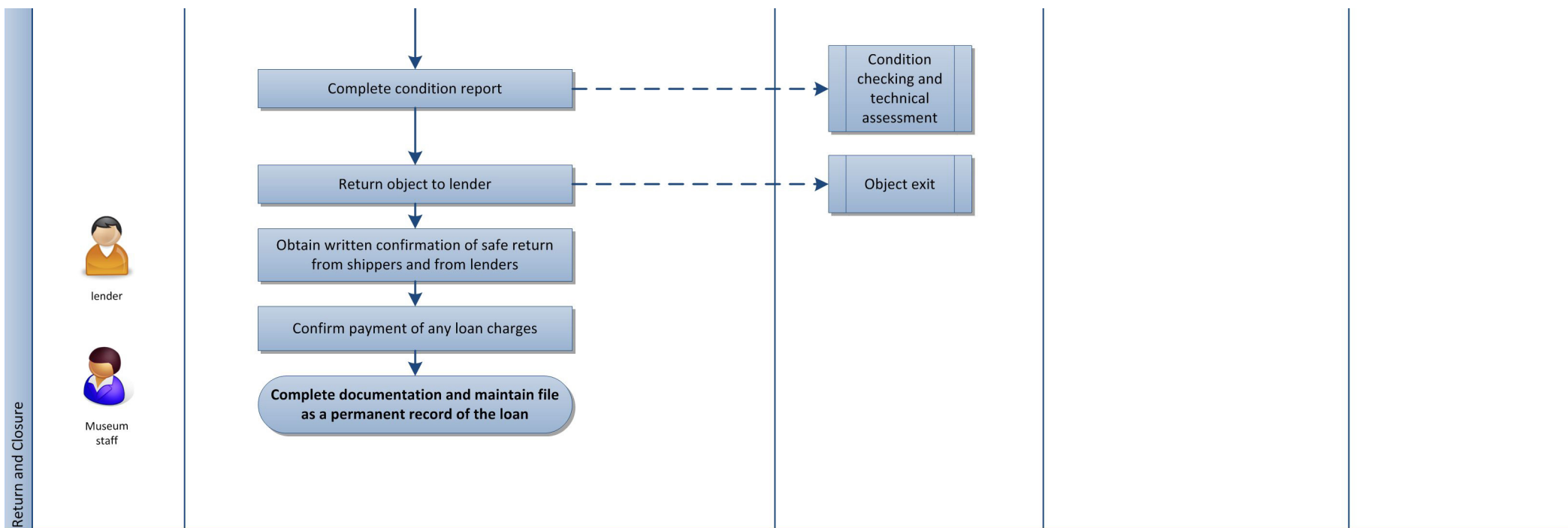
Once the conditions of the loan have been finalised. Both parties sign loan agreement referring to all conditions of the loan, including:

- Object related information
- Insurance and indemnity requirements
- Costs and responsibilities
- Terms of reproductions and intellectual rights
- Packing, transport, courier, and other shipping requirements
- Arrangements for scientific research loans
- Additional terms and conditions as agreed with the lender
- Renewal application date
- Contact details

Reference







Further detailed guidance on the Loans in procedure can be found in *Loans in: SPECTRUM Advice* available on Collections Link

Details of the Units of Information required in this procedure can be found in *SPECTRUM 4.0 Appendix 1, Information Requirements* available on Collections Link