



Guide to Borrowing from the National Museums Scotland

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Introduction

It is the policy of National Museums Scotland (NMS) to always make objects available for loan whenever possible. Loans are an important factor in making the national collections accessible to the widest possible audience and for allowing them to be seen in new contexts. Loans are frequently made to Scottish and other UK venues, as well as many organisations overseas. NMS has on long-term loan in excess of 1400 objects and, on average, 100 objects are lent on a short-term basis to 40 venues annually. Deciding whether or not an object can be borrowed is based on a number of factors that will be explained in these guidelines.

The purpose of this guide is to assist you in successfully requesting a loan and borrowing from NMS. Once a request has been provisionally approved there are conditions a borrower is expected to meet. These loan conditions, the loans policy and loans environmental conditions are at the end of this guide for reference.

The National Museums Scotland has a centralised loans section in the department of Collections Management that co-ordinates loans from all curatorial departments of the organisation. Contact details can be found on the NMS website and are listed at the end of this document.

Who can borrow?

NMS will consider loan requests from any museum, gallery or public organisation. Loans to private individuals or commercial organisations are not usually given, unless the objects are made publically accessible and all loan conditions are met. Objects on loan must be on public display or for research purposes leading to a publication.

The decision to make a loan is based on a variety of factors, including:

- Are the objects already required for another loan or NMS displays?
- Are the venue's environmental and security conditions suitable?
- Will there be public access to the objects?
- Are the objects too fragile to travel?
- Are NMS staff available to process the loan?
- Merits of the exhibition/research project and relevance of requested objects
- How recently an object has been out on loan or display

How to Request a Loan

All exhibition loan requests must be addressed in writing to the Director at **National Museums Scotland, Chambers Street, Edinburgh EH1 1JF**

In your request please state the following:

- List of objects with NMS registration numbers
- Dates and title of exhibition or project
- Contact details for exhibition organiser and/or venue(s)
- Scope of exhibition or project

Loans for the purposes of research must be requested through the relevant curatorial department (See the NMS website).

If you are not sure which objects you wish to borrow or what NMS holds in the collection, your first contact should be with the appropriate curator who will be best placed to advise you about what is held in the collections. Details of the curatorial departments can be found on the NMS website, and you can contact the Departmental Administrators to establish which curator(s) you need to contact. Visits to view the objects well in advance of the loan request should be arranged with the curator and are always advisable.

Alternatively you can contact the Department of Collections Management who can assist you by searching the collections database. The Collections Development Manager is Pam Babes p.babes@nms.ac.uk and Pam or a member of her team will be able to assist you with object searches.

Please make sure you allow enough time for these enquiries and still allow six months notice for your written request once you have the object details. Each request for a UK venue must be made at least six months before a loan is required. For international loans one year's notice is desirable. This is to allow a process of assessment to ascertain if a loan is appropriate and if the venue is suitable.

The Decision Making Process

Once a request for display is received it is taken to the NMS Loans Committee, which meets every six to eight weeks. The Committee provisionally approves or declines a loan based on the availability of staff resources at NMS, the timescale required and the suitability of the project and the objects requested. Loans, Conservation and Curatorial staff all feed into this process.

If the request is approved, it is on the condition that the borrower meets all the loan conditions stipulated. The Loans Section will then proceed to assess the venue for security, environmental conditions and display facilities.

Preparing a Loan for Dispatch

Once the Loans Committee has approved or declined the request the requesting organisation will be informed by the Loans Manager. Conservation staff will then make a thorough assessment of objects to see if they are robust enough for loan. If objects are not suitable for loan the borrower will be informed as soon as possible and alternative objects for loan can be discussed if possible. Conservation will then recommend environmental conditions and packing requirements. They will also provide condition reports to travel with the objects at all times.

For a loan to proceed once it has been provisionally approved the borrower must agree to the NMS loan conditions and a loan agreement must be signed before the objects can be delivered. All conditions of the loan agreement must be met. The NMS loan conditions for outgoing loans can be found at the end of this document.

Your venue's security, display and environmental conditions will be assessed by the Loans Section. You will receive questionnaires to complete regarding these issues and the MLA's National Security Adviser will also contact you. Please provide as much information as you can in these questionnaires and send any additional documents that you think will be helpful. The more information we have the easier it will be to progress the loan. If you have any questions regarding the information required please do not hesitate to contact the Loans Section.

Costs

All costs incurred by a loan will be the responsibility of the borrower. NMS will try to keep costs at a minimum by reusing crates and NMS transport for local venues when possible. We do not charge loan fees, administrative costs, packing or conservation costs. We will pass on the cost of any new crates or packing materials that have to be purchased specifically for the loan, any conservation work that has to be outsourced and all transport & courier expenses. All NMS loans must be covered by insurance or Government Indemnity. NMS will always try to use the Government Indemnity Scheme whenever possible to avoid the cost of insurance, however, there will be times when this is not possible and commercial insurance must be purchased and the cost met by the borrower. NMS will arrange the commercial cover and pass on the cost. Indemnities offered by overseas governments will be considered.

If photography is required, for example for an exhibition catalogue, orders should be sent to the Photo Library via Margaret Wilson m.wilson@nms.ac.uk
NMS will inform the borrower of estimated costs as they arise.

Please note that the most expensive part of a loan is usually the transport and courier costs. (An accompanied object sent via a shipping agent from Edinburgh to London can be £1,500 to £2,000 one way). Transport costs within Scotland can be less expensive, unless ferries or overnight stays are required. Remember to include return costs into your loan budget.

It may be possible to apply for external funding to support the costs of any loan you request, for example Museums Galleries Scotland small grants scheme may support projects including resources required to assist in upgrading standards for objects on loan or to help with exhibition costs.

NMS is always willing to negotiate on a case by case basis the transport requirements of a loan.

Summary of how to borrow:

- **Select Objects**
- **Send formal Request to Director of NMS**
- **State objects, dates and purpose**
- **Six months notice**
- **Meet loan conditions**
- **Meet costs**

Long-Term Loans

Long-term loans will be reviewed and renewed on a three yearly basis. Every three years a new loan agreement will be issued by NMS and the insurance details checked. NMS may wish to send a member of staff to check the objects against condition reports and photographs of the objects may be requested. Any costs associated with the review and renewal of loans will be met by the borrower. If the circumstances of the venue or displays change affecting the loan objects NMS must be informed in writing and approval sought.

The Borrowers Responsibilities

Once a borrower receives objects on loan they are bound by the conditions set out in the NMS loan agreement and the Government Indemnity Scheme conditions. It is the responsibility of the borrowers to inform NMS of any changes affecting the loan objects immediately. Objects on loan should not be handled or moved without a member of NMS staff being present unless formally arranged in advance or in the case of an emergency.

All loans should be credited as: On loan Courtesy of the Trustees of the National Museums Scotland.

FAQS

- **What can I borrow?** Any object can be requested and the decision to lend will be made on the suitability of the venue and project, NMS staff resources, timescale and availability and condition of object.
- **How much notice does NMS require?** Six months for UK venues and one year for overseas.
- **How do I apply?** Please send a formal request in writing to the Director, National Museums Scotland, Chambers Street, Edinburgh EH1 1JF State the objects you require, the dates of your project, details of your project and allow at least six months notice.
- **How long can I borrow for?** Objects can be lent for up to three years and then the loan will be reviewed and renewed every three years after the start date.
- **What is the Government Indemnity Scheme (GIS)?** Once your request has been provisionally approved NMS will ask the MLA's National Security Adviser to assess your venue. If it meets the conditions set by the GIS the loan can proceed with no insurance costs provided the borrower accepts a minimum liability for the value of the objects. GIS is part of the National Heritage Act 1980 of which more details can be found on the DCMS website. www.culture.gov.uk/what_we_do/cultural_property/3294.aspx
- **Will NMS always send a courier?** NMS assesses each loan on a case by case basis and decides what level of security, type of transport and environmental conditions are required. This assessment will also include whether or not it is appropriate to send an NMS courier to accompany and install the loan. It is usually the case that an NMS member of staff will be sent to courier and install the loan. NMS objects will usually only be handled by NMS staff.

Loan Restrictions 2010-2011

The newly refurbished National Museum of Scotland will be opened in July 2011 and until that time NMS resources will be directed towards achieving the Royal Museum Project www.nms.ac.uk/royal_museum_project.aspx Towards this aim, the NMS loan programme will be downsized for 2010 & 2011. If you require a loan for 2010 you should submit your request before 31 July 2009 and if you wish to borrow in 2011 you should submit your request before 30 November 2009. Not all requests will be able to be met.

Please direct any enquiries concerning this restriction of the loans service to the Loans Manager 0131 247 4364.

Contacts:

Loans Manager: Michelle Forster-Davies 0131 247 4364 m.davies@nms.ac.uk
(or Lyn Wall 0131 247 4364 l.wall@nms.ac.uk)

Loans Officer: Yvonne Brownlee 0131 247 4297
Loans Officer: Vicky Evans 0131 247 4190
loansdept@nms.ac.uk for general enquires
or www.nms.ac.uk/national_connections.aspx

y.brownlee@nms.ac.uk
v.evans@nms.ac.uk

NATIONAL MUSEUMS OF SCOTLAND

CONDITIONS GOVERNING THE LOAN OF OBJECTS

Any communication regarding loans should be sent initially to the Director, National Museums of Scotland, Chambers Street, Edinburgh EH1 1JF. Applications for loans should be made at least six months before the date on which the loan is required. The Trustees do not normally lend objects to exhibitions that involve more than one stop (i.e. travelling exhibitions), except those under their direct control.

1. During the period of the loan the responsibility for safe keeping of the object(s) shall lie with the borrowing institution which shall not lend or otherwise dispose of it/them to other parties.
2. All loans from the Museums must be covered by **either** an adequate commercial insurance **or** an indemnity: (a) A borrowing institution proposing insurance must use the policy approved by the Museums and negotiated by them with a commercial insurer. Information about this policy can be obtained from the NMS Loans Office. (b) Indemnities may be accepted in lieu of commercial insurance when they are offered by overseas governments. (c) For loans made under the Government Indemnity Scheme (National Heritage Act 1980) borrowers will normally be asked to accept minimum liability, which must be covered by commercial insurance at their own expense.
3. The Museum's officials shall be allowed access to the borrowing institution's premises at any reasonable time to inspect object(s).
4. The Museum's representative escorting the object(s) between the Museums' premises and those of the borrowing institution may prohibit unloading or installation of the objects(s) if the borrowing institution's premises are deemed by him/her to be unsuitable for the purpose, or if they do not comply with any condition agreed between the Museums and the borrowing institution in correspondence prior to delivery.
5. The object(s) shall not be photographed while in possession of the borrowing institution without the prior permission in writing of the Museums' Director.
6. All the items forming the loan shall be included in the exhibition specified, and reference to it/them (with photographs if possible) shall be included in the exhibition catalogue with acknowledgement to the Trustees of the National Museums of Scotland. A copy of the

exhibition catalogue shall be supplied free of charge to the Museums Library.

7. The premises in which the loan object(s) will be housed shall in all respects be safe, secure and in accordance with the recommendations and requirements of the National Museums Security Adviser. Any additional special protective measures that the Museums may require shall be provided against the risk of loss or damage from any cause. No smoking is to be permitted in any area where the object(s) is/are housed and exhibited.

8. For the purpose of record and security, adequate photographs are required of all object(s) allowed out on loan and if new photographs are necessary to meet this requirement these will be made at the expense of the borrowing institution.

9. Object(s) shall be unpacked and installed only on exhibition premises, and all unpacking, installation, handling and repacking shall be carried out only by authorised staff of the Museums or their appointees, whose travel and subsistence expenses shall be met by the borrowing institution. Packing and transportation costs shall be met by the borrowing institution and the carrier shall be approved in advance by the Museums. The most direct routes of conveyance of object(s) shall be used. The borrowing institution shall ensure that customs examination of object(s) (where applicable) is carried out at the place of exhibition and not at the point of entry into or departure from the country. In order to ensure safe transit through customs barriers and import/export formalities, object(s) and their escorts shall be met on arrival, and accompanied to their departure point.

10. After installation, object(s) may not be handled or removed from the exhibition cases for any purpose except by authorised staff of the Museums, or their appointee, unless such handling or removal is essential for the safety of the object(s) in an emergency. No conservation work, except in cases of the utmost urgency, may be undertaken without the prior permission of the Museums and all such work shall be reported immediately to the Museums. The borrowing institution shall bear the cost, should it be necessary, of Museums staff being sent to inspect and, if necessary, conserve the objects.

11. All object(s) shall be exhibited in secure locked or sealed cases, unless otherwise agreed. The case design and specifications shall be approved beforehand by the Museums and shall include notification of all materials to be used in the cases. Temperature, relative humidity and light levels shall conform to requirements stated by the Museums. Any mounts or methods of support etc. for special object(s) provided

by the borrowing institution shall be approved beforehand by the Museums. The borrowing institution shall ensure that the approved environmental conditions are maintained throughout the exhibition. If these conditions cannot be maintained for any reason the borrowing institution shall consult the Museums immediately.

12. All costs arising in connection with the borrowing of object(s) shall be met by the borrowing institution. Beside the expenses of insurance, photography and transport already mentioned, these shall include the cost of any special packing, mounts, stands, frames or other materials where these are provided by the Museums.

13. Any proposed change in the dates of an exhibition shall be notified immediately to the Museums.

14. The Director of the Museums or his authorised representative may withdraw the object(s) from loan at any time, and will do so if, for example, arrangements for customs examination, security or exhibition prove to be unsatisfactory. The costs incurred in the return of the object(s) (including the travel and subsistence expenses of the Museums' representative) shall be paid by the borrowing institution as if the loan had terminated normally.

15. The borrowing institution shall ensure that these conditions are brought to the attention of the curators and designers responsible for the exhibition.

**UNDERTAKING REGARDING OBJECTS
LOANED BY THE NATIONAL MUSEUMS OF SCOTLAND**

I, _____ on behalf of _____

request the undernoted object(s)

Description of Object(s)

Valuation

For display in

Continued on Nil attached sheet(s) (insert number of sheets)

on loan from the National Museums of Scotland (hereafter referred to as 'the Museums').

The duration of the loan shall be from _____ **to** _____, or such longer or shorter period as may be mutually agreed, notwithstanding which the Museums may recall the object(s) at any time on giving reasonable notice to the borrowing institution.

I undertake to abide by the following conditions of loan –

1. During the period of the loan the responsibility for safe keeping of the object(s) shall lie with the borrowing institution which shall not lend or otherwise dispose of it/them to other parties.
2. All loans from the Museums must be covered by **either** an adequate commercial insurance **or** an indemnity: (a) A borrowing institution proposing insurance must use the policy approved by the Museums and negotiated by them with a commercial insurer. Information about this policy can be obtained from the NMS Loans Office. (b) Indemnities may be accepted in lieu of commercial insurance when they are offered by overseas governments. (c) For loans made under the Government Indemnity Scheme (National Heritage Act 1980) borrowers will normally be asked to accept minimum liability, which must be covered by commercial insurance at their own expense.
3. The Museum's officials shall be allowed access to the borrowing institution's premises at any reasonable time to inspect object(s).
4. The Museum's representative escorting the object(s) between the Museums' premises and those of the borrowing institution may prohibit unloading or installation of the objects(s) if the borrowing institution's premises are deemed by him/her to be unsuitable for the purpose, or if they do not comply with any condition agreed between the Museums and the borrowing institution in correspondence prior to delivery.
5. The object(s) shall not be photographed while in possession of the borrowing institution without the prior permission in writing of the Museums' Director.

6. All the items forming the loan shall be included in the exhibition specified, and reference to it/them (with photographs if possible) shall be included in the exhibition catalogue with acknowledgement to the Trustees of the National Museums of Scotland. A copy of the exhibition catalogue shall be supplied free of charge to the Museums Library. The Museums must be acknowledged in any exhibition publicity.

7. The premises in which the loan object(s) will be housed shall in all respects be safe, secure and in accordance with the recommendations and requirements of the National Museums Security Adviser. Any additional special protective measures that the Museums may require shall be provided against the risk of loss or damage from any cause. No smoking is to be permitted in any area where the object(s) is/are housed and exhibited.

8. For the purpose of record and security, adequate photographs are required of all object(s) allowed out on loan and if new photographs are necessary to meet this requirement these will be made at the expense of the borrowing institution.

9. Object(s) shall be unpacked and installed only on exhibition premises, and all unpacking, installation, handling and repacking shall be carried out only by authorised staff of the Museums or their appointees, whose travel and subsistence expenses shall be met by the borrowing institution. Packing and transportation costs shall be met by the borrowing institution and the carrier shall be approved in advance by the Museums. The most direct routes of conveyance of object(s) shall be used. The borrowing institution shall ensure that customs examination of object(s) (where applicable) is carried out at the place of exhibition and not at the point of entry into or departure from the country. In order to ensure safe transit through customs barriers and import/export formalities, object(s) and their escorts shall be met on arrival, and accompanied to their departure point.

10. After installation, object(s) may not be handled or removed from the exhibition cases for any purpose except by authorised staff of the Museums, or their appointee, unless such handling or removal is essential for the safety of the object(s) in an emergency. No conservation work, except in cases of the utmost urgency, may be undertaken without the prior permission of the Museums and all such work shall be reported immediately to the Museums. The borrowing institution shall bear the cost, should it be necessary, of Museums staff being sent to inspect and, if necessary, conserve the objects.

11. All object(s) shall be exhibited in secure locked or sealed cases, unless otherwise agreed. The case design and specifications shall be approved beforehand by the Museums and shall include notification of all materials to be used in the cases. Temperature, relative humidity and light levels shall conform to requirements stated by the Museums. Any mounts or methods of support etc. for special object(s) provided by the borrowing institution shall be approved beforehand by the Museums. The borrowing institution shall ensure that the approved environmental conditions are maintained throughout the exhibition. If these conditions cannot be

maintained for any reason the borrowing institution shall consult the Museums immediately.

12. All costs arising in connection with the borrowing of object(s) shall be met by the borrowing institution. Beside the expenses of insurance, photography and transport already mentioned, these shall include the cost of any special packing, mounts, stands, frames or other materials where these are provided by the Museums.

13. Any proposed change in the dates of an exhibition shall be notified immediately to the Museums.

14. The Director of the Museums or his authorised representative may withdraw the object(s) from loan at any time, and will do so if, for example, arrangements for customs examination, security or exhibition prove to be unsatisfactory. The costs incurred in the return of the object(s) (including the travel and subsistence expenses of the Museums' representative) shall be paid by the borrowing institution as if the loan had terminated normally.

15. The borrowing institution shall ensure that these conditions are brought to the attention of the curators and designers responsible for the exhibition.

Signature	Date
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BORROWER: Please sign both copies and return one copy to the Loans Office, National Museums of Scotland, Chambers Street, Edinburgh EH1 1JF

1. NMS OUTGOING LOANS POLICY

May 2009

1. Introduction

The National Museums Scotland (NMS) are always keen to make loans from the collections whenever possible and many loans are made each year to institutions in Scotland, the rest of the UK and abroad. Loans are an important way of increasing access to Scotland's national collections and the contexts in which they are seen.

2. What is available for loan

Any object in the collections is potentially available for loan subject to its condition, requirements for its display within NMS, and prior commitment to other loans.

3. Who can borrow

NMS will consider loan requests from any museum, gallery or public institution. NMS will not normally consider loans to private individuals or commercial bodies.

4. Purpose of loan

Loans will only be made for the purpose of giving public access to the objects in the form of a display or exhibition, or for research purposes leading to publication. Each application to borrow will be considered on the merits of the exhibition or research proposal and the importance of the objects requested to the exhibition theme. Loans to international venues will usually only be considered if NMS loans will be published in an associated exhibition catalogue.

5. Applications

All applications for loans must be addressed to the Director and must state the items required, venue(s), dates and contact addresses, purpose of loan and details of exhibition proposal. A minimum period of six months notice is required to allow sufficient time to process the request. Any proposed change in the dates of an exhibition shall be notified immediately to NMS.

6. Approval of requests

Loan requests will be assessed and approved by the Loans Committee, which meets every 6-8 weeks, according to this policy, the availability of staff resources to carry out the loan in the timescale required and according to the conditions of loan being met. Loan requests will be dealt with by the NMS Loans Section.

Before a loan proceeds the borrowing institution will be required to sign a Loan Agreement covering NMS conditions of loan.

7. Loan duration

The maximum period for a loan from NMS collections is three years. However the loan may be reviewed and renewed at the end of this period.

8. Costs

Borrowers will be responsible for meeting all insurance premiums, transport costs, shipping agents fees, courier travel and subsistence when accompanying and installing/deinstalling objects, the costs of any crates required, any modifications to existing crates, and packing materials, mounts and framing for display, photography for catalogues and photography for condition reports, and any special conservation work required to make objects suitable for loan. Where possible, estimates of the likely costs involved will be supplied in advance.

9. Insurance and Government Indemnity

All loans from NMS must be covered by either commercial insurance or an indemnity. A borrowing institution proposing insurance must use the policy approved by NMS and negotiated by them with a commercial insurer. Information about this policy can be obtained from the NMS Loans Manager. For loans made under the Government Indemnity Scheme (National Heritage Act 1980) borrowers will normally be asked to accept the minimum liability which must be covered by commercial insurance at their own expense. Indemnities may be accepted in lieu of commercial insurance when they are offered by overseas governments.

10. Security

The premises in which the loan object(s) will be housed shall in all respects be safe, secure and in accordance with the recommendations and requirements of the National Museums Security Adviser whom NMS will consult before approving a loan. Any additional special protective measures that the NMS may require shall be provided by the borrowing institution.

11. Display

All objects shall be exhibited in secure locked or sealed cases, unless otherwise agreed. The case design and specifications shall be approved beforehand by NMS and shall include notification of all materials to be used in the cases. Any mounts or methods of support provided by the borrowing institution shall be approved beforehand by NMS. All the items forming the loan shall be included in the exhibition specified.

12. Environment

Temperature, relative humidity and light levels shall conform to requirements stated by NMS. The borrowing institution shall ensure that the approved environmental conditions are maintained in any areas in which NMS objects are held and readings must be available to NMS on request. If these conditions cannot be maintained for any reason the borrowing institution shall consult NMS immediately.

13. Transport and couriers

Packing and transport costs shall be met by the borrowing institution and the carrier shall be approved in advance by NMS. Transport must be in accordance with the guidelines issued by the Museums Security Advisor. The most direct routes of conveyance for the object(s) shall be used. The object(s) will be accompanied from NMS to completion of installation at the borrowing institution and return by NMS staff or appointees. The number of staff required will be decided according to the number of objects, complexity of installation and the nature of the journey to the borrowing institution. The borrowing institution shall ensure that customs examination of the object(s) (where applicable) is carried out at the place of exhibition and not at the point of entry into or departure from the country. In order to ensure safe transit through customs barriers and import/export formalities, the object(s) and their escorts shall be met on arrival, and accompanied to their departure point. The services of a shipping agent will normally be required for loans to international venues.

14. Installation and handling

The object(s) shall be unpacked and installed only on exhibition premises, and all unpacking, installation, handling and repacking shall be carried out only by NMS staff or their appointees. After installation, the object(s) may not be handled or removed from the exhibition cases or cases opened for any purpose except in the presence of NMS staff or their representatives unless such handling or removal is essential for the safety of the object(s) in an emergency. No conservation work, except in the cases of the utmost urgency, may be undertaken without the prior permission of NMS and all such work shall be reported immediately to NMS. The borrowing institution shall bear the cost, should it be necessary, of NMS staff being sent to inspect and, if necessary, conserve the object(s). After unpacking, empty crates must be stored in a secure, waterproof and stable environment. Interior fittings must not be removed.

15. Withdrawal of loans

The NMS representative escorting the object(s) between NMS premises and those of the borrowing institution may prohibit unloading or installation of the object(s) if the borrowing institution's premises are deemed by him/her to be unsuitable for the purpose, or if they do not comply with any condition agreed between NMS and the borrowing institution prior to delivery. The Director of NMS or his/her authorised representative may withdraw the object(s) from loan at any time, and will do so if, for example, arrangements for customs examination, security or exhibition prove to be unsatisfactory. The costs incurred in the return of the object(s) (including the travel and subsistence expenses of the NMS representative(s)) shall be paid by the borrowing institution as if the loan had terminated normally.

16. Photography

Photography of the object(s) is not permitted while in possession of the borrowing institution without the prior permission in writing of NMS.

17. Catalogues & Exhibition information

Reference to the object(s), with photographs if possible, shall be included in the exhibition catalogue and two copies supplied free of charge to NMS Library. Catalogue entries, photographs and exhibition labels must all bear acknowledgement to the 'Trustees of the National Museums Scotland'. A copy of the label text must be supplied to NMS for inclusion in NMS Database.

18. Long-term Loans

NMS will ask the borrowing institution to confirm the presence and good condition of loans on an annual basis. NMS may in the case of sensitive material require an NMS conservator to inspect the object(s) on an annual basis and the expense of this would need to be met by the borrowing institution.

May 2009

NATIONAL MUSEUMS SCOTLAND

ENVIRONMENTAL CONDITIONS GOVERNING THE LOAN OF OBJECTS

The environmental conditions governing the terms of any loan will be decided by the Loans Department in consultation with NMS curatorial and conservation staff. The suitability of a venue will generally be assessed on the basis of completed Facilities and Case reports. These following conditions are taken from our Environmental Policy and are designed as a guideline in considering what we require as a minimum standard for the display and storage of our objects. Borrowers should note that specific objects may require tailored environmental conditions depending on their sensitivity.

1. Environmental Conditions for Loaned Objects

The NMS collections are broad in the diversity of their material type and too numerous to give an exhaustive list. However, the following is a guide to conditions that should be met when borrowing from NMS collections. Other vulnerable collections should be treated according to specialist advice under negotiation with NMS.

2. Parameters

When borrowing from the NMS collections, the parameters to be considered are:

1. Relative Humidity (Section 2.1)
2. Temperature (Section 2.2)
3. Light (Section 2.3)
4. Ultra-violet radiation (Section 2.4)
5. Display and Storage Materials (Section 2.5)
6. Vibration (Section 2.6)
7. Pollution (Section 2.7)

2.1 Relative Humidity

Collections are considered in two main types with regards to environmental sensitivity. Rates of change in relative humidity should always be minimised, see restrictions below. Enclosures can be used to improve conditions around sensitive individual objects, for example exhibition cases with buffering, can be used as an additional control method.

The following limits are the NMS recommended standard for the display of our objects.

2.1.1 NMS outer limits of RH for organics and sensitive mixed media collections

Limits	45-60%RH
Set point	50-55%RH desirable where possible
Restrictions	Rates of change should be limited to 10% within 12 hours, with a maximum of 6% in 3 hours

2.1.2 NMS outer limits of RH for inorganics and robust collections

Limits	35-65%RH
Set point	Desirable where possible
Restrictions	Rates of change should be limited to 10% within 12 hours, with a maximum of 6% in 3 hours

2.1.5 Other materials

There are other specific types of materials in the collection that require tailored RH conditions, for example archaeological metalwork and some geological specimens. The conditions required for these items will be made clear to borrowers, following recommendations of NMS conservators and published literature where applicable for specific items.

2.2 Temperature

Rates of change in temperature should be minimised at all times. Objects must not be displayed directly next to heat sources or areas where the effects of solar gain may be harmful.

2.2.1 NMS outer limits of temperature in display and areas of sensitive materials

Limits	17-23°C
Set point	Desirable where possible, with gradually introduced seasonal differences between summer and winter
Restrictions	Rates of change should be limited to 4°C within 12 hours, with a maximum of 2°C per hour

2.3 Visible Light

Damage caused by light is cumulative and varies according to the intensity of light, its wavelength and the exposure period. Therefore, the desired light levels are represented as an Annual Cumulative Exposure.

2.3.1 Artificial light levels should be controlled using dimmer switches and low wattage bulbs if possible. Natural light levels should be controlled by using blinds, solar film or boards. Cumulative exposure can be controlled by removing or excluding light when objects are not on display and when the museum is closed. All lighting (apart from emergency lighting) should be turned off when the museum is closed.

2.3.2 *Very Sensitive Materials i.e. textiles, most works of art on paper, fur, feathers, dyed leather.*

Annual cumulative levels	150 klux hours per year
Daily levels	eg 50 lux for 8 hours per day or 100 lux for 4 hours per day

2.3.3 *Sensitive Materials i.e oil paintings, wood, ivory, bone, works of art on paper which are black and white and in good condition.*

Annual cumulative levels	450 klux hours per year
Daily exposure levels	150 lux for 8 hours per day or 300 lux for 4 hours per day

2.3.4 *Insensitive to Light i.e metals, stone, ceramics, glass, enamels*

Annual cumulative levels	Can exceed 450 klux hours per year
Daily exposure levels	Can exceed 150 lux for 8 hours per day

2.4 Ultra-violet Radiation

Ultra violet radiation is extremely damaging to many materials and therefore the borrower should aim to achieve zero levels of UV radiation. This is possible in most areas by use of suitable UV-excluding filters which meet recognised museum & gallery standards. In all cases the UV radiation should not be greater than 75µW/lumen.

2.5 Display and storage materials

All materials used in the intimate display and storage of objects must be tested by accelerated corrosion testing (e.g. Oddy Test), or come from an approved source (eg materials that have been tested by other museums or are known to be of archival quality, information about these sources is available through the Loans department). We provide an in-house testing facility but a minimum of six weeks from receipt of sample is required to complete these tests. An in-house database of tested materials is available for consultation through the Preventive Conservator.

2.6 Vibration

Object specific inert mounts should be used to support vulnerable objects or objects in areas where vibration is a risk. We can advise on mounting materials if required. *Any planned building works should be reported to NMS via the requested Facilities Report.*

2.7 Pollution

Well sealed storage and display furniture should be used to reduce dust levels where gallery or conditions do not provide adequate control.

Construction materials used in display cases must be allowed to off-gas before objects are installed, ideally up to two months before installation. The effects of mixed media displays should be considered i.e. displaying a woollen artefact in the same case as a silver artefact will lead to rapid tarnishing of the silver item.

3. Monitoring

3.1 Relative humidity and temperature

Relative humidity and temperature should be monitored continuously wherever possible throughout the course of the loan, by digital readers if available or manual readers if not. The following objects take priority; those from sensitive or environmentally unstable collections, those displayed in new galleries, or where development work is planned or has taken place and Category A collections.

3.2 Light and UV

Light and UV levels should be established and recorded at the point of installation, continuous monitoring is not required where no daylight is present.

We can provide details of suppliers, equipment and materials that may be of use and are happy to consult on meeting these standards wherever possible.

Appendix 1

GOVERNMENT INDEMNITY SCHEME: TRANSPORT CONDITIONS

1. Transport companies used to move object(s) must have experience in the transport of fragile and valuable artefacts with employees trained in the handling of such material and must be able to meet the conditions below and confirm this in writing.
2. When indemnified objects are sent out or brought in from abroad the company must have the ability and appropriate experience to handle consignments of valuable and fragile material. The company must be experienced in dealing with airport and seaport procedures and all necessary documentation.
3. The removal, packing, unpacking and transport of the loan material must be supervised by senior members of the transport company in consultation with the lender and/or borrower of the material.
4. Vehicles, whether owned by a transport company or the borrower or the lender, used for the transport of indemnified material must conform to the specifications in paragraphs 5 to 10 below.
5. Vehicles used should normally be closed vans (ie having solid sides and roof) with a windowless freight compartment separate from the driving cab. All vehicles to be equipped with good quality locking devices. Additional locking facilities may also be required; such as closed shackle padlocks. Any locking bars or external fillings must be secured with concealed or non-return screws or welded or riveted into place.
6. Vehicles should provide appropriate protection against vibration and shock and extremes in relative humidity and temperature conditions for consignments of valuable and fragile material. Air-ride suspension and climate control equipment may be necessary in appropriate circumstances. Environmental conditions should be monitored.
7. Vehicles and crew have to be equipped with appropriate means of communications such as fixed and/or mobile radio telephones for route monitoring and emergencies.
8. Keys to the freight compartment should be kept separate from the vehicle keys.

9. Vehicles other than closed vans may be used in appropriate circumstances, eg the carriage of exceptionally large items which may demand the use of an open lorry with the load suitably covered. Furthermore, small consignments or single items may be carried by car, small van, taxi, train or air providing a sufficient number of couriers are in attendance.
10. All vehicles must be provided with fire-fighting equipment appropriate to the load and the crew experienced in its use.
11. Whatever method of transport is used compliance with the operating conditions in paragraphs 12-19 is required.
12. A vehicle must carry two drivers on long journeys, or one driver and a courier on short journeys. The crew to consist of responsible persons experienced in the handling of valuable consignments and capable of dealing effectively with an emergency situation.
13. Where space on the carrying vehicle is limited, or where deemed essential for security control, a second escorting vehicle will need to be provided and equipped with mobile radio/telephone communications.
14. The route needs to be carefully planned and the addresses and telephone numbers of emergency services should be carried by the crews and accompanying couriers.
15. Ideally the journey should be completed in one haul.
16. When a stopover is necessary arrangements must be made to lodge the vehicle and/or material in secure premises which are protected by a 24-hour intruder and fire alarm system or under continuous supervision.
17. On no account should a vehicle be left unattended by the crew even in an emergency.
18. Special circumstances may apply to some overseas transport but arrangements must be no less rigorous than those specified above.
19. An effective 'no smoking' policy must apply in areas containing loan material.

A In the event of loss or damage due to the specified conditions not having been observed the Secretary of State shall be entitled to conduct in the name of the owner or lender the pursuit or settlement of a claim against the borrower or a third party or to prosecute in the name of the owner. The Secretary of State shall have full discretion in the conduct of any proceedings or in the settlement of any claim and the owner shall give all such information

and assistance the Secretary of State may require.

B These conditions are the minimum requirements of the Government Indemnity Scheme, but borrowers should be aware that some lenders impose additional conditions which the borrower will be required to meet for the loan to proceed.

Appendix 2

GOVERNMENT INDEMNITY SCHEME: FOOD AND DRINK CONDITIONS

The general security and environmental conditions applying to exhibitions and displays covered by government indemnity do not allow food and drink in the area containing the indemnified material unless arrangements are approved by the Museums Security Adviser and the Environmental Adviser of Resource. If it is not possible in connection with private views or other functions to serve food and drink in spaces other than those containing indemnified material the Museums Security Adviser must be consulted and the following conditions are likely to apply.

1. A strict enforcement of the ban on smoking.
2. Food and drink is prepared and dispensed in a space not containing indemnified material. No heat or steam generating equipment can be used in the space containing indemnified material.
3. The serving of red wine in a space containing indemnified material which is unglazed or uncased must be avoided.
4. Strict attention is given to the cleaning operation to ensure removal of residue of food and drink. Appropriate checks should ensure that chemical cleaning agents or extra amounts of water do not adversely affect environmental stability or the corrosivity of the atmosphere next to indemnified material.
5. Where practicable the installation of suitable barriers are required to prevent close approach to unglazed, fragile or sensitive exhibits. Such barriers must be a minimum of one metre distant from the object to provide a manageable sterile zone.
6. The deployment of adequate staff on invigilating duties in all exhibition spaces containing indemnified material especially where barriers cannot be installed. If arrangements are made incorporating the above together with any additional measures required by Resource the government indemnity will remain

valid. If, however, there are any doubts about arrangements or where it is felt that government indemnity may be affected or that different arrangements are sought, the Museums Security Adviser and Environmental Adviser must be consulted.



Confidential

This Facilities Report was devised by the United Kingdom Registrars' Group (UKRG) in consultation with the Museums, Libraries and Archives Council.

The form will enable lenders to assess the practicalities involved in making loans. It is intended to help both borrowers and lenders identify potential problems and reach agreement on how these can be resolved.

It should therefore be completed and returned as quickly as possible.

The form is intended for use in all kinds of museums and galleries, irrespective of type of collection or size. For this reason not all questions will be relevant to every borrower. However as a standard form it can be filled in once and updated for use with any future loan requests. Please complete the form therefore as fully and accurately as possible, adding any other information which you feel may be relevant. You should retain a copy for future use.

Lending Institution Address	
Contact Position Telephone Fax Email Lending Institution's Reference Code	
Loan Venue Address	
Contact Position Telephone Fax Email Purpose of Loan/Title of Exhibition Dates at this Venue Date Form Completed	

[A] Building

This section aims to create a picture of the type of building in which loans would be housed, as well as covering potential dangers such as building work and infestation by pests. It would be helpful if a photograph or postcard could be included.

Please note parts of this section are replicated in the UKGR Standard Facilities Report Security Supplement.

1.1 Are your premises purpose-built galleries / museums / other?										
1.2 If "OTHER" please supply details										
2. When were your premises completed?										
3.1 What type of building materials are used in the construction of the building?	Exterior Walls	Brick	Concrete	Glass	Safety Glass	Steel	Stone	Wood	Other*	
		Interior Walls								
			Ceilings							
			Structural Supports							
	*If <i>other</i> please provide details									
	4.1 Do you have any construction or refurbishment work in progress or planned within the next 3 years?	YES/NO								

<p>4.2 If YES, please supply details (nature of work, dates)</p>	
<p>5.1 Have your premises ever been assessed by the UK Museums Security Adviser based at MLA?</p> <p>5.2 If YES, please supply details</p>	<p>YES/NO</p>
<p>6. Does your institution have a procedure in place to deal with emergencies? (e.g. a disaster plan)</p> <p>If YES please supply a copy</p>	<p>YES/NO</p>
<p>7. In the event of an emergency who would be authorised to remove items from danger?</p>	
<p>8.1 Is smoking permitted anywhere in the building?</p> <p>8.2 If YES, please state where and how this is controlled</p>	<p>YES/NO</p>
<p>9.1 Do you make routine inspections for rodent, insect and micro- organism problems?</p> <p>9.2 If YES, please supply details</p>	<p>YES/NO</p>

[B] Exhibition area

The information requested in this section will help lenders and borrowers decide which is the safest way of displaying a loan, as well as consider the practicalities of lending/borrowing physically problematic objects.

Please attach floor plans of the exhibition areas to be used, clearly indicating each separate space and showing the position of routinely opened doors and windows, and, as far as possible, unshaded glazing, sources of heat, draughts etc.

[B] Exhibition area (cont.)

<p>1. When was the exhibition area to be used opened or last refurbished?</p>	<hr/> <hr/> <hr/> <hr/>
<p>2. What methods are used to secure loans to walls, partitions, plinths etc.? Please describe your usual method Please refer to the attached display case questionnaire</p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p>3. How do you regulate the number of visitors in exhibition areas?</p>	<hr/> <hr/> <hr/> <hr/>
<p>4. Is the consumption of food or drink ever permitted, or are events (concerts, receptions, dance etc.) ever permitted in exhibition areas?</p>	<p>YES/NO</p>
<p>5.1 Do you use barriers or other methods of physical protection for material on display?</p> <p>5.2 If YES, please supply details</p>	<p>YES/NO</p> <hr/> <hr/> <hr/> <hr/>
<p>6. Please supply details of how the exhibition area is routinely managed during an exhibition with regard to:-</p> <ul style="list-style-type: none"> • lamp replacement • cleaning of floors & display cases • cleaning of items on open 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

displays etc. • checking of equipment	

[C] Access

The information requested in this section allows borrowers and lenders to think in terms of the problems that may be encountered (stairs, awkward corners etc.) when moving large or heavy objects and plan necessary precautions.

1.1 Are there any restrictions to vehicle access to your premises (low archways, tight corners, size/weight restrictions etc.)?	YES/NO
1.2 If YES , please supply details	
2.1 Do you have a covered loading bay?	YES/NO
2.2 If NO , where do you take a delivery of loans?	
3.1 Do you have a goods lift?	YES/NO
3.2 If YES , what are its interior dimensions/load capacity?	
3.3 If NO , how do you move loans between differing floor levels?	
4. What is the maximum size of object/packing case that can be brought into the exhibition space by the normal route?	

[D] Handling

The information requested here allows borrowers and lenders to agree on the most appropriate handling method/procedures for particular loans.

1.1 Who carries out the packing/handling of loans?	
1.2. What training etc. have they received?	
2. Where do you unpack/repack loans prior to and after display?	
3. Where are cases, packing materials etc. stored?	
4. Who is responsible for completing incoming /outgoing condition reports?	
5.1 Are regular checks made for dust and damage?	
5.2 If YES , by whom and how often?	
6. Who dusts etc. loans on open display?	

[E] Environmental conditions

This section is intended to assess the prevailing environmental conditions at a loan venue and identify any potential problems so that workable solutions can be agreed.

Please note that this section covers both the exhibition area as a whole and the possible use of display cases.

Please attach copies of readings for temperature and relative humidity for the areas in which you propose to display loans. The readings should be continuous and cover the period of the previous year equivalent to that of the loan period. They should clearly show the rate of change on the most regular basis available.

If these are not available please provide as much information as you are able.

(a) Temperature and Humidity

<p>1. Do you monitor temperature and relative humidity on a regular basis:</p> <p>1.1. In the exhibition area?</p> <p>1.2. In display cases?</p>	<p></p> <p>YES/NO</p> <p>YES/NO</p>
<p>1.3 If YES, please supply details (method or equipment used, frequency of calibration or service)</p>	<p></p> <p></p> <p></p> <p></p>
<p>2. What ranges of temperature and relative humidity are maintained over the year?</p>	<p></p> <p></p> <p></p> <p></p>
<p>3. How is temperature and relative humidity controlled:</p> <p>3.1 In the exhibition area?</p> <p>3.2 In display cases?</p>	<p></p> <p></p> <p></p> <p></p> <p></p> <p></p> <p></p> <p></p>

<p>4. Are these control methods in operation 24 hours per day:</p> <p>4.1 In the exhibition area?</p> <p>4.2 In display cases?</p>	<p></p> <p>YES/NO</p> <p>YES/NO</p>
<p>5.1 Do you maintain the same environmental conditions in your storage, unpacking or packing areas as are maintained in exhibition areas?</p>	<p>YES/NO</p>
<p>5.2 If NO, please supply details of conditions and controls</p>	<p></p> <p></p> <p></p> <p></p>
<p>6.1 Do you have the means of controlling atmospheric pollutants (e.g. dust filters)?</p> <p>6.2 If YES, please supply details of method used</p>	<p>YES/NO</p> <p></p> <p></p> <p></p> <p></p>

(b) Lighting

<p>1. How are exhibition areas lit overall?</p>	<p></p> <p></p> <p></p> <p></p>
<p>2. What type of light is used to illuminate individual loans:</p> <p>2.1 in exhibition areas?</p>	<p></p> <p></p> <p></p> <p></p> <p></p>

<p>2.2. inside display cases?</p>	<hr/> <hr/> <hr/> <hr/>
<p>3. Do you monitor light on a regular basis throughout exhibition periods?</p>	<p>YES/NO</p>
<p>4. Do you monitor light on a regular basis when installing and dismantling exhibitions?</p>	<p>YES/NO</p>
<p>5. What range of visible and UV light can be maintained in exhibition areas?</p>	<hr/> <hr/> <hr/> <hr/>
<p>6. Are you able to limit the levels of visible and UV light falling on sensitive objects?</p>	<hr/> <hr/> <hr/> <hr/>
<p>7. How many hours per week will the items be exposed to light? (include hours when closed to the public)</p>	<hr/> <hr/> <hr/> <hr/>
<p>8. How do you control daylight?</p>	<hr/> <hr/> <hr/> <hr/>
<p>9. Please supply construction details of display cases to be used (construction materials, display materials, types of seal etc.)</p> <p><i>Please note. You may be asked to supply more detail of the display cases you propose to use by completing a UKRG Standard Facilities Report Display Case supplement.</i></p>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Signed: _____ Name: _____

Position: _____ Date: _____

When returning this facilities form please include:-

(Tick as appropriate)

- | | |
|---|--|
| <input type="checkbox"/> Floor plans of each of the exhibition spaces to be used clearly indicating the position of the relevant display case(s). | <input type="checkbox"/> Lock manufacturer's information or specification |
| <input type="checkbox"/> Case manufacturer's information or specifications | <input type="checkbox"/> Any other information which you feel might be helpful |

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