

Bolton Library and Museum Services

Loans Out (Lending Objects) Policy

Author (name):	Matthew Watson
Author (designation):	Museum Access Officer
Date approved:	
Date uploaded to intranet:	
Review date:	December 2029
Key words:	Museums, archives, loans, lending objects

Version control

Version	Author of changes	Date (Month, Year)	Revisions from previous issues	Circulation
1.0	Pierrette Squires	Dec 2014	New policy implemented and approved	
1.1	Pierrette Squires	2020	Updated	
1.2	Matthew Watson	November 2024	Last updated	
1.3			Published on *insert department* policies intranet page	
2.0			Reviewed to include	Via Intranet
2.0		Jan 2025		Published online

CONTENTS

	Section	Pages
1.	Introduction	4
2.	Purpose of Policy	4
3.	Terminology and Definitions	4
4.	Duties and Responsibilities of Individuals and Groups	4
5.	Loan Policy Statement and Implementation	5
6.	Loan Agreement	6
7.	Insurance	6
8.	Security	7
9.	Data Protection Act 2018	7
10.	Monitoring and Review	7
	Appendix 1:	

1. Introduction

This policy relates to the lending of museum objects to other organisations and how the service manages this process until the loans are returned.

2. Purpose of the Document

The purpose of this policy is to set out how the service will manage the process of lending objects. Most of the loans we approve are for temporary exhibitions; other reasons include specialist research. Lending can be a good way of raising the profile of the museum collections and developing our networks. Loans sometimes bring additional benefits such as conversation work (paid for by the institution that has requested the loan) which enhances the condition of the object.

3. Terminology and Definitions

The Loans Out policy applies to the lending of objects from the collections of Bolton Library and Museum Services to any other organisation or individual. Loans Out may be for the purpose of gallery display, temporary exhibition, touring exhibition, research, education or outreach.

Objects which are sent to external conservators will be subject to the Conservation and Collections Care policy.

Any objects in the permanent collections which leave Bolton Library and Museum Services for any reason are also subject to the Exit policy.

TMS (The Museum System) is a database that the museum uses to manage all aspects of its collection management processes including loans out.

4. Duties and Responsibilities of Individuals and Groups

Loans of objects from the permanent collections for the purpose of gallery display, temporary exhibition, touring exhibitions, research or education must be approved by the Collections Management Team at the monthly collections management meeting. The Collections Management Team should include as a minimum: Team Leader: Museum Access, the relevant Museum Access Officer, one other Museum Access Officer.

For objects on loan from the permanent collections, the appropriate Museum Access Officer is responsible for assigning a unique number to un-numbered objects, labelling objects with their unique numbers and creating object records on TMS for any uncatalogued objects.

The appropriate Museum Access Officer is also responsible for administering the loan for its duration, including putting in place a Loan Out agreement, producing condition reports, arranging conservation work, creating and updating a TMS Loans Out record and filing associated paperwork. This member of staff will be named as contact for the loan on the loan agreement.

The Museum Access Officer (in close consultation with the Team Leader: Museum Access) is responsible for identifying and arranging any necessary conservation work prior to or after the period of loan. The Team Leader: Museum Access is responsible for providing advice and support on conservation issues and updating conservation information on TMS object records.

Following advice from the Team Leader: Museum Access, the appropriate Museum Access Officer is responsible for overseeing the administration of Loans Out and checking records on TMS.

The responsible Museum Access Officer will act as the main contact with the Bolton Council Insurance Officer.

5. Loan Policy

5.1. Loan Policy Statement

Bolton Library and Museum Services follows national (Spectrum) standards that cover the lending of objects to other organisations. Any objects that the service loans out will be for a fixed period and for a specific purpose such as a temporary exhibition. Loans out must be authorised internally, and a loan agreement signed by the lender and borrower before the object can be dispatched.

5.2. Loan Policy Implementation: General Points

Loans may be initiated either by the potential borrower or by Bolton Library and Museum Services.

For loans to be considered a written request must be submitted.

Loan requests should normally be submitted at least three months before the loan is required. Requests submitted later than this may still be considered at the discretion of the Collections Management Team.

Loans will be considered for the purpose of long-term display, temporary exhibition, touring exhibition, research or education. Loans for other purposes may be considered if the Standard Conditions of Loan can be met by the borrower.

Requests for the loan of human remains will be assessed according to the Bolton Library and Museum Services Human Remains Policy and in line with the Guidance for the Care of Human Remains in Museums (DCMS 2005) or the Human Tissue Act (2004) as appropriate.

Requests for loans for the purpose of destructive testing will be assessed according to the Bolton Library and Museum Services Research Policy.

Bolton Library and Museum Services reserve the right to refuse any loan request.

A loan request may be refused if:

- The object is already programmed for use by Bolton Library and Museum Services.
- The object is programmed for loan to another organisation/individual.
- The object is too fragile for transportation and/or display.
- The object carries a Health and Safety risk to handlers/users.
- The borrower cannot demonstrate suitable conditions / security for the object at their venue.

Bolton Library and Museum Services will consider loan requests from National, Local Authority, University and privately run museums and other educational or cultural organizations.

For loans to organisations a Facilities Report is required. The United Kingdom Registrars' Group Standard Facilities Report and Security Supplement (available at www.ukrg.org/publications) will be used.

Bolton Library and Museum Services will consider Natural History loan requests from individuals for research purposes.

For Natural History loans to individuals for the purpose of research a reference from a Registered / Accredited Museum, a university or other academic institution is required.

Type Specimens may be loaned to individuals with acceptable references but must not be dispatched by post.

Prior to loan, all objects will be assigned a unique object number, and an object record will be created on TMS.

Bolton Library and Museum Services will normally require at least one courier to accompany objects in transit to and from loan destinations outside the UK.

Bolton Library and Museum Services may on occasion require a courier to accompany objects in transit to and from loan destinations within the UK.

If a courier is appointed, the United Kingdom Registrars' Group Courier Guidelines will be followed.

All transport arrangements must be approved by the appropriate collections access officer and the Conservator.

Objects lent to other venues within Bolton Council remain the responsibility of Bolton Library and Museum Services and therefore do not require a Loan Out agreement but must be regularly monitored.

6. Loan Agreement

All approved Loans Out will be subject to a single agreement signed and dated by both parties. This agreement must be put in place before the objects are dispatched.

A Loan Out must not be subject to more than one loan agreement, therefore the loan administrator must not sign the borrowing organisation's Loans In agreement. In case of disagreement, the terms of the Loan Out agreement may be negotiated to cover all relevant points to the satisfaction of both parties.

The Loan Out agreement consists of an agreement form, Schedule of Objects, Standard Conditions of Loan and (where appropriate) Special Conditions.

Where the borrower cannot meet the Standard Conditions of Loan, the terms of the Loan Out agreement may be negotiated, providing that the condition and security of the object(s) are not compromised.

Clauses may be added to the Special Conditions section of the agreement at the discretion of the loan administrator after negotiation with the borrower.

Special Conditions will normally be added for Loans Out to overseas venues.

If the agreed conditions of loan are breached or objects are not returned at the end of the period of loan Bolton Library and Museum Services may begin proceedings for breach of contract (through Bolton Council's Legal Department).

7. Insurance

It is the responsibility of the borrowing institution to provide 'all risk' insurance cover for loan objects for the duration of the loan, both at the loan venue and in transit ('nail to nail'), as stated in the Loan Out agreement.

Bolton Library and Museum Services will provide insurance valuations and record them on the Loan Out agreement, which must be agreed and signed by both parties before the loan commences.

Bolton Library and Museum Services will not release any object for Loan Out until written evidence of the borrower's insurance arrangements has been received.

Natural History specimens which are sent to the borrower by post, must be sent Special Delivery with a specified value to ensure that they are insured in transit.

Objects displayed at community libraries and Bolton Town Hall are covered by Bolton Council's Fine Art Policy (Loan Out agreement not required).

Objects lent to Horwich Heritage Centre are covered by Bolton Council's Fine Art Policy (Loan Out agreement required).

N.B. According to the Standard Conditions of the Loan Out agreement, it is the borrower's responsibility to arrange and pay for suitable transport to and from the venue and to ensure that objects are insured in transit. On occasion however, Bolton Library & Museum Services may agree to transport the objects, and in such cases the objects will be insured by Bolton Council's Fine Art policy (see Loans In policy notes for insurance in transit).

8. Security

A TMS Loans Out record with a unique loan number will be created for each agreed loan out. This record will contain links to records in the Objects and Constituents modules. All loans information will therefore be accessible via the object's catalogue record and the borrower's details, as well as the loan number.

For full details of TMS database security please refer to Cataloguing Policy Notes.

All paper documentation relating to a loan will be filed by TMS loan number.

Where items from other collections not on TMS (such as archives) are loaned a loan record with a unique number will still be created on TMS with a list of items attached to the loan

9. Data Protection Act 2018

It is necessary for name and address data to be recorded in the loan record as part of the contract between the museum and other parties. Access to personal information about living individuals held on the TMS system will be restricted. The processing of personal data will comply with the principles of the Data Protection Act 2018.

10. Monitoring and Review

Museum Access Officers, Collections, Archives, Local Studies & Aquarium, Team Leader: Museum Access, and the Senior Management Team are responsible for monitoring compliance with this policy.

The Policy will be subject to regular review, usually every 5 years or sooner in line with any new guidance that may be published.