

Loan Agreement and Records (Full)

■ Documentation: General Requirement

The Museum Standards Programme requires that all applicants have a Documentations Procedural Manual. This manual defines procedures related to documenting the collection.

A Procedural Manual is a set of clear instructions that describe how a museum records, maintains, and secures information it holds about its collections. It sets out the documentation procedures and practices of a museum so that information about its documentation system is available to all museum staff, ensuring accountability, consistency and continuity of practice. A Procedural Manual must be reviewed on a regular basis to maintain its currency.

4.10 ■ Please submit the loan-in agreement procedure defined in the Documentation Procedural Manual. Please submit a copy of the museum's loan agreement for in-coming loans.

■ This is a Minimum Standard for Full Accreditation. Questions 4.11 and 4.12 also relate to this Minimum Standard. See also Question 1.7.

Please enclose the loan-in agreement procedure and the relevant additional documents along with your Application Form.

■ Requirements

- (i) Applicants must have written procedures for borrowing (loans in) defined in the Documentation Procedural Manual.
- (ii) All objects on loan must be recorded. Recording can be in the master database or loans register. Files for loans should be created to contain all relevant information, (e.g. relevant correspondence, loan agreements, receipts).
- (iii) Applicants must designate the authority for all loans.
- (iv) All loans must be for a fixed period. Long term loans may be renewed on a regular basis. This allows for regular checks on condition etc. and enables the museum to keep details of the lenders and borrowers up to date.
- (v) Loans must be formalised with a loan agreement between both parties. The purpose of a loan should be recorded on the loan agreement. Applicants must submit a generic loan agreement for different types of loans (e.g. loans to the museum's collection, temporary loans for exhibition).

■ Guidelines

- A. Applicants should give details on the procedures of recording different types of loans.
- B. The loans in procedure defined in the Documentation Procedural Manual should include:
 - (a) Assigning a loan number
 - (b) Purpose of loan (e.g. display, research).
 - (c) Loan authorisation responsibilities
 - (d) Statement of condition of loan
 - (e) Statement of standard of care provided
 - (f) Statement of information (e.g. facilities report)
 - (g) Negotiation of conditions of loan (including any special environmental, security, handling or display requirements)
 - (h) Loan maintenance requirements (e.g. loan checks, application for renewal of long-term loans)

- C. Each **loan in** should have a permanent record of information including:
- (a) Loan agreement(s)
 - (b) Ownership
 - (c) Identification of the object
 - (d) Dates of the loan
 - (e) Valuation
 - (f) Insurance/indemnity details
 - (g) Authorisation
 - (h) Cost and responsibilities
 - (i) Reproduction and copyright
 - (j) Specific requirements for scientific or research loans (e.g. where destructive analysis may be required)
 - (k) Receipts (acceptance and return)
 - (l) Location of loan
 - (m) Condition report (beginning and end of loan)
 - (n) Acknowledgements

4.11 ■ Please submit the loan-out agreement procedure defined in the Documentation Procedural Manual. Please submit a copy of the museum's loan agreement for out-going loans.

■ This is a Minimum Standard for Full Accreditation. Questions 4.10 and 4.12 also relate to this Minimum Standard. See also Question 1.7.

Please enclose the loan-out agreement procedure and relevant additional documents along with your Application Form.

■ Requirements

- (i) Applicants must have written procedures for lending (loans out) objects defined in the Documentation Procedural Manual.
- (ii) All objects on loan must be recorded. Recording can be in the master database or loans register. Files for loans should be created to contain all relevant information, (e.g. relevant correspondence, loan agreements, receipts).
- (iii) Applicants must designate the authority for all loans.
- (iv) All loans must be for a fixed period. Long term loans may be renewed on a regular basis. This allows for regular checks on condition etc. and enables the museum to keep details of the lenders and borrowers up to date.
- (v) Loans must be formalised with a loan agreement between both parties. The purpose of a loan should be recorded on the loan agreement. Applicants must submit a generic loan agreement for different types of loans (e.g. loans to the museum's collection, temporary loans for exhibition).

■ Guidelines

- A. Applicants should give details on the procedures of recording different types of loans.
- B. The **loans out** procedure defined in the Documentation Procedural Manual should include:
 - (a) Assigning a loan number
 - (b) Reason for loan request (display, research etc.)
 - (c) Loan authorisation responsibilities
 - (d) Statement of conditions of loan
 - (e) Statement of standards of are required
 - (f) Exchange of information e.g. facilities report
 - (g) Negotiation of costs, couriers, transport, packing etc

- (h) Loan maintenance requirements (e.g. loan checks, application for renewal of long-term loans)
- C. Each **loan out** should have a permanent record of information including:
- (a) Loan agreement(s)
 - (b) Borrower
 - (c) Identification of the object including Accession Number
 - (d) Dates of the loan
 - (e) Valuation
 - (f) Insurance/indemnity details
 - (g) Authorisation
 - (h) Costs and responsibilities
 - (i) Reproduction and copyright
 - (j) Specific requirements for scientific or research loans (e.g. where destructive analysis may be required)
 - (k) Receipts (acceptance and return)
 - (l) Condition report (beginning and end of loan)

4.12 ■ Please give details of the system and submit the procedures for recording loans defined in your Documentation Procedural Manual.

■ This is a Minimum Standard for Full Accreditation. Questions 4.10 and 4.11 also relate to this Minimum Standard. See also Question 1.7.

■ Requirement

- (i) A loans database and/or loans register must be established and maintained.
- (ii) The system for recording loans must be separate from the system for managing the collection.
- (iii) The procedures for recording loans should be defined in a Documentation Procedure Manual