

# Practicalities of Loans Projects

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Weston Loan Programme with Art Fund Launch Event

Monday 30 October 2023



Supported using public funding by

**ARTS COUNCIL  
ENGLAND**

• Touring  
Exhibitions  
Group

# TEG (Touring Exhibitions Group)

**TEG is a non-profit sector support organisation dedicated to supporting individuals and organisations to develop temporary, touring and partnership exhibitions.**

Membership is open to everyone involved in developing, presenting and facilitating temporary, touring partnership exhibitions. Become a TEG member to:

- ✓ **Belong** to a strong sector network
- ✓ **Find** partners using TEG's online directory of exhibitions and venues
- ✓ **Promote** your touring exhibitions, partnership opportunities, venues, services and products
- ✓ **Access** best practice resources including our online Manual of Touring Exhibitions
- ✓ **Develop** and maintain your skills through our professional development programme
- ✓ **Network** at our annual TEG Connects event
- ✓ **Share** your expertise and contribute to TEG's research and professional development offer
- ✓ **Communicate** opportunities, news and jobs with other members



# Loans Projects

The rich and diverse collections of the UK's museums and galleries have the capacity to inspire, excite, educate and bring people together.

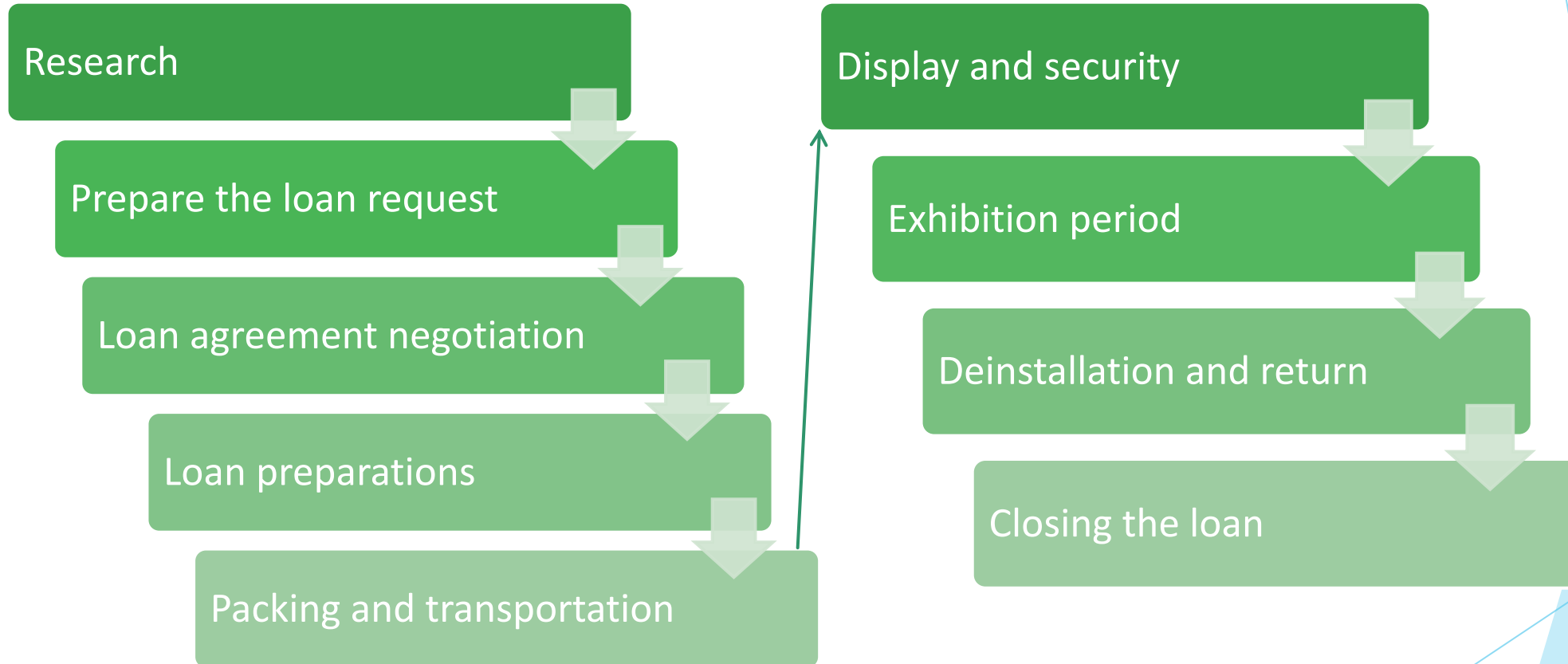
Loans projects enable these collections to be accessed and enjoyed by diverse audiences, create opportunities for new research and interpretations, and promote collections as a valuable public resource.



# The benefits of borrowing

- Audience development and diversification:
  - Make nationally significant objects accessible locally.
  - Introduce objects of interest to audiences not represented through your own collections.
  - Encourage new and repeat visits.
  - Stimulate a new learning or community engagement programme.
- Increase visitor numbers
- Increase organisational profile by association with national programmes and organisations e.g. press coverage.
- Enhance and compliment the display and interpretation of your collections; see objects in a new light.
- To catalyse research and a better understanding of your collections.
- Stimulate organisational strategic development, and/or enhancement of the building.
- Leverage funding.
- Develop staff and build confidence.
- Build partnerships.

# The Lending and Borrowing Process



# Research (borrower)

- ✓ Get clear on what you want to borrow and why
  - How will a loan enhance the project you are planning?
  - How will the loan and overall project help you meet your organisation's strategic objectives?
- ✓ Research suitable objects
  - Where can you research suitable objects for loan?
  - What factors affect the suitability of an object for loan?
  - Consider less famous objects, or those not usually on display.
- ✓ Research suitable lenders
  - Check the list of eligible lenders for the WLP
  - Be flexible if your ideal object is not available

# Prepare the loan request (borrower)

- ✓ Develop your case for borrowing
  - Clarify your **vision, aims** and **audience** for your loan and use this to write a 'Case Statement' to form the basis of your loan request.
  - Consider how the loan may benefit the lender, as well as your organisation, e.g. new research and interpretation, publication, reaching new audience, contributing to their KPIs etc.
- ✓ Leave enough lead in time
  - **At least** 12 months for submitting the formal request
  - **Recommend** 18 months for starting initial conversation
  - **Check** the borrowing timeline for the institution you wish to borrow from, as well as any loans moratorium due to capital projects etc.

# Respond to the loan request (lender)

- ✓ Check object documentation
- ✓ Check the provenance, legal ownership, rights, insurance value etc.
- ✓ Assess the object's condition, suitability and availability for loan
- ✓ Identify conservation, mount, display, environmental requirements
- ✓ Clarify the conditions of loan and any associated costs



# Loan Agreement Negotiation (lender & borrower)

- ✓ Initial contact with the lending institution
  - Discuss the potential loan (lender and borrower)
  - Share conditions of loan and estimated costs (borrower)
  - Informal agreement on loan duration (borrower)
- ✓ Formal loan request
  - Borrower submits formal loan request to the lender
- ✓ Loan Agreement > Review and Revision
  - Loan agreement drafted by the lender and sent to the borrower
  - Borrower submits documentation to demonstrate they can meet the loan conditions – facilities report, security supplement, display case supplement, temperature and relative humidity readings, insurance
  - Lender and borrower negotiate and agree the terms and conditions, and cost of the loan
- ✓ Loan Agreement Approval
  - Board approval
  - Loan agreement signed by both the lending and borrowing institutions

# Loan Preparations (lender & borrower)

## Borrower

- ✓ Arrange insurance (GIS or commercial)
- ✓ Prepare the exhibition / display space ready to receive the loan
- ✓ Make sure you have all of the detailed object information you need

## Lender

- ✓ Complete conversation work
- ✓ Prepare condition report
- ✓ Pack object for transport

## Together

- ✓ Agree on transport agent
- ✓ Coordinate transport logistics
- ✓ Coordinate installation schedule and virtual / in-person courier (if required)

# Object Information required

- ✓ Image
- ✓ Dimensions
- ✓ Materials/technique
- ✓ Valuation
- ✓ Credit line
- ✓ Artist/Designer/Maker
- ✓ Title
- ✓ Date
- ✓ Display information
- ✓ Environmental and security requirements
- ✓ Packing information and crate dimensions
- ✓ Handling instructions



# Packing & Transportation (lender & borrower)

## Information required to arrange transport:

- ✓ Packed size and condition of the object
- ✓ Time available and any scheduling deadlines
- ✓ Need to accommodate a courier/curator/ technician with the shipment
- ✓ Available routes and access
- ✓ Budget issues, including the availability of part-loads
- ✓ Requirements of the lender and the insurer

# Display and Security (borrower)

- ✓ Ensure you can meet the requirements of the lender and insurer

## **UK Government Indemnity Scheme (GIS):**

<https://www.artscouncil.org.uk/supporting-arts-museums-and-libraries/supporting-collections-and-cultural-property/government-indemnity-scheme>

*GIS exists for the UK public benefit.*

*The UK Scheme offers an alternative to the cost of commercial insurance.*

*Its purpose is to facilitate, for the benefit of the public within the UK, the provision of access to cultural objects on loan to UK institutions.*

- ▶ For general or environmental advice, email [government.indemnityscheme@artscouncil.org.uk](mailto:government.indemnityscheme@artscouncil.org.uk)
- ▶ For security specific advice, email [securityadvice@artscouncil.org.uk](mailto:securityadvice@artscouncil.org.uk)



# Direct Costs

- Loan fees (as for specific costs)
- Conservation
- Mounting, framing and/or glazing
- Object supports e.g. plinths
- Photographs and reproduction fees
- Condition checking
- Crating and other packing materials
- Transport agent fees and costs
- Travel, accommodation and expenses for couriers
- Insurance or minimum liability



# Exhibition Period (borrower)

- ✓ Minimise the handling of objects by agreeing a movement and installation plan
- ✓ Get to know the object before it arrives
- ✓ The lender may insist on doing all handling themselves Plan for this
- ✓ Make sure you have good images for digital / paper condition reports
- ✓ Condition reports should be signed by both lender and borrower
- ✓ Monitor loan during the display period
- ✓ Provide lender with regular updates - temperature, RH, light readings, visitor figures, VIP visits, event information etc.



# Condition Checking

- The condition of objects should be recorded by the lender and agreed by the borrower before they release the loan.
- This initial check of objects should be carried out by a conservator or other person qualified to identify clearly any problems associated with an exhibit.
- The condition should then be checked before and after each movement to identify any damage, deterioration or infestation.
- It may be appropriate for the borrower to contract a conservator to complete some or all of the initial checks, to ensure that appropriate and consistent information is gathered, and to save time and problems in future.
- The report should record the object condition in a consistent way throughout the loan, to minimise misunderstandings between the lender and borrower.



# Deinstallation, Return and Closing the Loan

- Lender may want to be present again to check and pack the object
- Condition report completed and signed again by both the lender and borrower, and returned with the object
- ✓ Minimise the handling of objects by agreeing a deinstallation and movement plan
- Object returned to lender and condition agreed/ signed off



# Communication & Working in Partnership

- ✓ Maintain regular, clear and open communication
- ✓ Approach lending and borrowing as a partnership activity, not a transactional exchange, to encourage museum of all sizes and scales to feel empowered.
- ✓ Be open, flexible and pragmatic in your approach to borrowing - remember lenders will also be under pressure and needing to manage staff time and resources
- ✓ Work together to find solutions. E.g. 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.

# Top Tips

- Leave enough lead in time
- Develop a strong case for borrowing
- Read documents carefully so you are fully aware of the terms, conditions and costs of borrowing
- Be confident in asking questions and negotiating the with lender
- Be flexible
- Consider the ways you could maximise the impact of the loan through public programming, co-curating, new approaches to interpretation, profile and advocacy work, start a longer-term collaboration, engage with new audiences and encourage repeat visits etc.

# Principles & Guide to Lending & Borrowing



Available on the TEG and NMDC websites:

<https://www.nationalmuseums.org.uk/what-we-do/contributing-sector/lending-and-borrowing-guidelines/>

<https://touringexhibitions.org.uk/research-resources/preparing-to-borrow/>

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# Contact Details + TEG Workshops

[www.touringexhibitionsgroup.org.uk](http://www.touringexhibitionsgroup.org.uk)

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Sam Isbell, TEG Operations Coordinator (inc. website) [coordinator@teg.org.uk](mailto:coordinator@teg.org.uk)

## Next TEG online workshops:

Exhibition partnerships and writing an agreement

Thurs 22 + Thurs 29 February 2024, 13:00 – 16:00

Introduction to Touring Exhibitions

Thurs 14 + Thurs 21 March 2024, 09:30 – 12:30



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