



## **Loans from the Museum of the History of Science, University of Oxford**

This document provides prospective borrowers with information on borrowing material from the Museum of the History of Science. It covers the general conditions that borrowers must fulfil, and clarifies the elements which need to be taken into account in preparation and budgeting. Any questions arising from this document should be directed to the Collections Manager of the Museum of the History of Science.

### **Loans policy**

Part of the mission of the Museum of the History of Science is to facilitate, assist, and promote scholarly and public knowledge of the history of science. In line with this mission, the Museum lends material from its collections to public exhibitions in the UK and overseas held in proper venues by recognised<sup>1</sup> museums and other educational, cultural and scientific bodies. The Museum does not lend to private and commercial organisations and exhibitions.

The Museum of the History of Science does not normally lend to inaugural exhibitions in new and untested venues. Where this is considered, the Museum will take steps to ensure that the venue can meet all agreed conditions of loan. This may involve an inspection visit prior to agreeing to the loan.

The Museum of the History of Science recognises its fundamental role in ensuring the safety, security and on-going preservation of its collections, and will lend only to organisations which are able to meet the necessary environmental, security, insurance, display and transport criteria.

All applicants are required to sign the Museum of the History of Science Outgoing Loan Agreement, a legally binding document indicating acceptance of the Museum's terms and conditions for loans. The signatory to this contract must be the chief executive of the institution applying for the loan. Touring exhibitions require a separate agreement for each separate venue.

All requests for loans are considered by the Museum's conservator, who advises on the suitability of the material for loan, any remedial work required and the conditions necessary for safe display and transportation. These conditions and requirements are notified to prospective borrowers, who must provide evidence of how they will be met. Material is not lent if it is inherently weak, or if it is likely to be at excessive risk from travel, handling and environmental changes. The presence of specific hazards, such as asbestos, mercury, lead, radioactivity, chemical agents, or sensitive material, such as human remains, may also preclude the loan of an item.

Loans are agreed for specified periods of time. The maximum length of loans to short-term exhibitions is normally four months. Applications for extended periods are subject to special

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<sup>1</sup> as defined by ICOM Statute article 2, para. 1, and which, in the UK, have received at least accredited status through the MLA or an associated regional agency.

stipulations, are agreeable for one year in the first instance, and, if conditions continue to be met, subject to a three year rolling review.

Loans to touring exhibitions are considered, but raise particular concerns and require special considerations.

Loans from the Museum collections are authorised by the Museum's governing body, the Visitors, in the light of recommendations by the Museum's Collections Committee. The following criteria are applied to each request:

- the preservation needs of the object
- the presence of hazards or sensitive material
- the resources available to process the loan
- the significance of the exhibition to the promotion of the history of science and related fields
- the significance and centrality of the object to the exhibition, and its relevance to the theme
- the impact of the absence of the object on research and the Museum's own public programmes.

The decision of the Visitors is subject to the Museum's requirements for security, insurance, transportation, environment and display being met during subsequent negotiation. The Museum reserves the right to withdraw from an agreement to lend at any stage should these conditions not be met.

There is no formal limit to the numbers of items requested, but this is normally influenced by the size of the items, the number one courier can deal with in transit and at the exhibition venue. More than five items normally require more than one courier.

The Museum of the History of Science makes a charge for the administration and essential preparation and conservation work involved with each loan. This represents a contribution to the full cost of lending, and helps meet the conservation costs of the request. The Museum reserves the right to make a charge for aborted loans where preparatory work has already begun.

### **Making a loan application**

All applications must be submitted with as much lead time as possible, to allow for adequate processing of the loan. Requests made with insufficient lead time will be refused.

Initial enquiries should be made to the Director, Museum of the History of Science, Broad Street, Oxford, OX1 3AZ, UK, to the Archivist or the Librarian, depending upon the nature

of material. The Museum will comment on the availability and suitability of the object at this stage and provide information on the Museum's Conditions for Loans.

### **The formal request**

The formal application for the loan must be made to the Director, Archivist or Librarian in writing at least *six months* prior to the date when the item is required for UK loans, and at least *nine months* for overseas loans. Applications received after these dates cannot be considered.

The loan application letter should include the following information:

- title and dates of the exhibition
- place of the exhibition
- Museum Inventory numbers, Library shelfmarks or archive reference and title of the item(s) being requested; for books, the opening for display should be indicated.
- name(s) of the exhibition curator(s)
- description of the premise or purpose of the exhibition
- information about the catalogue (general contents, name of publisher)
- assurance that all costs (loan fees, packing, shipping, insurance) will be paid by the borrower

The Collections Committee will then review the loan application and recommend a decision to the governing body, the Visitors, who give final approval. The Collections Committee meets every four weeks, and the Visitors each February, May and November.

Prospective borrowers will be informed by letter from the Director of the outcome of their application. Where the loan application is successful they will be asked to sign and return the Museum of the History of Science Loan Agreement and to complete three standard questionnaires. These relate to general facilities, security and display at the loan venue, and should include environmental data, display case specifications and a layout of the planned exhibition space.

At this stage the Museum of the History of Science will provide the borrower with an estimate of costs for conservation treatment, display mounts, and packing. All correspondence from this point is with the Collections Manager.

### **Confidentiality and security**

The Museum of the History of Science wishes, subject to the UK Freedom of Information Act, to maintain confidentiality of information relating to the loan application and movement of collections. The Museum therefore requires that confidential information should be passed

only to employees who are directly involved in the loan. The borrower is expected to ensure confidentiality from their own employees involved in the loan.

## **Museum of the History of Science Conditions for Loan**

### **1. Security**

Venues must be able to satisfy the internationally recognised standards of security and fire, and provide adequate safeguards against loss or damage from all potential causes. The Museum of the History of Science routinely requests a report on loan venues from the UK MLA National Security Adviser. Additional security measures, such as case or object alarms may be requested by the Museum of the History of Science, the cost of which must be met by the borrower.

All objects must be exhibited in a secure display case, which meets the Museum of the History of Science specifications for security and environmental conditions. Exceptions may be made for framed and glazed material, which must be secured to a wall with mirror plates and security screws, or other agreed fittings. Outsize items, too large to fit in a display case, require special considerations.

Twenty-four hour invigilation of the loan by security staff is normally required, although use of intruder-detection alarm systems during closed hours may be considered acceptable. Staff trained in security must be in attendance whenever the exhibition is open to the public, and during installation and de-installation. During installation only those individuals directly involved in the preparation of the exhibition may be admitted into the exhibition space and preparation areas.

The borrower must notify the Museum of the History of Science promptly of any theft at the venue, which occurs while Museum of the History of Science items are on loan, even if Museum of the History of Science items are not affected.

### **2. Insurance**

All loans from the Museum of the History of Science must be fully insured at the borrower's expense for 'all risks' from the moment the item leaves the Museum to the moment of its return, to the value of the item determined by the Museum of the History of Science. Items cannot leave the Museum of the History of Science unless adequate insurance cover is in place and satisfactory evidence has been presented to the Museum. Cover must include loss and /or damage caused by acts of terrorism, riot, civil commotion, piracy and hijacking.

For loans within the UK, we accept cover provided by commercial insurance companies and through the UK Government Indemnity Scheme. In the case of commercial cover, the borrower must supply the Museum with the detailed terms not less than six weeks in advance of the loan in order that the Museum may establish whether the cover is adequate and that no exclusion clauses raise concern. Final proof of cover, naming the University of Oxford (for its Museum of the History of Science), and where relevant, other third parties, as an insured party, and the separate items with their agreed valuations, should be in the form of a certificate of insurance, a letter addressed directly to the Museum from the broker, or, in the

case of a local authority, a letter of confirmation from the Local Authority Treasurer. This must be received at least two weeks prior to the departure of the loan.

For international loans, the Museum of the History of Science may at its absolute discretion accept indemnity cover under a national indemnity scheme. The certificate of indemnity must be deposited with the Museum at least two weeks before the date of departure from the Museum. Overseas commercial insurance may be used. In either instance, the Museum requires to see the detailed terms not less than six weeks in advance of the loan in order that the Museum may establish whether the cover is adequate and that all exclusion clauses are acceptable. Final proof of cover, naming the University of Oxford (for its Museum of the History of Science), and where relevant, other third parties, as an insured party, and the separate items with their agreed valuations must be received at least four weeks prior to the departure of the loan. In the case of touring exhibitions, a single policy must cover all exhibition venues and all transportation.

The Museum of the History of Science reserves the right to arrange its own insurance at the cost of the borrower.

The borrower may be required to meet the costs incurred in the commissioning of a professional insurance valuation. The Museum of the History of Science reserves the right to re-value loans at any time to take into account changes in market value.

### **3. Immunity from seizure**

In countries where immunity from seizure statutes and/or regulations are in force, it is the responsibility of the borrower to provide the appropriate certificates of immunity or exemption from seizure, prior to the departure of the loaned object(s). Where the borrower has failed to do so, liability for any consequent loss to the Museum of the History of Science will lie with the borrower.

### **4. Prevention of illicit trade**

In line with the International Council of Museums Code of Ethics, the borrower warrants, covenants, represents and agrees that it has no reasonable cause to believe that any object forming part of the exhibition in which the objects loaned under this Agreement will be displayed has been stolen, illegally exported or illegally imported from its country of origin, as defined by the UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, 1970.

### **5. Environment**

All objects require particular and stable levels of relative humidity, temperature, light and ultra-violet for safe display. The specific conditions required for the items on loan are notified to prospective borrowers, who must provide information on how these will be achieved and maintained for the duration of the loan.

In order to assess the quality of environmental control at the venue, readings for relative humidity and temperature, both ambient, and within the display case to be used, must be

provided for the equivalent period of the previous year. Records of actual temperature and humidity may be requested at intervals during the loan period.

In the instance of 'new-builds', or venues which have undergone major refurbishment, the Museum of the History of Science requires at least six months data in advance of installation to provide reassurance that conditions have stabilised. Readings will then be required on a monthly basis until the return of the loaned object(s).

The borrower must maintain the environmental conditions agreed with the Museum of the History of Science for the duration of the loan. Borrowers are expected to be equipped to record continuously both ambient and 'in-case' temperature and relative humidity, and should also possess an illuminance meter for monitoring light and ultra violet levels. If problems arise with the maintenance of the agreed conditions, the Museum of the History of Science must be alerted immediately for advice on possible courses of action. If the agreed conditions do not improve, the Museum reserves the right to withdraw the loaned object(s) from the exhibition.

In addition to specific conditions, the loaned object(s) must not be placed at any time in close proximity to sources of concentrated heat, cold or strong air currents (e.g. radiators, dehumidifiers, air-conditioning outlets or intakes).

In areas of heavy pollution, active measures must be taken to exclude or reduce levels of gaseous pollution. Where a mechanical ventilation system is in use, a high standard of dust filtration will be required.

The Museum of the History of Science must approve all methods and materials used in the display of its loaned object(s). This includes display case construction and display arrangements within cases, hanging surfaces and supporting or fixing mechanisms. Full details must be submitted to the Collections Manager with the facilities reports.

All materials used in the construction and the internal fitting of display cases must be agreed in advance with the Museum of the History of Science. Textiles or materials used to line display cases must be tested and approved by the Department of Scientific Research at the British Museum. Only water-based emulsion paints may be used. All coatings, adhesives and paints used in the construction of display cases or hanging surfaces must have *at least six weeks* curing time prior to installation. Evidence of uncured paints and coatings at installation will result in delays in installing the loan until the appropriate curing time has elapsed. The borrower will be expected to meet any resulting courier and transport costs.

The borrowing institution must carry out regular inspections of the exhibition area and display cases during the loan period to prevent insect infestation.

## **6. Display**

### *Objects*

All three dimensional objects, including books, must be displayed in a locked, museum-standard display case which conforms to the requirements of the Museum of the History of Science (detailed specifications are available from the Collections Manager).

Object supports must conform to the Museum's requirements and the Museum's preference is for these to be made by the Museum's technician in consultation with the borrower. In the case of books, appropriate cradles will be supplied at the borrower's expense.

In certain exceptional circumstances where an object is particularly large, it may, at the discretion of the Museum of the History of Science, be displayed outside a case protected by a plinth and barrier. The Museum may then require additional security protection. The Museum may require the borrower to provide information about handling equipment, floor loadings, and access routes (including dimensions) as well as trained staff for heavy, large or awkward objects, or objects needing special handling.

### *Unframed flat items (eg archives, photographs, maps, ephemera)*

All unframed flat items must be displayed in a locked, museum standard display case, which conforms to the requirements of the Museum of the History of Science (detailed specifications are available from the Collections Manager). Items will be supplied ready window-mounted or strapped to a card support, at the borrower's expense.

### *Framed items*

Framed, glazed items may be displayed outside a display case securely fastened to the wall using mirror plates and security screws, or lockable fittings for large items. Mirror plates will be supplied and fitted by the Museum. The type of lockable fittings for larger items must be agreed with the Museum of the History of Science Collections Manager. Unglazed framed items must be protected inside a display case.

## **7. Packing and Transportation**

All arrangements for the packing and transportation of loan items must be made in consultation with the Museum's Collections Manager, who must agree the dates, method of transport, the route and agent(s) used.

All packing of loans is carried out by Museum of the History of Science Conservation staff to museum specifications and the Museum is generally able to provide museum standard transport cases. In some instances, for example with heavy or outsize items, specialist packing by art handlers and the commission or hire of new cases, may be necessary. The art handlers must be approved in advance by the Museum of the History of Science, who will supervise all packing. The costs of new crates and packing will be met by the borrower.

The dates for despatch and return of objects must be as close as practicable to the opening and closing of the exhibition. Transport must be by the most direct route. Any planned stops and collections from other institutions must be discussed and agreed in advance.

The transport company used must have demonstrable and appropriate experience in the transport of fragile and valuable objects, and their employees must be trained in the handling and packing of museum objects. New or unknown transport companies proposed by the borrower will be assessed before being agreed by the Museum of the History of Science.

The Museum expects the vehicle used, whether owned by the company or the borrower, to meet the standards for transportation under the UK Government Indemnity Scheme (Government Indemnity Scheme' National Heritage Act 1980, Section 16). These include solid sides and roof, a windowless freight compartment separate from the cab, with separate locking, air-ride suspension and climate control capable of maintaining 18-22 °C.

The vehicle must have a minimum of two drivers and be capable of taking a courier in comfort. The drivers must be equipped with mobile phones for communication en route and to deal with emergencies. The transport company must have procedures and equipment in place for dealing with emergency situations. The vehicle must be equipped with solid fixings and straps and blankets, so that crates and cases can be properly secured and cushioned.

The vehicle must never be left unattended. Where collections from other institutions have been agreed, except for the actual period of loading, the doors of the vehicle must be kept closed for reasons of security and to maintain the internal environment.

For international loans, the agents employed, both in the venue country, and in the UK, must have proven ability and appropriate experience of all aspects of the movement of valuable and fragile material between institutions and across international frontiers. The Museum requires that small objects travel by air, hand-carried by the courier with additional plane seat(s) booked to accommodate the loan on the flight. Where this is not possible loans must travel in the hold on the same flight as the courier. For loans to France, Belgium and the Netherlands, travel by road using Eurotunnel may be acceptable.

For loans travelling by air in the hold, the authorised agent must have tarmac and warehouse clearance at airports to enable monitoring of the loan, or where local security arrangements make this impossible, close relationships with airport security to enable effective monitoring of the loan. When separated from the loaned object(s), the Museum of the History of Science courier must be kept regularly informed of movements until they join the flight. A representative of the borrower, or the borrower's agent, must meet the courier at the point of entry to the host country, and be present at departure to ensure a smooth transfer.

Every effort must be made by the borrower or their agent to avoid unpacking of items for customs or security inspection en route. Customs and security inspections should be arranged, where possible, before departure of the loaned object(s) from the Museum of the History of Science and before departure from the exhibition venue through a 'Hand Search' and the issue of a security certificate. Where this is not possible, appropriate arrangements must be made with the airport and carrier to avoid opening the case whilst passing through airport



security. This may involve a separate security escort onto the aircraft and use of security seals with supporting documentation. The Museum courier must be informed immediately if a case is required to be opened en route. A separate room and appropriate security must be provided and the Museum courier must be present at all times.

The Museum of the History of Science reserves the right to specify the shipping agent and transport programme. The Museum will not authorise a loan where the transportation arrangements may subject the loaned object(s) to unsatisfactory conditions.

## **8. Couriers**

All items on loan from the Museum of the History of Science are courier-accompanied, that is they are escorted by a member of the Museum's staff from the moment they leave the Museum to the moment of installation at the loan venue, and from de-installation to their return. The Museum of the History of Science courier has the full authority of the Museum in making decisions to ensure the safety and security of the item and to terminate a loan if in his/ her judgement the agreed conditions have not been met.

All courier arrangements must be approved by the Museum of the History of Science. A number of couriers may be required for loans involving more than one object or transportation crate.

The number of nights' accommodation for the courier will be determined by factors such as the length of the journey, the number of loan items, acclimatisation time for the material and the installation process. The courier will remain with the loan until they are fully satisfied that all agreed conditions have been met.

One nights accommodation and two days' expenses are required for UK venues over 500 miles from the Museum and a minimum of two nights' accommodation and three days' expenses for loans to Europe. The courier requirement for loans to the east coast of North America is a minimum of three nights' accommodation and four days expenses. For loans to the west coast of North America, to Asia and Australasia, couriers should have a minimum of four nights' accommodation and five days expenses. Business class transport is required for couriers on the accompanying leg. Business class is required inbound and outbound to long-haul locations. All tickets must be fully flexible.

The borrower must meet all courier transport, accommodation, subsistence and insurance costs. The courier's per diem must include the days of travel, as well as time at the venue, and arrangements must be made for this to be given to the courier on arrival.

## **9. Installation and De-installation**

On arrival at the exhibition venue the transport crates may **only** be opened under supervision of the Museum of the History of Science courier. If an object has been in transit for more than 8 hours, it may be required to remain in its crate to acclimatise for 24 hours before unpacking.

The courier will unpack, handle and install the loaned object(s). Staff from the borrowing institution trained in object handling may handle Museum of the History of Science loans with the agreement of the courier. The courier must be present at all times.

On unpacking, the condition of the loaned object(s) must be agreed and signed off by both the courier and the borrower with reference to the condition report prepared by the Museum of the History of Science prior to departure. A copy of the condition report will be left with the borrower. The loan will be left in the care of the borrower when the courier is content that all agreed conditions are in place, the loan is installed and the display case locked, or items are secured as agreed. A receipt will be signed to this effect.

Following installation, display cases containing Museum of the History of Science loans must not be re-opened, or items unscrewed from walls until the Museum of the History of Science courier is present. For items within display cases, this means that labels, graphics and all other objects planned for the case, including other loans, **must** be in position prior to the Museum of the History of Science installation. Keys to the display case and security screw fittings must be stored securely for the duration of the loan.

In the event of an emergency the Museum of History of Science must be informed immediately and permission given for removal of items by appropriately trained staff, and storage in a secure place. No treatment whatsoever may be undertaken without prior approval of the Museum of the History of Science. The Museum of the History of Science conservator may be sent at the borrower's expense to assess the damage or to carry out remedial work.

At de-installation of the exhibition, following removal from the display case or wall, loan items must be re-checked (against the condition report) by the courier and the borrower before re-packing. If all is in order, the courier will then provide the borrower's representative with a form of receipt.

For small-scale UK loans, the Museum of the History of Science courier will remove the transport crate, returning with it at de-installation. Where this is not practical, the borrower will be asked to provide suitable storage at the venue. The sealed crate must be stored in a secure, waterproof and pest-free environment maintained between 18-24°C temperature and 45-58% RH. Where these levels are not achievable, the crate must be allowed to acclimatise to this range at least two days before re-packing.

The condition of the loan may be monitored by the Museum of the History of Science through a visit by the Museum's conservator. With long-term loans on a three year renewal cycle, this will automatically occur every three years prior to re-negotiation of the loan. The Museum of the History of Science conservator will check the condition of the item and that all agreed measures are in place. The cost of such visits will be charged to the borrower.

Access to Museum of the History of Science loans by Museum of the History of Science appointees must be allowed at all reasonable times (provided reasonable notice is given).

## **10. Care and treatment of objects**

The loan must be returned in the same condition as received by the borrower.

No conservation, remounting, repair or any other treatment to a loan may take place without prior consultation and written permission of the Museum of the History of Science. No item may be removed from a frame without written approval from the Museum of the History of Science. The borrowing institution must be prepared to cover the costs of sending a member of Museum of the History of Science staff to inspect and conserve objects if this is deemed necessary.

Any instance of deterioration or damage to an object on loan must be reported immediately to the Director of the Museum of the History of Science. The borrower must also notify the insurer or indemnifying authority and the police, as appropriate. No treatment whatsoever may be undertaken without prior written approval of the Museum of the History of Science. The Museum of the History of Science conservator may be sent at the borrower's expense to assess damage or carry out remedial work.

No smoking, eating or drinking is permitted in any storage, preparation or display area housing loans from the Museum of the History of Science.

## **11. Photography and Reproduction**

Loans from the Museum of the History of Science may not be filmed, photographed, video-recorded or televised through any method without the prior written permission from the Museum's Director and the written assignment of the copyright in the work(s) to the University of Oxford (for its Museum of the History of Science). Where permission is granted, display cases may not be opened and items handled, and no artificial light other than flash must be used. An appropriate member of staff from the borrowing institution must supervise the operation.

Photographs showing general views of the exhibition including the loaned object(s) may be taken for press and publicity purposes, however any lamps used must not be placed closer than two metres from the respective loaned object(s).

Photography or imaging by members of the public of items belonging to the Museum of the History of Science once they are on display is permitted on condition that this is for private use only.

Only photographs and images supplied by the Museum of the History of Science may be used for reproduction purposes. These may be ordered by the borrower in advance via the Museum website; [www.mhs.ox.ac.uk](http://www.mhs.ox.ac.uk). The Museum of the History of Science permits the borrower to include such reproductions of the loaned object(s) in the exhibition catalogue, leaflets, publicity material and education resources accompanying the exhibition. Images may also be used on the borrowing venue web page, but only in low resolution.

## **12. Acknowledgement**

The credit line 'Museum of the History of Science, University of Oxford' must be used in all object labels.

The credit line '© The University of Oxford for its Museum of the History of Science [*Year of first publication*]' must be used in the exhibition catalogue and with all reproductions for all objects.

## **13. Exhibition Publications**

A copy of each exhibition publication should be supplied free of charge for deposit in the Museum of the History of Science Library.

## **14. Exhibition Admission for Museum of the History of Science staff**

Where an admission fee is charged for entry to the exhibition, this should be waived for staff of the Museum of the History of Science.

## **15. Costs**

The following costs shall be borne by the borrower:

- transport and packing of the loan, including agents' fees, vehicle hire, and commissioning or hire of packing cases
- supply of object supports
- insurance for the loan object(s)
- travel, insurance, accommodation and subsistence for the Museum's courier(s)
- reproductions of the loan items made by the Museum for security or conservation reasons

In addition to the above, the Museum of the History of Science makes a standing charge (currently £30 per item) in order to assist with the cost of loan administration and condition reporting. There is a further charge (currently £30 per hour) for conservation work essential for the loan and for the production of supports. A charge may be made for courier time travelling with the loan and on site for installation and de-installation. All charges may be subject to UK VAT.

The Museum reserves the right to make a charge for aborted loans where preparatory work has already begun.

## **16. Alteration in exhibition dates**

Any proposed change in previously agreed exhibition dates, including extensions and early or temporary closures, must be submitted in advance to the Museum of the History of Science for approval. The Museum of the History of Science reserves the right to cancel or curtail

loans in the event of the borrowing institution changing previously agreed loan dates, and to withdraw loans during periods of temporary closure.

### **17. Early Termination**

The Museum of the History of Science reserves the right to cancel or recall a loan if the borrower defaults in its responsibilities as stipulated in the Outgoing Loan Agreement, the Museum of the History of Science Conditions for Loan, or in the event of an emergency. The travel and subsistence costs of couriers collecting the items belonging to the Museum of the History of Science shall then be paid by the borrower as if the loan had terminated normally.

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