

The University of Texas Libraries  
The University of Texas at Austin

Policy No. 41a  
Exhibition Loan Policy

March 5, 2014  
rev. September 4, 2015

*This policy was revised March 5, 2014 by the Exhibition Loan Task Force:*

*Beth Dodd, Chair*

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Revisions were approved by the University of Texas Libraries Executive Management Team, November 2014.

*Original policy was prepared from June-December 1999 by the Loan of Library Materials for Exhibition Purposes Task Force*

*Beth Dodd, and Adan Benavides, co-chairs*

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*Submitted to Carole Cable and Jo Anne Hawkins in December 1999; reviewed by Carole Cable, Jo Anne Hawkins. Drew Racine. Sue Phillips, Dennis Dillon, Kay Sewell.*

*Changes were made to the text and the document was sent to the UT Office of Business Affairs. Approved by Michael Vandervort, January 27, 2000.*

*Approved by Harold W. Billings, Director of University of Texas Libraries. January 31, 2000.*

## Revision History

The Exhibition Loan Committee will review the policy and ensure its promotion annually.

Revision activities include:

- Adding new recommendations as information becomes available.
- Modifying the policy as a result of exhibition loan experiences.
- Verifying that information listed is current and accurate.
- Update the electronic version stored on the Staff Web (<https://sharepoint.lib.utexas.edu/ts/preservation/loans/Exhibition%20Loan%20Documents/Forms/AllItems.aspx>).

The Exhibition Loan Committee will keep a record of the revision history:

DATE	DESCRIPTION OF CHANGE	AUTHOR	EXPECTED DATE OF NEXT REVISION
6/10/15	Added EMT approval information; Rev sharepoint url.	Dodd	June 2016
9/4/15	Added condition 16.	Dodd per Martin/Sparrow	June 2016

## EXHIBITION LOAN POLICY

The University of Texas Libraries recognizes that its collections contribute to research and intellectual exchange, and that exhibitions are one way to reach a broader audience. It is the policy of the University of Texas Libraries to lend material for exhibitions promoting a common educational and scholarly mission.

As steward, the University of Texas Libraries is committed to the preservation and care of its collections of record and will lend material only to institutions with exhibition programs and with professional staff proficient in handling and exhibiting the items safely. A decision to lend will depend on several factors including the condition and value of the object, its current scholarly demand for ongoing research, the facilities and expertise of the borrowing institution, and the timeliness of the request.

Loan requests must be received in writing on institutional letterhead, and signed by the Director of the borrowing institution. Loans are not made to individuals. Formal requests should be received at a minimum of six months prior to the shipment of the loan (for loans leaving the United States, a minimum of one year). Lead-time is necessary to ensure adequate time for condition assessments, conservation preparation, and processing of the loan request. Insufficient lead-time may be cause for refusal of the loan. Large or complicated loan requests will require a longer advance notice.

A facility report for the exhibition venue must be provided by the Borrower. A separate facility report for each venue is required if the item(s) will be traveling. The *American Association of Museums Standard Facility Report* (ISBN 0-931201-55-1) is strongly preferred. If a different facilities report format is used, it must provide detailed information on all topics listed under Appendix II, "Facilities report," in *Guidelines for Interlibrary and Exhibition Loan of Special Collections Materials* (Rare Books and Manuscripts Section, Association of College and Research Libraries, <http://www.ala.org/acrl/standards/specialcollections>). If needed the University of Texas Libraries can provide a blank form to the Borrower that addresses the required topics.

The Borrower will insure the requested item(s) at the Borrower's expense under an all-risk, "wall to wall" policy with no deductibles, subject to the standard exclusions of fine arts commercial insurance. Failure to provide a certificate of insurance from an established carrier in advance of shipment will result in the cancellation of the loan.

An *Exhibition Loan Agreement* serves as the memorandum of understanding between the Borrower and the University of Texas Libraries (the Lender). Through signature of both parties, the loan is governed by agreement of the following conditions:

General terms:

1. Terms of the exhibition loan pertain to items listed on the *Exhibition Loan Agreement* and the affiliated *Item Assessment Report for Exhibition Loan*.
2. All items will remain in the possession of the Borrower for the time specified on the *Agreement*, and all timelines agreed upon by the Borrower(s) and the Lender will be followed. Any changes or extensions in the lending dates must be requested in writing and approved in advance by the Lender. Certificates of insurance must match the lending dates. New certificates of insurance must be received in advance before any extensions in lending dates can be approved by the Lender. In the event of the exhibition period being shortened, the Lender must be informed immediately in writing.
3. All obligations pertaining to care, handling and storage of the items are equally binding on all institutions participating in the exhibition for which the items have been loaned.
4. The Borrower will be responsible for all applicable costs associated with the loan including, but not limited to: matting, framing, conservation treatment, packing and transportation, insurance, courier expenses, photography, customs broker and fees, and any additional costs agreed to in advance by both the Lender and the Borrower.
5. The loan is governed solely by the Lender's agreement. If any conditions cannot be met during any part of the duration of the loan, the Lender must be contacted immediately.

Care and Preservation:

6. The Borrower must verify receipt of all items listed on the *Exhibition Loan Agreement*. Each item should be received in the condition described in the *Item Assessment Report for Exhibition Loan*. Any discrepancies must be noted on the *Item Assessment Report for Exhibition Loan* and communicated to the Lender immediately.
7. Items covered by the loan agreement shall remain in the condition in which they are received. They shall not be altered, cleaned, restored, repaired, retouched, removed from the frame or other housing, or altered in any way except with written permission of the Lender.
8. The Borrower will maintain the temperature, relative humidity, and lighting conditions specified for each loaned item as stated in the *Item Assessment Report for Exhibition Loan*. Regular monitoring of the exhibit material is required. The Borrower will notify Lender immediately if unable to maintain the specified conditions for any loaned item.
9. All loaned items must be stored in climate controlled, secure areas on the Borrower's premises when not on exhibition.
10. The Borrower agrees to maintain constant and adequate security precautions against fire, theft, vandalism, improper handling, insects and other hazards, in both exhibition and storage areas. A security system is required 24 hours a day, and during open hours, the exhibition space must be monitored.
11. No smoking, eating, or drinking is allowed in the galleries or storage areas where items are displayed or stored. Exceptions must be requested, in writing, at the time of the loan request.

Handling, Packing and Transportation:

12. Unpacking, installation, de-installation, packing and all other handling must only be

conducted by qualified, trained professionals. *Volunteers or interns may not handle or move the items.*

13. The Lender will prescribe packing, and the Borrower will pay all costs. Unpacking and re-packing must be carried out in secure and environmentally controlled areas on the Borrower's premises. The same packing methods, instructions and exterior label warnings must be used for all transits. Items will be re-packed in the Lender's original or similar packing materials for return shipment. Packing materials retained for return shipment must be stored in environmentally controlled areas of the Borrower's premises throughout the duration of the loan.
14. Transportation will be prescribed by the Lender, and arranged and paid in full by the Borrower. The Borrower will arrange return packing and shipment by the same manner specified by the Lender unless otherwise agreed to in writing and in advance of the return.
15. The Lender reserves final approval for all packing and shipping arrangements. The Lender must be notified immediately via email when a shipment has been received and upon return.
16. Loan items are never to be placed directly on the floor of any transport facility for storage. Items must be placed on a stable surface and elevated by at least 4 inches off the floor.
17. An *Item Assessment Report for Exhibition Loan* will be sent with each loaned item. Immediately after each unpacking and prior to each re-packing, the condition of the item must be reviewed. If the condition of the item is different from that described in the *Item Assessment Report for Exhibition Loan* and/or in the case of damage to an item, the Borrower must notify the Lender immediately by telephone, followed by written and visual documentation. If damage occurs in transit, all packing material must be saved. The *Item Assessment Report for Exhibition Loan* must be returned with the item at the end of the loan.

Insurance:

18. The Borrower will maintain insurance coverage under a standard, all-risk, Fine Arts insurance policy on a wall-to-wall basis, for the lending date span and stated value specified on the *Exhibition Loan Agreement*. Coverage must guarantee payment of claims, with no deductibles for depreciation as well as restoration and related costs, in United States currency.
19. For loans to international institutions, unless otherwise agreed upon, the Borrower must purchase coverage through underwriters for the University of Texas at Austin.
20. Prior to the start of the loan, the Borrower will provide the Lender with a certificate of insurance covering the full loan period.
21. The University of Texas Libraries must be notified in writing at least thirty (30) days prior to any cancellation or change in the Borrower's policy. Any lapses in coverage, any failure to secure insurance and/or inaction by the University of Texas Libraries will not release the Borrower from liability for loss or damage.
22. Damages, whether in transit or on the Borrower's premises and regardless of responsibility, must be reported immediately to the University of Texas Libraries. Should damage occur during transit, the University of Texas Libraries and the carrier shall be notified at once with

written and visual documentation. Packing materials will be inspected.

Publicity and Photography:

23. Permission to reproduce images of any loan item in publication and/or for publicity purposes in connection with this exhibition must be obtained in writing from the Lender. Permission must be obtained from copyright holders and must be on file before materials are shipped to the Borrower.
24. Except for detail views, all reproductions for any purpose must show an unobstructed view of the entire item without cropping or bleeding. If a detail is reproduced, this fact must be clearly indicated in the caption. No reproduction of any kind may be tinted or otherwise altered.
25. Exhibition labels must identify each item on display with the credit line as provided on the *Exhibition Loan Agreement*. Credit must also be given in all publicity concerning the exhibition.
26. Two complimentary copies of the exhibition catalogue, brochures, or publicity issued in connection with the exhibition must be provided to the University of Texas Libraries.

### **EXHIBITION LOAN PROCESS**

Loan requests, both external and internal, are vetted through the University of Texas Libraries Exhibition Loan Committee. The Committee reviews, recommends, and shepherds a loan as described in the accompanying *Exhibition Loan Guidelines, no. 41b*, ensuring the safety, security, preservation and promotion of items until they are returned.

The Committee includes the following roles: Coordinator, Conservator, and Special Collections stewards. The Committee is also charged with the management of each loan's documentation throughout the loan process. Upon the completion of the loan, original hard copies will be transferred to the Library Administration for retention in its permanent file per the University of Texas at Austin Records Retention Schedule<sup>1</sup>. For items in special collections, convenience copies will be kept at their home repository. Electronic files are kept at:

<https://sharepoint.lib.utexas.edu/ts/preservation/loans/default.aspx>. The Committee is also charged with the annual review and promotion of this policy to ensure that it meets the current mission and needs of the University of Texas Libraries.

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<sup>1</sup> University of Texas at Austin Records Retention Schedule defines Permanent as: A record that possesses enduring legal, fiscal, or administrative value and must be preserved permanently by the University. Exhibition records are recommended for permanent retention and include: exhibit descriptions, borrower's letter of request, Exhibition Loan Agreement forms, Item Assessment Reports, insurance documentation, facility reports, publicity or advertising, and any other related documentation deemed part of the life of the item loaned.