

QMN PROCEDURE: Procedure for Outward Exhibition Loans

(Cultures & Histories and Biodiversity & Geosciences Programs)

1.0 PURPOSE

The purpose of this procedure is to ensure that a standard process is followed in processing items proposed for outward exhibition loans; addressing the concerns of all stakeholders.

2.0 SCOPE

This procedure applies to the Curatorial and Collection Management staff of the Cultures & Histories Programs, and staff of the Conservation Section. (For the purposes of this document, due to the different staffing structures in the two Programs, the term “Program Staff Member” refers to the Biodiversity & Geosciences Program and can mean either a Curator or Collection Manager whichever is relevant to the specific Collection area; while “Curator” or “Collection Manager” is specific to the Cultures & Histories Program.)

This procedure outlines the steps involved before, during and after items have been determined for outward exhibition loan. This procedure must be read in conjunction with the *QM64 Loans Policy (Inward & Outward) (Cultures & Histories and Biodiversity & Geosciences Programs)*.

3.0 DEFINITIONS

Accessioned items are objects or specimens or specimen lots that have been incorporated into the ‘State Collection’ through the formal process of Registration (numbering), and Accessioning (recording locality and other contextual information in an electronic database).

Documentation is supporting evidence, recorded in a permanent manner using a variety of media (paper, photographic, electronic etc.), of the identification, condition, history, or significance of an Object, Specimen, or collection. This encompasses information that is inherent to the individual Object/Specimen and its associations in its environment as well as that which reflects processes and transactions affecting the Object/Specimen (e.g. Accessioning, documenting, loaning, analysis, treatment, etc.). Documentation is an integral aspect of the use, management and preservation of an Object, Specimen or collections.

An **Item** is an interchangeable term used for an Object, record, Specimen or Specimen lot.

Lot is the term used to define a group of Specimens or Objects recovered from the same location at the same time, which are registered, accessioned, stored and

documented together for efficiency reasons based on manageable quantities of Objects (e.g. multiple specimens of insects, fishes, small crustaceans).

Non-collection item is any item which is not part of the State, Research or Reserve Collections and includes items such as mannequins, object supports designed for specific objects, replicas etc.

An **Object** is a human-made item, often manufactured or created from naturally-occurring materials and made for use in a cultural context. This term differentiates human-made collection items from those acquired in nature (Specimens).

QM means the Queensland Museum

Research Loans are temporary transfers of Collection Items to and from QM (loans in, and loans out, respectively), for the purposes of authorised research.

Reserve Collection items are held by various programs and campuses of QM specifically for the purpose of public display, teaching, public education and or interpretation, non-scientific loans, etc. The former group of items do not meet QM criteria for state significance, are not accessioned into the state collection, nor intended to be held in perpetuity.

State Collection is the official collection of Items registered by QM through Acquisition or Transfer. It is the sum total of all Accessioned items of scientific or historical significance vested in the Board of QM.

4.0 ACTIONS

4.1 Exhibition Loan Request

Representatives from the borrowing institution may contact Program staff directly to ascertain information regarding specific collection items prior to formalising a loan request. The borrower may already have in mind the material they wish to borrow (if they are familiar with the collection) or they may need assistance in determining items which might fit within their broader exhibition theme. The Program staff member or Curator directly associated with the type of collection material being considered must assist the borrower in this role. If the potential borrower needs to see collection material in order to determine specific items for loan, it is the responsibility of the Program staff member or Collection Manager to provide physical access to collection material.

The borrower is then required to make a formal request for loan by submitting their requirements in writing to the Queensland Museum's (QM) CEO. (If for some reason a formal loan request comes directly to a staff member, they must forward the request to the CEO.) The CEO's Executive Officer must pass a copy of this request to the relevant Program Head or Campus Director who will ensure that it is passed directly to the appropriate Program staff member. The CEO's Executive Officer will then draft a

Standard Template Response Letter for the CEO to sign in response. This letter acknowledges receipt of the request and informs the potential borrower that due consideration of the loan will be required (at the Program's next quarterly meeting), and that they will be contacted when a decision has been made. It also states that 12 months is required as a minimum period for processing a loan, commencing from the date the acknowledgement letter is sent.

The Curator, based on the list of proposed loan items supplied by the borrower, must complete the first section of a *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)* and either attach copies of record sheets printed from Vernon, or create a list in their own portfolio in the Vernon system and write the location on the Form.

(It is important that the Curator ensures information in the Vernon database relating to each item requested for loan is correct and as complete as possible. This must be done in relation to the principles of due diligence as outlined in *QM305 Due Diligence Policy* and *QM306 Due Diligence Procedure*, specifically in relation to the Museum's legal ownership of the items in question.)

The Collection Manager or Program staff member is responsible for ensuring that Conservation staff are informed about the final decision as soon as possible after the decision has been made to enable staff to begin object preparations.

(NOTE: If an individual item proposed for external loan is valued over \$250,000, approval to borrow the item (or to extend or renew an existing loan) must be sought separately from the Queensland Museum Board via a Briefing note submitted to the CEO and official Agenda submission to a QM Board meeting.)

The Collection Manager or Program staff member is responsible for contacting the borrower to inform them of QM's decision and what items have been approved for loan.

The Form should then be passed on (either in hard copy or electronically) to the Collection Manager, who is responsible for overseeing the entire loans process from this point on. (In the case of an exhibition loan relating to the Biodiversity & Geosciences Collection – the Curator and Collection Manager may in effect be the same person, and if this is the case the form can be completed accordingly.)

4.2 Loan Assessment

If the borrower has not borrowed material from QM before or if they have borrowed material previously, but that was more than 12 months ago, then the next step is for the Collection Manager or Program staff member to send out either a *QM67 Facility Report* (international or large national institutions, institutions operated by large City or Regional Councils) or a *QM68 Venue Report* (small regional institutions, Aboriginal or Torres Strait Islander community groups and keeping places) depending on the size and nature of the borrower. The covering letter accompanying the report must indicate that the loan

assessment process cannot proceed until this report has been completed by the borrower and returned to the Museum. It must also be made clear to the borrower that under no circumstances are they to 'on lend' or transfer material to other institutions or other locations without the express written permission of QM.

When the Collection Manager or Program staff member receives the returned and completed *QM68 Venue Report* or *QM67 Facility Report*, they must provide a copy to the Senior Conservator; and if the loan includes Aboriginal and Torres Strait Islander collection material, a copy of the *QM68 Venue Report - Section 5* to the Manager, Aboriginal and Torres Strait Islander Community Relations. They must then proceed to complete the Collection Management section of the *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)*, utilising information from either the current *QM68 Venue Report* or *QM67 Facility report*, along with specific information from Vernon in relation to the items selected. Once completed the form must then be passed to the Conservation Section for their assessment of the venue and items. (This information will assist in indicating what type of items may be appropriate to be loaned to the potential borrower, based on their ability to meet certain benchmark requirements from a security, staffing and environment point of view, as well as providing specific information on the requirements of the items which have been selected.)

The Collection Manager or Program staff member is responsible for ensuring the Form is passed to the relevant staff and for collating the total costs. Once all of the information has been collected, the Collection Manager or Program staff member must pass the Form to the Program Head (exhibition loan proposals will be considered at each quarterly Program meeting where a final determination will be made as to whether a loan will proceed or not). The Program Head will then sign the Form and pass it back to the Collection Manager or Program staff member for final processing.

The Collection Manager or Program staff member is responsible for ensuring that Conservation staff are informed about the final decision as soon as possible after the decision has been made to enable staff to begin object preparations.

(NOTE: If an individual item proposed for external loan is valued over \$250,000, approval to borrow the item (or to extend or renew an existing loan) must be sought separately from the Queensland Museum Board via a Briefing note submitted to the CEO and official Agenda submission to a QM Board meeting.)

The Collection Manager or Program staff member is responsible for contacting the borrower to inform them of QM's decision and what items have been approved for loan.

4.3 Loan Processing

The Collection Manager or Program staff member must then prepare an *Outward Exhibition Loan Agreement in the Vernon Collection Management System*, taking relevant information from the database and ensuring the standard 'Conditions of Loan'

on the agreement accurately reflect any restrictions or specific requirements made by the Curator, Collection Manager or Conservator on the *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)*. (If there need to be changes or additions made to the 'Conditions of Loan', this can be done in the Word Version of the *Outward Exhibition Loan Agreement* when it is printed from Vernon. Or alternatively a request for change can be submitted via Service desk to the Collection Management System's staff.)

The agreement must then be sent to the borrower, with a covering letter including a summary of all potential costs in the form of a written quote. (It must also be explained in the letter that until the *Outward Exhibition Loan Agreement* has been signed, acknowledging agreement to all costs, conditions and requirements of the loan, and returned to QM along with documentary evidence of insurance coverage, the loan will not proceed.)

If a borrower changes their mind about what items they wish to borrow, after the agreement has been signed, by either requesting items to be removed, added or alternative items supplied the *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)* must be recirculated for comment, new costs to be determined and a new agreement issued.

Once a completed, finalised and signed *Outward Exhibition Loan Agreement* has been received from the borrower, the Collection Manager or Program staff member in conjunction with the Conservation section must commence preparing the items for loan in accordance with *QM52 Guidelines for Collection Packing & Transport (Cultural Environments Program)* or *QMN200 Guidelines for Packing and Transport (Biodiversity & Geosciences Program)*.

When the loan is ready to be despatched, the Collection Manager or Program staff member must complete a *QM71 Outgoing Receipt* retaining a copy for the files and sending the original with the items, or despatching it separately in the mail at the same time that the items are despatched. It is then the Collection Manager or Program staff member's responsibility to follow up with the borrower to ensure that they complete the bottom half of the receipt and return it to the Museum to indicate that they have received the items (encouraging them to keep a copy for their own files).

(All documentation associated with the loan must be scanned and attached to the relevant record in Vernon and hard copies must be kept in the appropriate file located in the Collections and Research Records area (whether that is the designated CRRC located in the QM&S Library or a campus / Collection specific repository) in accordance with *QM319 Collections and Research Record Keeping Procedure*.)

The Collection Manager or Program staff member is also responsible for putting together a combined, itemised Invoice for all associated loan costs and sending it to the borrower for payment.

4.4 Extending Loans

QM does not as a rule lend items beyond 12 months. However, extensions may be granted if the following conditions are met by the borrower, prior to the current exhibition loan expiring:

- At least 8 weeks notice is provided prior to the extension being required.
- The borrower completes a condition report, if they have qualified conservators on staff to do so prior to the loan expiring; template supplied by QM Conservation section on request. (Alternatively it may be necessary for a QM Conservator to visit the borrower to assess the items, in which case all costs must be agreed to by the borrower prior to extension.)
- If any conditions have changed since the submission of the borrowers last *QM68 Venue Report* or *QM67 Facility Report*, a new report must be provided.
- The Curator or Program staff member will determine if another valuation is required, in which case all costs must be agreed to by the borrower prior to extension.

In order to process a loan extension the Collection Manager or Program staff member should commence another *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)*, and follow the process as outlined in section 4.2 above. If the extension to the loan is approved, the Collection Manager or Program staff member will issue a new exhibition loan agreement.

In the case where a borrower wishes to return only some items from an original loan and retain others, a new loan agreement for the retained objects needs to be created. The original loan should be annotated with 'Partially Returned' with a note explaining what was returned and what was retained, along with a reference to the new loan agreement.

4.5 Maintaining Exhibition Loans

It is the Program staff member or Collection Manager's responsibility to manage QM outward exhibition loans, including the accurate maintenance of database records in the Vernon system. Once a loan period is one month from expiring, it is the responsibility of the Collection Manager or Program staff member to liaise with the borrower regarding packing and delivery arrangements for the return of the loan (in accordance with *QM52 Guidelines for Collection Packing and Transport (Cultures & Histories Program)* or *QMN200 Guidelines for Packing and Transport (Biodiversity & Geosciences Program)*).

4.6 Returning Loans

Once an exhibition loan has expired and the items have been returned, the Collection Manager or Program staff member should issue a *QM70 Incoming Receipt*, scanning and attaching it to the relevant record(s) in Vernon.

If the carrier returning the items requires a receipt on delivery, the top half of the *QM70 Incoming Receipt* can be completed confirming the delivery of the package(s), and a copy given to the carrier.

The items must be taken to the Conservation Section (if returning to QM&S and MTQ, or to an agreed quarantine area if at the other campuses) for assessment and quarantine purposes, and at least 24 hours acclimatisation before the packages are opened. Once the packages are opened and the exact contents have been confirmed by the Collection Manager or Program staff member as the actual items which were despatched, the bottom half of the form can be completed by the Collection Manager or Program staff member and a copy sent to the borrower to confirm safe delivery of the individual items.

4.7 Lending Reserve or non-collection material

In the case of The Workshops Rail Museum (TWRM) (where a Reserve Collection as well as part of the State Collection are maintained) the following procedure will be followed for the loan of Reserve objects.

Objects from the Reserve Collection may be lent to institutions, community groups and private individuals at the discretion of TWRM Collection Manager in conjunction with the Program Head. Completing *Venue or Facility Reports* and obtaining curatorial approval prior to lending Reserve Collection objects is not required. Borrowers are however required to sign an *Outward Loan Agreement* following the same procedure as for the loan of State Collection objects outlined in point 4.3.

Reserve Collection objects are recorded on an Excel spreadsheet, and this should also be utilised for tracking purposes to record objects going out on loan and returning from loan.

If non-collection items are to be included as part of the loan they should be tracked and recorded in whatever system is currently utilised to monitor their location and use, whether that is a specific spreadsheet, database or through Vernon.

4.8 Material transferred between QM campuses

When objects normally stored at one campus are required by another campus for exhibition or display, for short or long term, they should be governed by the same process as an external loan as stated in the *QM64 Loans Policy (Inward & Outward) (Cultural and Biodiversity & Geosciences Programs)*. This means that a *QM69 Exhibition / Internal Transfer Loan Assessment Form (Proposing and Renewing Loans)* must be completed.

In order to ensure these internal transfers between campuses are supported in a timely manner, sufficient lead time is required which is in keeping with the available resource levels at the source campus.

In addition, the same requirements that apply to external borrowers will apply to internal transfers regarding conditions of loan (environmental requirements, display parameters,

security etc.) and care of collection material (objects will need to be assessed by Conservation prior to transit to ensure their stability and methods for packaging and transport must be in accordance with the *QM52 Guidelines for Collection Packaging and Transport (Cultures & Histories Program)*). All costs associated with packaging consumables, specialist treatments (if external conservation assistance is required) and transport (both to and from a campus), must be borne by the campus requesting the objects.

In addition, campuses must also complete a *QMN Collection Security Assessment Form* in relation to new galleries, displays or exhibitions, which must be sent to the **QMN Collection Security Team (CST)** who is responsible for determining the level of security required, prior to objects going on display. The team is comprised of a cross section of staff from around the Museum, with a diversity of knowledge and experience. The CST will assess potential risks posed to any objects on display, and advice on the design, layout and appropriate physical barriers required in each situation, based on the significance, value and portability of the objects involved.

As with external loans, this material must not be ‘on loaned’ or transferred to other institutions or locations without the campus first discussing the proposal with the Collection Manager at the campus where the items are usually located.

4.9 Responsibilities

The Code of Conduct prescribes standards for the ethical behaviour of QMN staff and volunteers. In all activities relating to the Collections an employee must not be in conflict of interest with the purposes of QMN. If a conflict develops, the interests of QMN will take precedence.

Responsible officers:

- Collection Managers / Curators – are responsible for implementation of the QMN Outward Loans Procedure in accordance with **due diligence**, and in regard to international loans for ensuring adherence to PCOL regulations.
- Program Head – is responsible for assessing potential risks and who will ultimately decide whether a loan goes ahead.

5.0 POLICY BASE

This procedure has been developed in accordance with the principles of the Queensland Museum Collection Policy

6.0 DOCUMENT HISTORY

VERSION	DATE	AMENDMENT
1.1	20040929	Original document
1.2	20071010	Original document converted to corporate template
1.3	20071120	Conversion of data to new draft incorporating present processes – for comment

1.4	20071219	Draft document incorporating comments by the CM Forum
1.5	2010-04-19	Draft document incorporating changes due to use of Vernon system in automatically generating loan documents
1.6	29 th March 2011	Reviewed and updated
1.7	16 th August 2013	Updated with new branding information
1.8	July 2014	Biannual review and update
1.9	August 2015	Incorporation of Biodiversity & Geosciences into the same document and conversion to "Exhibition" specific rather than just "Outward" loans.

7.0 AUTHORISATION

Approved by:	Prof. Suzanne Miller
Title:	CEO, QMN
Approval date:	December 2016
Signature:	

8.0 MORE INFORMATION

Procedure owner/creator:	Head, Collection Services
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9.0 REVIEW PROCESS

This document will be reviewed every 2 years and at other times if any significant new information or legislative or organisational change warrants a change to this document.

Once printed this document is no longer a controlled document.