

Action Plan

for the EU Promotion
of Museum Collections' Mobility
and Loan Standards

Working Group 1
Loan Administration and Loan Standards

July 2007

PREAMBLE

The Action Plan for the EU Promotion of Museum Collections' Mobility and Loan Standards, which was developed in 2006 during the Austrian EU Presidency and finalised during Finland's EU Presidency, summarises in six chapters the major issues regarding loan traffic. At a convention in Helsinki in July 2006 international working groups were formed to discuss and attend to various issues via e-mail.

Working group 1, the members list of which is attached, attended to the first chapter "Loan administration and loan standards" and was co-ordinated by the Federal Monuments Office in Vienna. In order to work as efficiently as possible, proposals for the documents to be drawn up were prepared by a small Austrian working group jointly with representatives of important relevant institutions (ICOM Austria, *Museumsbund* – Austrian Museums Association, *Restauratorenverband* – Austrian Association of Conservators/Restorers). The drafts were sent to all international members of the working group with a request for comments and proposals for changes, which were then incorporated in the documents. At a meeting in Vienna in March 2007 the results available by then were discussed and co-ordinated for the convention, which was held during the German EU Presidency in Munich in April 2007.

The working group focused on the difficult task of drawing up loan forms, in particular the Facilities Report and the Conditions Report. It was not necessary to draw up a model loan agreement, since that is already being developed within the scope of NEMO. The forms presented here should be considered recommendations and the first stage of a development process, which, in the end, could lead to modules in a digitalised form that will be available throughout Europe. For more detailed explanations please see the introductions to the proposed forms.

As regards the ICOM Code of Ethics a letter was sent to ICOM International, which is also attached for your information. For the convention of ICOM International, which is planned to take place in Vienna in August 2007, the organisers plan, inter alia, to report to all members of ICOM on the European initiative for the Action Plan. In this connection there will also be an opportunity to explicitly emphasise the necessity of dealing with this issue in more detail in the Code of Ethics.

The subject of art transportation is currently dealt with by an international working group within the scope of CEN International in Brussels. Before attending to this issue any further, it would be sensible to wait for their results.

The recommendations set forth in the "General Principles on Administration and Loans" (Appendix 4, Lending to Europe) were taken account of in the papers presented.

The most difficult task seems to be to create and communicate clear responsibilities to all professionals involved in the loans process, and publish loans procedures and forms online. The clear definition of responsibilities within the museums, above all, depends on the staff available at the individual institutions. It is not possible and hardly makes sense to define or demand responsibilities of registrars or restorers if the specific museum has no such experts. The procedures and responsibilities for loans may, therefore, greatly differ from each other. Apart from museum structures, also the diversity of the objects requires procedures adapted to the specific situation.

For that reason (in the discussions at Vienna and Munich all members of working group 1 agreed in this respect) there is no general "optimum" solution for this issue since, ultimately, when handling loans it is a question of morality and professional ethics of all persons involved in the loan process that long-term preservation of objects and minimisation of risks must prevail in a conflict with economic, representative, political or scientific interests. In times of rapidly increasing loan traffic it becomes more and more difficult to live up to this responsibility. Therefore, intensive, including public, general communication is necessary to create awareness of that problem within and outside the immediate circle of experts.

Vienna, July 2007

Eva-Maria Höhle

on behalf of all members of working group 1

WORKING GROUP 1 MUSEUM COLLECTIONS' MOBILITY

HÖHLE Dr. Eva-Maria, Chair Generalkonservator	Bundesdenkmalamt Hofburg, Säulenstiege 1010 Wien AUSTRIA	Tel. +43 (0)1 53415-200 Fax: +43 (0)1 53415-5200 generalkonservator@bda.a
JANIŠTINOVÀ Dr. Anna, Co-Chair	National Gallery CZECH REPUBLIC	janistinova@ngprague.cz
AIGNER Mag. Carl Direktor	NÖ-Landesmuseum Kulturbezirk 5 3109 St. Pölten AUSTRIA	Tel. +43 (0)2742 90 80 90-116 Mobil: 0676 88 01 01 61 aigner@landesmuseum.net carl.aigner@chello.at
ASSMANN Mag.Dr. Peter Direktor	Landesmuseum Linz Museumstrasse 14 4010 Linz AUSTRIA	Tel. +43 (0)732-77 44 82-42 p.assmann@landesmuseum- linz.ac.at direktion@landesmuseum-linz.ac.at
BUHAGIAR Carmen Michelle	The Superintendence of Cultural Heritage 138, Melita Street Valletta VLT 08 MALTA	Tel. +356 2123 0711 c-michelle.buhagiar@gov.mt
CHOULIA-KAPELONI Suzanna Head of Dep. Of Exhibitions & Museological Research	Hellenic Ministry of Culture, Directorate of Museums, Exhibitions & Educational Programmes Bouboulinas 20 106 82 Athens GREECE	Tel. +30 210 8232006 protocol@teme.culture.gr
COSTA Paulo Head of Collections Management Dept.	Instituto Português de Museus Palácio Nacional da Ajuda 1349-021 Lisboa PORTUGAL	Tel +351 21 365 08 26 Fax: +351 21 364 78 21 lpm.dsi@ipmuseus.pt
EMBERGER Dr. Ulrike	Bundesdenkmalamt Hofburg, Säulenstiege 1010 Wien AUSTRIA	Tel. +43 (0)1 53415-108 Fax: +43 (0)1 53415-5107 ausfuhr@bda.at

<p>FONTES BLANCO Fernando Luis Conservador de Museos</p>	<p>Servicio de Documentación Subdirección General de Museos Estatales Ministerio de Cultura Plaza del Rey, 1 28004 Madrid SPAIN</p>	<p>Tel. +34 9(1)/701 70 00 – EXT 32548 Fax: +34 91/701 73 84 fernando.fontes@mcu.es</p>
<p>GONZÁLES MARTÍN Guillermo</p>	<p>Subdirección General de Promoción de Bellas Artes Plaza del Rey, 1 28004, MADRID SPAIN</p>	<p>Tel.+34 1 701 70 00 (Ext. -32558) Fax: +34 1 701 73 82 guillermo.gonzales@mcu.es</p>
<p>HAGEDORN-SAUPE Prof. Monika Deputy Director</p>	<p>Institute for Museum Research In der Halde 1 14195 Berlin GERMANY</p>	<p>Tel. +49 (0)30 8301 460 Fax +49 (0)30 8301 504 m.hagedorn@smb.spk-berlin.de</p>
<p>HOFMANN Mag. Christa</p>	<p>Österr. Nationalbibliothek Josefsplatz 1 1010 Wien AUSTRIA</p>	<p>Tel. +43 1 53410-368 od. 322 restaurierung@onb.ac.at</p>
<p>KARNER Mag. Doris.</p>	<p>Bundesministerium für Unterricht, Kunst und Kultur, Abt. IV/4. Ballhausplatz 5 1014 Wien AUSTRIA</p>	<p>Tel: +43 (0)1 53120-4403. doris.karner@bmbwk.gv.at</p>
<p>KRONENBERG Mechtild Geschäftsführerin</p>	<p>Deutscher Museumsbund e.V. In der Halde 1 14195 Berlin GERMANY</p>	<p>Tel. +49 (0)30 841095 17 Fax +40 (0)30 841095 19 office@museumsbund.de</p>
<p>MARCHANT Caroline Attaché</p>	<p>Ministère de la Communauté Française BELGIUM</p>	<p>caroline.marchant@cfwb.be</p>

<p>PUDNEY-SCHMIDT Birgid Freier Registrar</p>	<p>Registrars Germany Rosenstraße 63 40479 Düsseldorf GERMANY</p>	<p>Tel. +49/211/4911576 Fax: +49/211/4983655 pudney-schmidt@web.de</p>
<p>SCHAUERTE Prof.Dr. Günther Stellvertretender Generaldirektor</p>	<p>Staatlichen Museen zu Berlin Stauffenbergstraße 41 10785 Berlin GERMANY</p>	<p>Tel. +49 (0)30 266 26 11 g.schauerte@smb.spk-berlin.de</p>
<p>SPITERI Martin Manager Museums Development Projects</p>	<p>Heritage Malta Old University Bld. Merchants Street Valletta MALTA</p>	<p>Tel. +356 2295 4000 martin.d.spiteri@gov.mt</p>
<p>TOUSSAINT Jacques Conservateur en chief-Directeur du Service des musées en province de Namur</p>	<p>Hotel de Gaiffier d’Hestroy Rue de Fer 24 5000 Namur BELGIUM</p>	<p>Tel. +32 (0) 459 50 43 62 jacques.toussaint@province.namur. be</p>
<p>WADUM Jørgen Keeper of Conservation</p>	<p>Statens Museum for Kunst Sølvgade 48-50 1307 København DENMARK</p>	<p>j.wadum@smk.dk</p>

FACILITIES REPORT EUROPE

INTRODUCTION

The form is designed as a basic report which is intended to serve both the purpose of general investigation of framework conditions for exhibitions and special prerequisites of specific exhibition projects. The form must be suitable for museums of different types and sizes and allow easy handling also for museums that do not have a large number of staff for specific tasks in connection with loan traffic. That is why the form should be as short as possible, focus on the essential points and word the individual questions in such a way that different museum institutions will be able to answer them according to their situation.

First of all the form could be used by museums which have not yet developed a Facilities Report of their own. At the same time it could cause a lifting up of standards. In all institutions that have already developed their own Facilities Report it might be useful for further discussions. Although it would be an illusion to believe that the proposed version will lead to a harmonised form directly, it could be considered the first step into the right direction. A definitive standardisation seems only efficient when based on a digitised model, as it is impossible for a basic form of a Facilities Report of this kind to contain all detailed questions that may arise in connection with exhibitions. Therefore an additional detailed version is required which, structured in modules, presents in-depth details regarding every possible question. It should be available in digital form and retrievable in various languages for expedient Europe-wide use. If the form consists of different detail levels, different elements can be arranged individually according to the relevant case.

A comprehensive digital form covering all needs would have to be provided and maintained by an international institution (e.g. NEMO) on the internet. Drawing up a detailed digital Facilities Report requires a substantial amount of time and money which might be granted by the EU. Due to the timeframe the Mobility Working Group was not able to carry out such a project.

FACILITIES REPORT EUROPE

COMMENT

The Facilities Report Europe should be regarded as a basic version introducing the character of a museum as well as various aspects concerning exhibitions. The idea is that this basic form can be used for different types of museums, for smaller and bigger institutions and for various purposes. Every item must be filled in completely, every question must be answered.

FACILITIES REPORT EUROPE

Name and Address of the Institution
Logo, coat of arms

EXHIBITION INFORMATION:

Title of exhibition:	
Related Homepage/s:	
Duration of exhibition:	
From:	
To :	
Place of exhibition:	
Full address:	

ORGANISER/S' INFORMATION:

Main Organising institution :	
Homepage:	
Full Address:	
Phone/s:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Fax:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<i>Country code Area code Number</i>

CONTACT PERSON: CURATOR / KEEPER / REGISTRAR

Name:	
Position & Qualification:	
Full Address:	
Phone/s:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
e-mail:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Fax:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<i>Country code Area code Number</i>

CONSERVATOR – RESTORER / SUPERVISORY STAFF

Name &	
Phone/s:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
e-mail:	+ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	<i>Country code Area code Number</i>

INFORMATION REGARDING BUILDING

Please circle / underline your answer and answer related question if YES.

Do you plan any modifications of the exhibition area during the presentation?
YES NO

If yes, what kind of modifications?

Do you plan any modifications of the building before the start of the exhibition?		YES	NO
If yes, what kind of modifications?			
Is the building also used for other purposes?		YES	NO
If yes, for which ones?			
BUILDING TYPE, LOCATION AND GENERAL CHARACTERISTICS			
Location and type of building:			
Building materials/exterior and interior walls:			
Building materials/ceilings and floors:			
Former uses of the building:			
EXHIBITION AREA			
Detailed description of location and quality of the exhibition area:			
Specify details such as vehicle access, goods lift with dimensions, height and width of doors, covered loading bay:			
Is the exhibition room also used for other purposes If yes, for which ones?		YES	NO
Is food, drink or smoking ever permitted in the exhibition area?:		YES	NO

RESOURCES FOR HANDLING & PACKING			
<i>Please circle / underline your answer and answer related question if YES.</i>			
Who handles the loans? Specify position and qualification			
Are the loans put in intermediate storage?		YES	NO
If yes, where?			
Where are the loans (un)packed?			
Where are the materials for packing and transportation stored?			

Who deals with the condition reports of the loans?	
Are there conservation checks at regular intervals?	YES NO
What is their frequency?	

ENVIRONMENTAL CONTROL				
Temperature & Relative Humidity (RH) / in galleries / stores / packing areas				
What kind of temperature regulation do you have in autumn / winter?				
What kind of temperature regulation do you have in spring / summer?				
How is the RH regulated in autumn / winter?				
How is the RH regulated in spring / summer?				
What kind of airing / ventilation systems are installed?				
Control systems for temperature and RH.				
general:				
in the rooms:				
in the show cases:				
Type, level and intervals of calibration:				
Room temperature during spring / summer in °C?	<i>from</i>		<i>to</i>	
Room temperature during autumn / winter in °C?	<i>from</i>		<i>to</i>	
Relative humidity during spring / summer in °C?	<i>from</i>		<i>to</i>	
Relative humidity during autumn / winter in °C?	<i>from</i>		<i>to</i>	
What is the maximum usual variation percentage of temperature in the exhibition rooms within a 24 h period?				
in spring / summer?	<i>from</i>		<i>to</i>	
in autumn / winter?	<i>from</i>		<i>to</i>	
What is the maximum usual variation percentage of the RH in the exhibition rooms within a 24 h period				
in spring / summer?				
in autumn / winter?				
Do you monitor and record temperature and RH levels on a regular basis throughout the year? YES NO				
Do you have show cases with a self-contained air conditioning and RH control system? YES NO				
If yes, give more information:				
Lighting & UV-Radiation				
Type of lighting:				
Type of lighting in the show cases:				

Direct and / or Indirect:?	
How can you adjust your light levels (highest and lowest level)?	
Types of protective measures against light	
In the rooms:	
In the showcases:	
Do you have a light meter?	YES NO
Do you have a UV meter?	YES NO
How many hours per week are the loans exposed to light?	
Dust control	
How often are the rooms / parts of the room cleaned per week?	

SECURITY CONDITIONS	
Fire & Water	
Describe your fire protection systems including smoke detectors, heat detectors, sprinkler systems, etc.:	
What type of monitoring is carried out?	
Guarding & Invigilation	
Describe how the exhibition building and the objects are secured during PUBLIC HOURS:	
Number of staff in security:	
Qualification of staff:	
Describe your protection systems against robbery, intrusion, damage by vandals, etc	

Technical/electronic systems :	
CCTV:	
Intrusion detectors:	
Other types:	
Describe how the exhibition building and the objects are secured during closing hours.	
Number of staff in security during CLOSED hours:	
Qualification of staff:	
Technical/electronic systems :	
CCTV:	
Intrusion detectors:	
Other types:	
Are there security systems for special objects (barriers, security glass, show cases secured by automatic alarm etc.)?	

INSURANCE		
Insurance of your institution – include details of types of insurance packages		

COMMUNICATION	
How many PR staff do you have in the museum?	
Describe your PR (in general/concerning the exhibition):	
Describe your pedagogic/didactic program (in general / concerning the exhibition):	
Describe your scientific program (in general / concerning the exhibition):	

CONDITION REPORT

INTRODUCTION

As with the Facilities Report the main focus of the Condition Report should be on universal applicability. For practical reasons the form should be short (1 page) and suitable for a wide range of techniques as regards the objects but also provide room for special additional information. It must always be completed in full.

CONDITION REPORT

COMMENT

The Condition Report is part of or attachment to the loan agreement. The condition of the object and its ability to be lent have to be checked by a professional **before** consent to the loan. Conditions of loan such as the required quality and intensity of light, constant and controlled climate, instructions for installing and presentation and safety precautions have to be stated in the loan agreement. A brief summary of the necessary exhibition conditions in the condition report serves as a reminder. A photograph or a sketch can be attached or integrated into the verso of the form. Three dimensional objects should be documented by one photograph from each side. Details should be numbered, charted or clarified on the photograph or sketch.

The report is a general short version for different groups of material. It can be extended with object specific details.

CONDITION REPORT

Name and Address of the Institution

Logo, coat of arms

Signature/inv.nr.: _____

Crate number: _____

Material: _____

Dimensions: _____

Object: _____

Exhibition: _____

Lender: _____

Loan agreement number:

Nr. on loan list or shipping list: _____

Packing

Tissue paper

Air bubble wrap

climate controlled

other: _____

Polyethylene foil

Inner box

framed with glass/ acrylic glass

Paper

Crate

Instructions for installing/ presentation, safety precautions

Light: _____ Temperature _____ Relative humidity _____

Other: _____

see loan agreement for details

Handling with gloves

Object handling with courier only

No changes are to be made without the written permission of the lender.

General condition

good

damaged

conserved/restored

Detailed condition report reverse

Attachment

Writer of report/ Date: _____

Name/ Signature/ Date
for the lender

no change in condition

Name/ Signature/ Date
for the borrower

change in condition

Name/ Signature/ Date
for the lender

Name/ Signature/ Date
for the borrower

Confirmation of Return:

Name/ Signature/ Date
for the Institution

Sketch or photograph

- 1 no damage
- 2 conserved/restored
- 3 surface dirt
- 4 yellowing
- 5 faded
- 6 stains
- 7 mould
- 8 insect damage
- 9 distortion
- 10 scratches
- 11 detached parts
- 12 losses, missing parts
- 13 cracks
- 14 loose or flaking paint layers
- 15 tears
- 16 craquelure
- 17 retouching
- 18 old repairs
- 19 corrosion
- 20 abrasion
- 21 other damage

Additional Notes:

ICOM - CODE OF ETHICS

COMMENT

Within ICOM an international working group deals with issues of the Code of Ethics. Since the Code of Ethics is within the responsibility of ICOM and can therefore not be changed from “outside”, a letter was sent to ICOM International requesting that ethical issues in connection with loan traffic will be given more attention and resulting amendments will be made to the Code of Ethics.



BUNDESDENKMALAMT

Conservator General

A-1010 VIENNA
Hofburg, Säulenstiege
Phone +43-1-53415-0 or Ext.
Fax +43-1-53415-5200
generalkonservator@bda.at
www.bda.at

Vienna, 2007-03-27

ICOM International Council of Museums
Maison de l'UNESCO
1, rue Miollis
F-75732 Paris cedex 15
FRANCE

Dear Madam,

Dear Sir,

As you certainly know a group of experts from EU countries is working on a project entitled "Museum Collections' Mobility and Loan Standards" under EU Presidency activities, which is to lay the foundations for standardisation and simplification of museum loan traffic within Europe (Action Plan for the EU Promotion of Museum Collections' Mobility and Loan Standards). At a convention in Helsinki in July last year six international working groups were formed which attend to the main issues in this connection and have been asked to draw up a respective paper by June 2007. Austria has been assigned the task of co-ordinating contacts of museum experts, mainly in the form of e-mails, on the first chapter called "Loan Administration and Loan Standards", which is why I am contacting you on behalf of the said working group.

Our tasks include drawing up of "General Principles on Loan Administration and Loans" as well as "Standard Loan Forms" for a European Facilities Report and a Condition Report.

In the course of preparatory determination of subjects a revision of the ICOM Code of Ethics was also suggested as another key issue in this field. This extremely important document, which was drawn up by ICOM as the ethical foundation and guideline for handling museum collections and covers many areas of museum work, now lets it seem desirable that also the subject of loans be embodied more deeply in the so important Code of Ethics. This task is all the more urgent as statistics show that the number of loans and exhibitions has constantly risen in recent years, which take up more and more room in the work of museum institutions. The core issues which resulted from our discussions are the requirements regarding

preservation of objects and, in general, creating of awareness of loan conditions, including transport, exhibition environment with all relevant specific questions and preservation-related observance of loans. Since, as we have learnt, a separate working group within ICOM International deals with the Code of Ethics, I am taking the liberty of addressing you with the request of the international working group "Museums Collections' Mobility and Loan Standards" to give your attention to this issue, which, as we believe, is the order of the day in the light of recent developments.

The six current working groups will present their results during the German EU Presidency in June. I will be pleased to submit our share of the work to you as soon as the final version will be available.

Yours sincerely,

A handwritten signature in black ink, appearing to read "EM Höhle". The letters are cursive and fluidly connected.

Dr. Eva-Maria Höhle

Chair of the Working Group I "Loan Administration and Loan Standards"

EU-Promotion of Museum Collections' Mobility and Loan Standards

ART TRANSPORTATION

Concerning art transportation Working Group 1 restricts itself to forwarding the following information. At European level uniform minimum requirements for art transportation will, in practice, most of all be achieved by means of standards. CEN International in Brussels is in charge thereof. The working groups of CEN International draw up and co-ordinate bases throughout Europe, which will then be submitted to the national standards institutes and embedded in national standards by them. Currently, an international group called "Transportation and Packaging Methods" is working on standards regarding requirements for transportation and packaging methods and show cases. The working group, which is located in the "Art and Culture" committee, commenced work only recently and will in future be engaged in surveying the transportation standards currently applicable in the individual European countries.

Apart from such international activities, the national standards institutes may develop their own standards which, in turn, serve as basic documents for creating a European standard which may be incorporated in the work of European committees. An example of such a national standard is the ÖNORM [Austrian Standard] D 1000 "Transport Services - Requirements for Art Transportation".

As we have learnt, also ICOM International is considering to establish a Committee for Art Transports.

In principle, an accreditation of art transporters seems to make sense. What remains to be discussed and clarified is the question of the type of institution that could be in charge of accreditations and how such accreditations can be supervised and kept up-to-date.

In general it has to be mentioned that in specific cases of loans the specific transportation conditions will have to be specified by the responsible lenders.