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cover image:
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Connoisseurs of Prints, from the series New York City Life, 1905
Etching
Plate: 5 x 7 inches (12.7 x 17.8 cm)
Sheet: 9 3/4 x 12 5/8 inches (24.8 x 32.1 cm)
Philadelphia Museum of Art, Purchased with funds contributed by Lessing J. Rosenwald and
with the Katharine Levin Farrell Fund, 1956-35-63
FOREWORD

During the late 1960s the board of the Print Council of America (PCA) took under consideration the need for standard lending policies and procedures for museums that would reflect the distinctive characteristics and challenges of works on paper. Under the guidance of Eleanor Sayre of the Museum of Fine Arts, Boston, a set of guidelines was drafted and prepared for distribution in 1972, but for unknown reasons the project was shelved. The origins of the current publication may be traced to a later panel discussion on loan policies held at the Print Council of America’s 1988 annual meeting in Cleveland, which led the group’s president Jay Fisher to suggest that the PCA take on the publication of a standard code of practice for handling loans of works on paper. Verna Curtis, the moderator of the 1988 panel, would be joined by Suzanne Boorsch, Marjorie B. Cohn, and Margaret Morgan Graselli in compiling the manuscript. Their work was informed by a questionnaire sent to the PCA’s membership soliciting current practices and relevant advice. A draft of the Guidelines was circulated to the International Advisory Committee of Keepers of Public Collections of Graphic Art as well as the PCA’s board in 1992-1993, and the publication appeared in 1995 in an edition of 2,500 copies with a foreword by then-president Richard S. Field. It was circulated to the full membership of the Print Council as well as the Registrar’s Committee of the American Association of Museums and the International Keepers group. In 1998, the Guidelines appeared in a Japanese edition at the instigation of Michiaki Koshikawa, Curator of Prints and Drawings at the National Museum of Western Art in Tokyo. Until the first edition went out of print in 2014, the Guidelines for Lending Works of Art on Paper was given to all new members upon their election to the Print Council, and copies were also available for purchase by individuals and institutions outside of the organization.

Taking into consideration evolving practices and standards of the past two decades, this new revised edition was overseen by Joan Wright, the Bettina Burr Conservator in the Asian Conservation Studio, Department of Conservation and Collections Managements, of the Museum of Fine Arts, Boston. Several of her colleagues at the MFA contributed their time and expertise, including volunteer JoAnn Pinkowitz who transcribed the text from the original pamphlet; Elizabeth Byrne, Collections Manager for Preventative Conservation, who contributed to the section on LED’s and reviewed the lighting and environment sections and added some online references; Siobhan
Wheeler, Associate Registrar, who contributed to the sections on insurance, couriering, national and international loans, and reviewed the entire document and added some online references; and Jacki Elgar, Pamela and Peter Voss Head of Asian Conservation, who reviewed the final edit. I am also grateful to my colleagues at the Fine Arts Museums of San Francisco Debra Evans, Head of Paper Conservation, Victoria Binder, Associate Conservator, and Heather Brown, Mellon Fellow, for their many suggested revisions, and to Andrew Weislogel of the Herbert F. Johnson Museum of Art at Cornell University for his excellent proofreading.

James A. Ganz
President

FOREWORD TO THE 1995 EDITION

Several years ago, the Print Council of America, which represents the curators of works on paper in the United States and Canada, decided to set down the collective concerns of its membership about the exhibition and lending of such works. We shared with our colleagues in museums, libraries, and private collections a need for guidelines to further the best use and preservation of the objects in our care. Under Jay Fisher, then president of the Council, a committee was established to seek the advice of both curators and conservators. This report, facilitated greatly by many of our colleagues, was formulated and labored over by Suzanne Boorsch, Marjorie B. Cohn, Verna Curtis, Margaret Morgan Graselli, curators at the Metropolitan Museum of Art, Harvard University Art Museums, Library of Congress, and National Gallery of Art, respectively. The Print Council expresses its utmost gratitude to them for the painstaking effort they expended on the many drafts of this publication.

The very act of exposing works on paper so that they may be enjoyed and studied exacts a penalty: a measurable negative impact on the physical condition of the work. Everyone in the museum profession is torn between the need to preserve and the need to share. The issues one encounters in making decisions about exhibiting and lending works on paper are not always simple. There is always the difficult determination that weighs risks and known physical factors against political and institutional obligations. The following guidelines are offered in order to assist curators and others in making these
determinations for a great variety of objects – prints, drawings, watercolors, architectural drawings, photographs, miniatures, multiples, books, illuminated manuscripts, and scrolls. We hope that the guidelines will provide the basis for professional standards.

Our recommendations will consider several aspects of lending and exhibiting, including:

- the purpose and appropriateness of a request to exhibit or borrow;
- the adequacy of the facilities at the exhibiting site, including crucial matters of atmosphere and illumination;
- the appropriateness of travel for a given work of art;
- the various considerations of matting, framing, glazing, packing, crating, and shipping;
- the duties of the courier;
- the practice of loan fees, photography of borrowed objects, and complications of international loans.

In the long run, these types of decisions are matters of judgment. Each request must be decided on its own merits, and final authority must rest with the individual institution.

Richard S. Field

President
1
TO LEND
OR NOT TO LEND

1.1. GENERAL CONSIDERATIONS

While the primary responsibility of a custodial institution and its curator is to preserve an object in the best possible condition for as long as possible, it is also obvious that the cultural value of an object rests in its ability to be seen and studied and that its aesthetic value can be appreciated on exhibition only under conditions suitable for revealing its actual appearance. When an object is requested for loan, the curator, with the assistance of conservators and registrars, assesses the purpose for which it is being requested, the physical nature and condition of the object and the borrower’s ability to provide for the object’s safety and preservation. These considerations often oblige a curator and the custodial institution to weigh the value of preserving rare and valuable objects for the long term against encouraging their serious study and appreciation by various audiences in the present.

1.2. INDIVIDUAL INSTITUTIONAL POLICIES

All institutions must abide by restrictions on the loan of any object legally imposed by its creator or donor. In addition, specific regulations in some institutions may prohibit lending to exhibitions for which a special entrance fee is charged to benefit exhibitions, and/or to commercial galleries or other sites where works are offered for sale. Whereas one institution may reject a loan request because of such policy restrictions, another that does not have the same restrictions may decide to lend an object. Also, some institutions may have as a matter of policy a mandate to lend more freely on a regional or, in other cases, on a national or international basis due to established relationships (i.e.: “satellite” or “sister” museums).

1.3. LEAD TIME

 Concern for the physical protection of a work on paper requires that the most careful consideration be given to all factors involved. Thus, it is recommended
that curators require that a loan request be received at least six months in advance. However, most museums require twelve months, to give adequate time for review and processing of the request, preparation of the work, and arrangements for safe transport. The actual condition of a work could dictate an even longer lead time, if conservation were required.

1.4. NUMBER OF WORKS LENT TO ANY ONE EXHIBITION

The number of works permitted to be lent to a single exhibition is often limited because of the risk of loss or because the lending institution wishes to retain for its own purposes at least a representation of a type or style. However in the case of a lending institution possessing an archive or multiple impressions of a single image, there might be more flexibility when considering the loan of a specific image. Staff time needed to process loans may also be a factor. Typical limits range between six and twelve works, although special circumstances, such as the need for many works from a collection with a special strength that coincides with the focus of an exhibition, may encourage the loan of more.

1.5. EVALUATION OF A LOAN REQUEST

1.5.1. Evaluation of an Exhibition or Other Purpose for Loan

An exhibition is evaluated in terms of its scholarly and educational significance and its likely contribution to aesthetic, cultural, historical, or scientific study. Most institutions are more willing to lend if a well-illustrated, scholarly catalogue will be published. It is the curator’s responsibility to evaluate the seriousness and importance of each exhibition and the role that each object may play in this context. Communication with other curators and experts in the field of the exhibition can be helpful. It is also appropriate to request further information if the original request seems generalized or incomplete.

1.5.2. Evaluation of the Borrowing Institution

The record of the organizing institution in mounting exhibitions and the reputation of the curator(s) and scholar(s) involved should be taken into
account when a loan request is considered, as should any history of losses or difficulties in dealing with the borrower in connection with previous loans. Any problems or complications with a borrowing institution and its staff should be recorded as part of the loan documentation when an object is lent.

2
EVALUATION OF THE EXHIBITION SITE

2.1. FACILITIES

Evaluation of conditions of security, safety, and environment at the exhibition site is customarily based upon the institution’s report. The Standard Facility Report of the American Association of Museums or similarly complete information forms are acceptable for this purpose. At the least, a facilities report should describe security, climate control, lighting, and safeguards against fire. Specific recommendations are dealt with below.

2.1.1. Handling

The borrowing institution should allow only trained curatorial, conservation, or registration staff and experienced packers and preparators/collections care specialists to handle works of art. The lending institution should impose special handling restrictions when necessary and should have confidence that these will be respected. Such restrictions might include stipulating that a lender’s own staff member in the role of courier, unpack and repack the object at the exhibition site, and supervise installation of the work on exhibition. When the work is not on exhibition, it should be handled and stored with every appropriate attention to its safety and security.

2.1.2. Security

Guards must be in attendance, with no other duties, when exhibition galleries are open. When closed, galleries must be protected at all times by comprehensive electronic security systems and/or human guards. Small to medium size framed objects should be screwed to the display wall or panel with metal plates. If more traditional hanging devices must
be used, a security tether behind the frame or a metal plate at the bottom of the frame can be added. For additional security, many institutions use screws with “high security” configurations that require special tools for removal. Screw heads should be painted over or covered so that any attempt at tampering is easily visible.

Works of exceptionally small size or high value should be protected with electronic alarm systems or should be installed in cases. Cases should be constructed according to the lender’s standards, properly weighted or otherwise fixed to the floor or wall and locked or otherwise secured by high-security screws, moldings, or other fixtures that conceal fastening devices. They may also be alarmed. Works on paper are almost always protected by acrylic glazing or glass, but occasionally some works may be exhibited unglazed. These should be protected from physical contact or movement through air currents generated by visitors or vents. Stanchions, platforms, electronic devices, cautionary labeling and increased presence of gallery guards are suggested.

2.1.3. Sprinkler Systems

Because of the susceptibility of works on paper to water damage, the presence of sprinklers in exhibition and/or storage areas has been a special concern. In the present opinion of museum security specialists, however, sprinklers provide an excellent first defense against fire and can be engineered to prevent unwarranted discharge. Further, water damage associated with extinguishing fires in museums has historically been far more serious than damage from sprinkler discharge. Any system should conform to National Fire Protection Association standards and should be regularly maintained. Preliminary consideration of a loan to an institution might include a request for detailed information on the specific system, which can be reviewed by the lending institution. To minimize potential damage to loans, works can be framed in special water-resistant packing (see Appendix). The borrowing institution may be asked to pay costs associated with this special preparation.

2.2. TEMPERATURE AND HUMIDITY

Since temperature and relative humidity strongly affect hygroscopic, organic materials such as paper, as well as layers of pigment and coatings, it is essential that these two environmental conditions be maintained within a given
range and with as little fluctuation as possible. Hence, no object should be hung over a heating or air-conditioning unit or otherwise subjected to rapidly changing conditions, such as might be found in a foyer.

Fluctuations in temperature and humidity are particularly problematic for some works, for example those on vellum or ivory supports. Specially designed housings and microclimates may be required to maintain specific conditions for sensitive works.

Prior to approval of a loan, climate records can be requested from the borrowing institution in order to determine whether temperature and humidity ranges at that institution during the season of the proposed exhibition meet with the needs of the object(s) to be lent. The lending institution may stipulate that climate records be sent periodically during the term of a loan to ensure that these ranges are consistent.

Note that in historic structures, temperature and humidity requirements may be incompatible with the ability or desirability of installing and maintaining climate-control systems. Loans to such sites must be evaluated taking into account the climate of the particular season of the loan and existing records.

The following guidelines are recommended:

2.2.1. Temperature in exhibition and storage areas

   Temperature should be controlled within the range of 65°-72°F with a fluctuation of no more than +/-5° within a 24-hour period.

2.2.2. Relative humidity (RH) for most objects in exhibition and storage areas

   RH should be controlled within the range of 40-55% with a fluctuation of no more than +/-5% within a 24-hour period. The narrowness of range is less important than avoiding rapid fluctuations, but relative humidity should not exceed 65% since the danger of mold growth is great above that level.

   Note: Although most institutions currently follow the above guidelines, they are being re-evaluated in order to establish a broader international standard geared toward energy efficiency and sustainability.
2.3. POLLUTION

Referring to the larger environment for a work on exhibition, information regarding the filtration of particulate and gaseous pollution from indoor air should be provided by the borrowing institution. Referring to a more local environment, enclosure of an object in a case creates a microclimate that must be carefully controlled and monitored, especially with regard to temperature, humidity, and pollutant levels. The materials used in fabricating a case environment should be inert and non-contaminating to the objects within. Certain wood and particle-board products, oil-based paints, and other conventional building materials are often unsuitable; and fabrics of presumably inert fiber content may have deleterious finishes. The Scientific Program of the Getty Conservation Institute has done significant testing in this area and may be consulted for specific queries. Lending institutions can specify materials and/or require that case and other materials be tested in advance of construction for suitability.

A picture frame also creates a microclimate, but the responsibility for its quality conventionally rests with the lending institution, which frames the work prior to loan.

2.4. LIGHT EXPOSURE

All works on paper are susceptible to cumulative and irreversible damage from exposure to light. Electromagnetic radiation (light) exists as ultraviolet (wavelengths below 400 nanometers), infrared (wavelengths above 700 nanometers), or the visible spectrum (wavelengths between 400-700 nanometers), with the ultraviolet component being potentially the most dangerous. However, exposure to visible light, that is, the illumination of the work while on exhibition, both in terms of intensity and duration is of concern. Infrared and ultraviolet radiation can be virtually eliminated from exhibition sites, but exhibition presupposes illumination by visible light. It is the practice of many institutions to exclude all natural light, filtered or unfiltered, from exhibition areas because of the difficulty in controlling the intensity of natural light illumination.
2.4.1. Ultraviolet Radiation

As ultraviolet radiation contributes nothing to the visual perception of the object, all light sources in exhibition and/or storage areas that may emit ultraviolet radiation, including natural light, fluorescent light, quartz halogen light, and LED, should be fitted as appropriate with filtration that eliminates wavelengths below 400 nanometers. Sensitive works should be glazed with materials like Plexiglas OP-3®, Optium® or Museum Glass®.

Conventionally, many lending institutions require all works to be framed with ultraviolet inhibiting glazing even if the borrowing institution has ultraviolet filtration on all light sources in the exhibition area.

2.4.2. Infrared Radiation

Infrared radiation (which generates heat) can also be damaging, especially when objects are illuminated with strong incandescent light or installed in cases with built-in fixtures. Cases with internal illumination that generates heat should be avoided.

2.4.3. Visible Light

Radiation in the visible spectrum, that is, ordinary illumination, is harmful to all works on paper. Both the intensity of light and the duration of exposure must be taken into consideration, because long periods of light exposure at low levels are as damaging as brief periods of intense illumination. It is essential to bear in mind that light damage is cumulative and that each period of exposure, no matter how well controlled, affects the long-term well-being of any work on paper. Exposure times should be limited in order to protect works as long as possible from the effects of visible light. It is therefore recommended that strict exhibition policies be adopted for all works on paper to limit the number of times a work is exhibited over the long term, both at its home institution and elsewhere.

For especially light-sensitive works, frequently exhibited works, and/or works that are visibly light damaged, it is important that the responsible curator be very strict not only in evaluating loans but also in exhibiting the work at the home institution.

To help in setting light exposure guidelines for loans and the exhibition of works on paper, useful studies and standards of practice have been
published under the aegis of the American Institute for Conservation, the Getty Conservation Institute, the Canadian Conservation Institute, and the International Institute for Conservation, among others. Please note that standards are constantly evolving according to current research. See the attached bibliography for specific references.

Note: Establishing a system of rationing of light exposure for works on paper, with intervals of darkness, should never be construed as supporting the fallacious belief that a “rest” between exposures in some way ameliorates the damaging effects of light.

2.4.4. LED Lights

Catching on quickly for use in museums, Light Emitting Diodes or LEDs are an emerging, energy efficient lighting option. The Getty Conservation Institute and the Smithsonian have conducted tests on LED lighting, including potential damage to sensitive works on paper. Although the technology is constantly developing, LED lights are currently considered an acceptable lighting method. LEDs are energy efficient, partly, because they emit far less heat than other light sources like halogen and tungsten. LEDs also tend to emit little to no ultra-violet radiation so long as they fall within a certain range of Kelvin, or color temperature. 2700 to 3000 Kelvin give a good range of warm to cool colored lighting options and emit little to no UV radiation. Higher color temperatures should be avoided for light sensitive materials as these LEDs may emit high levels of UV.

2.4.5. Duration of Exposure

Although individual works on paper can be more or less susceptible to damage from light, it is useful to have a general rule of thumb setting a maximum limit to the exhibition life span of every work on paper. In one scheme, this exhibition life span could be expressed as a certain number of exhibition times—fifteen, for example—none of which could exceed six months in duration, or as a certain number of months or years of total exhibition time. Fifteen exhibition periods of six months each would equal seven-and-a-half years, or ninety months, of total exhibition time, which is a generous allowance for any work on paper. Another system would not express a total life span but rather provide a ration within an extended time period: for example, it could limit a work to a maximum of ten months’ exhibition within any ten years. Any such system must factor in the intensity of light exposure (see below) as well as its duration.
These numbers should serve only as suggestions, however, since each decision to exhibit a work must be based on the curator’s/conservator’s assessment of the current condition of the work, its exhibition history, and the impact of a given period of light exposure on its long-term preservation. It may be possible to allow works that are composed of particularly stable materials and show no light damage to be exhibited more than the prescribed number of times.

Duration of light exposure per loan should ideally be restricted to no longer than nine months* exhibition time in the case of more stable materials and shorter periods for less stable. These limits should apply to the total duration of an exhibition, including all venues and preparation time, but should not apply to periods between installations when there is no light exposure.

* At this writing, many loan exhibitions have 3-4 venues of 3-4 months each.

2.4.6. Intensity of Exposure

Works on paper should always be exhibited under controlled light levels. (Here, measurement is expressed in the U.S. in foot-candles; for a rough estimate of the metric equivalent, called lux, multiply by 10).

For relatively light-stable works (i.e., old-master black ink on paper prints; old-master drawings in black, white, or sanguine chalks on paper; India ink drawings on good quality paper; archivally processed twentieth-century black-and-white photographs), the maximum should not exceed 10 foot-candles/100 lux.

For works in media and on supports that are more sensitive to damage by light (i.e., colored ink drawings, drawings and prints on colored or acidic papers/boards, watercolors, pastels, color photographs, nineteenth-century photographs on paper, Japanese prints, certain digital processes, any work with pigments that are not known to be light-fast, any work that is frequently exhibited), the light level should not exceed 5 foot-candles/50 lux.

Note: A conservator’s advice can help determine appropriate light levels and length of exposure for particular papers and media. Light levels should be checked by the courier, registrar, or collections care specialist using a light meter as part of the installation process.
2.4.7. *Mitigation of Exposure.*

Lights should be turned off when the exhibition area is closed. Motion detectors can be coupled with switches to turn off lights when the display area is unoccupied or cloths or other opaque barriers can be installed over works, to be drawn aside by the interested viewer. Exposure should be minimized in receiving and storage areas and during exhibition preparation, either by radically reducing the illumination, covering the objects, turning them to the wall.

2.4.8. *Recording Exposure.*

Accurate records of exhibition periods at specified light levels should be kept for a work from the time of its acquisition, and to the extent possible, previous records of exposure should be documented through research if not provided at the time of acquisition. When the work is requested for exhibition, either at the home institution or on loan, the record can be checked to give the responsible curators and conservators an indication as to the historic (and thus potential) demand for the object, the amount of accumulated exposure time that it has already suffered, and how close to the guideline exposure limits it may be. If a work has been exhibited many times, is likely to continue to be requested for exhibition relatively often, both the work and the rationale for including it in the proposed exhibition should be carefully reviewed. Many museums now employ databases such as The Museum System® (TMS®) which assist in managing records and keeping them up-to-date.

3

**MATERIAL CONSIDERATIONS REGARDING THE OBJECT REQUESTED**

The physical susceptibility to damage of each object requested for loan should be individually assessed. The advice of a conservator should be sought for all requested loans, especially if the stability of the object is questionable. The following should be lent with the utmost caution:
3.1 FRAGILE OBJECTS: MEDIA, SUPPORT, CONDITION, INHERENT SUSCEPTIBILITY

*Media:* Unfixed pastels or charcoal drawings; flaking or friable watercolors or gouaches; collaged elements: All of these are materials are inherently fragile and susceptible to damage from the increase in vibration, environmental fluctuation, and handling associated with shipping and installation. In the case of pastels or other works with fragile/friable media, it is advisable to handle them face-up and install them last using hand rather than power tools to secure them.

*Support:* Vellum, ivory or other potentially reactive supports; unusually thin or thick papers; paper supports on strainers; hanging scrolls; screens; albums or some bound books: These are fragile because their materials or construction can make them particularly susceptible to damage from vibration, environmental fluctuation, and handling associated with shipping and installation.

*Condition:* Objects that are fragile because of previous repairs or past damage.

*Inherent Susceptibility:* Watercolors and gouaches; some pastels, felt-tip or ball point pen inks; some commercial printing inks used for digital and ink-jet printing; vegetable and synthetic dyes; wood pulp or colored papers/boards; plastics; some photographs. These are comprised of materials that can be inherently unstable to light, humidity and temperature.

3.2. OBJECTS UNFIT FOR SHIPMENT

Works of great size or weight which might impose safety and handling issues in addition to prohibitive costs associated with loan and installation.

3.3. SPECIAL CIRCUMSTANCES

Curators may judge some institutions, by virtue of facilities, training and experience, better qualified to borrow fragile objects than others and may, with
special arrangements, permit the loan of fragile objects. Such arrangements might include hand-carrying, installation by a staff member of the lending institution who is familiar with the object’s special conditions, and/or the construction of customized packing and installation in microenvironments. In the case of bound material in good condition, restrictions on opening and/or custom-made mounts are usual. The borrowing institution should be advised of any special requirements and their costs and should agree to them in advance. The borrowing institution is expected to cover costs arising from these arrangements.

4
MATTING, FRAMING, AND GLAZING

4.1. MATTING
The object should be matted or otherwise housed so that when framed and glazed, the surface of the object is not in contact with the glazing material. The object should be attached to its backing securely so that if the package or crate is shifted in orientation during shipping or exposed to substantial shocks, the object will not loosen. Special configurations that may be adopted for loan include over-matting all edges of the object or attaching the object to its backing at all edges with hinges or corner mounts.

4.2. FRAMING

4.2.1. General Conditions.

Objects that are flat, individual sheets of paper should be lent framed or in a protective package (see Appendix). If the object is ordinarily framed in a fragile, ornate, or valuable frame, it might be reframed in a sturdier traveling frame unless the borrower accommodates the permanent frame under the same conditions that it would accept in borrowing any other comparably delicate art object.

Frames for traveling should be of simple, sturdy construction. In wooden frames, splined corners are preferred to nailed corners. In both wooden and metal frames, moldings and backing should permit installation with
metal plates, which can be attached to or sent with the frames. Bottom edges and/or special hanging devices might be required to provide additional support to particularly heavy pictures.

4.2.2. Glazing.

Frames should be glazed with a shatterproof material, preferably an acrylic sheet that will also give protection from ultraviolet radiation. If an object with a powdery or friable surface (which is susceptible to damage from static generated by acrylic sheet glazing) is approved for loan, it should be shipped glazed with an antistatic glazing such as Truvue Optimum® acrylic or Museum Glass® incorporating (through matting or spacers) a generous distance between the art work and glazing. Rarely, it might be necessary to send a work that is framed glazed with glass (i.e.: historic frames); a conservator’s advice should be sought in this circumstance. The type of glazing used should be noted on the frame’s reverse and in accompanying documentation. Instructions regarding cleaning glazing should be provided (in courier packet or with condition reports). Supplies used for installation or minor repair often travel with the courier; or are packed in a separate crate that is included as part of the shipment.

4.2.3. Sealing.

The frame should be sealed (usually with tape) to retard the effect of environmental fluctuations; to keep out dirt, dust, and insects; and as a means of assuring the lending institution that the object has not been removed from the frame during the loan. A single tamper indicating seal may be substituted for all-around sealing on larger frames which contain strainers.

4.2.4. Shipping Objects Unframed.

If for reasons of economy, logistics, or safety, the lender considers it advisable to ship objects unframed (either accompanied by frames and/or glazing or with the requirement that the borrower provide suitable frames and/or glazing, or installation in a case), the lender must be assured of the qualifications of personnel at the borrowing institution who will prepare the objects for exhibition. Further, the lender may require that its own personnel travel to the loan site and perform these tasks before and after the exhibition. If a work is to be exhibited unframed, the lending institution should provide instructions for
handling and installation, or it may require that a member of its own staff accompany the work and install and de-install it.

4.2.5. Unframing Restrictions to Borrowers.

Generally speaking, the borrower should not remove an object from its frame or housing. Exceptions include the necessity for repairing an object that has been damaged or whose mounting has failed. Also, a borrower may make a special request to unframe a work for examination of a watermark or other technical feature that would be unintelligible in the frame. The lender should be fully informed beforehand about the need, circumstances, and personnel involved in unframing, examination, repair, and reframing. No object should be unframed without the explicit written permission of the lender, and the borrower must accept whatever conditions the lender might require.

4.2.6. Special Framing Requests by Borrowers.

If a particular style or type of mat and/or frame is wanted for an exhibition, the borrower should supply these, of the proper size, to the lender. Alternatively, the lender might send the object unframed but sealed under acrylic sheeting with a sturdy backboard (see Appendix), so that the picture package could be installed without further modification in the borrower’s frame. If the lender supplies a special frame or new glazing for the purpose of the exhibition, the framing cost, as well as any cost incurred by special matting, should be paid by the borrower.

5

INSURANCE

5.1. VALUATION

Every object that goes out on loan needs to be valued for insurance purposes and the value should be clearly stated on the Loan Agreement. Such a value is normally set by the responsible curator, who bases it as much as possible on current market value for comparable works by the same artist or by artists of the same school. Auction sale records are useful for establishing values as are
dealers’ catalogues, although price lists are not always included. It can also be useful to consult with professional appraisers or dealers who specialize in the kind of object being loaned or, in the case of contemporary works, with dealers who represent the artist whose work is being valued. The website of the Getty Research Institute offers an appraisals research guide with links to online resources for determining the value of works of art: http://www.getty.edu/research/tools/guides_bibliographies/guide_appraisal.html

It should be borne in mind that the value for insurance purposes should be geared to replacement cost at the time of the exhibition, should the work be lost or damaged, rather than to its current fair market value. Furthermore, if a value is set well before the actual loan takes place, the Loan Agreement may specify that the lender reserves the right to revise the value closer to the actual period of exhibition in order to reflect fluctuations in art prices.

5.2. INDEMNITY

For loans to exhibitions in domestic and foreign museums, the lender may apply for government-guaranteed indemnity in lieu of commercial insurance. Such government indemnities can save exhibition organizers a significant amount of money, since there are no premiums to be paid. Indemnities are usually considered to be as safe and comprehensive as standard museum policies. The terms of each indemnity should be reviewed and compared to the terms of the lender’s own insurance policy. Special attention should be paid to deductibles, the duration of coverage (from the moment it leaves the museum to the moment it is returned), and procedures for resolving claims. If the terms seem problematic or too vague, clarification can be requested from the borrowing institution, and refinements or revisions can be proposed that will make the indemnity acceptable to the lending institution. Otherwise, the lender can insist that the borrower cover the loan under its policy, purchase commercial insurance to its objects or the lender can maintain the loaned objects on its own blanket policy and bill the premium to the borrowing institution. Lenders may require the borrower to provide a Certificate of Insurance (COI) for the loan. The COI will state the period and terms of coverage, which typically include transits, or what is referred to as wall-to-wall coverage.
6 CONDITIONING AND DAMAGE

6.1. CONDITION REPORTS

A report on the condition of each object should be made by a paper conservator, collections care specialist, curator, or registrar before the object leaves the lending institution. Normally a standard form, one per object, is filled out; however, it may be advisable to tailor forms for particular objects or for a specific transit. If possible, each form should be accompanied by an image of the object on which condition problems can be identified. The report should travel with the object (with the lending institution retaining a copy for reference). Reports can accompany the loan in a binder or other suitable format. Objects should be checked against the reports by the courier, registrar, or another qualified person upon arrival and departure from the borrowing institution, and any change in condition noted. The same procedure should be followed each time that the work travels, from one venue to another and from the last venue back to the lending institution.

6.2. DAMAGE

In the event that an object is damaged during transit or while on loan to another institution, if it is in no immediate danger of suffering further damage, the borrowing institution should wait for instructions from the lender before taking action of any kind, even including moving the object or removing it from its frame. Otherwise, only the minimum action necessary to stabilize the object and to prevent further damage should be taken.

If damage to an object is discovered upon its return, the owner should contact the exhibition organizers immediately to notify them that damage has occurred and that an insurance claim may be filed. The damage should be documented both in writing and photographs. If an insurance claim is filed, no conservation action beyond stabilization should be taken until agreement has been reached about insurance reimbursement.
6.2.1. Reporting to the Lender.

The incident and the nature of the damage should be reported immediately by the borrowing institution to the lender. It is best to do this as quickly as possible so that the lender can learn as accurately as possible the type and extent of damage and can make an informed decision about the appropriate next action. The borrower should follow up the oral report with a complete written report that can be sent to the lender. Likewise, the lender should follow up in writing any oral instructions or permissions given to the borrower. Photographs should be taken to document all damage and remedial action.

6.2.2. Repair.

With the permission of the lender, certain types of minor damage, such as chipping of the frame, slipped hinges, scratched glazing, or cracked glass, may be treated by the borrowing institution, especially if there is a conservator on the staff. In the case of more substantial damage, the lender may want to send a conservator to the borrowing institution to assess the situation and take necessary action.

If the damaged work was accompanied to the borrowing institution by a courier, the courier should remain on site for as long as it takes to resolve the situation. The presence of a knowledgeable and sensible courier from one’s own staff can help considerably in assessing the situation, deciding what actions should be taken and overseeing and directing the responses of the borrowing institution.

The borrowing institution or its insurer should bear the cost of a conservator’s travel, lodging, and per diem for as long as it takes to remedy the situation and/or the additional costs incurred by a courier’s extended stay.

6.2.3. Reporting to the Insurer.

Minor damage that can be quickly remedied without harm to the object might not need to be reported to the insurer. Major damage, however, that affects the value of the object and may require significant conservation and repair must be reported. In the case of a total loss, the insurer reimburses the owner for the full insurance value set prior to
loan. In the case of partial loss, the owner and the insurer must reach an agreement about the extent of damage, the resulting loss of value (usually expressed as a percentage of the insurance value), and the cost of restoring an object as much as possible to its former appearance.

7

SHIPPING

7.1 PACKING AND CRATING

Although framing and glazing afford an object a first layer of packing, additional packing for travel must be adequate to protect against any contingency. In crate design, particular care should be taken to buffer against environmental fluctuations, vibrations, shock, water damage, and contaminating pollutants. Small to medium works on paper can be packed oriented lying flat, face-up (always a good idea in the case of fragile media). Groups of similar sized small to medium works may be packed oriented vertically as they would hang and facing in the same direction within a top-loaded slotted crate (or a side-loaded slotted crate). Large/oversized works framed with acrylic are generally packed vertically to prevent the heavy acrylic from bowing onto the artwork. It is recommended that works on paper be wrapped in high density polyethylene and sealed with tape before packing into the crate. Other materials such as corrosion intercept may be required to wrap certain types of photographs. Crates should be designed to foil reorientation and labeled to indicate correct orientation for packing, travel and unpacking. Hand tools rather than power drills are preferred for use on crates containing works with fragile/friable media.

7.2 TRANSPORTATION

A means of transport appropriate to the object should be selected, especially if the object is particularly susceptible to vibration or environmental fluctuations. Most lending institutions will require a fine arts shipper and customs broker, if required. At most institutions, it is the registrar who coordinates these aspects of a loan. In the case of shipment by truck, dual driver, climate-controlled, “air-ride” vehicles should be required. Air shipment is often done in the cargo hold
on commercial or cargo flights accompanied by couriers from the lending institution. If possible, a 24-hour period of acclimatization at the borrowing institution before uncrating or unpacking is recommended.

7.3 COURIER OR ACCOMPANIER REQUIREMENT

A courier or accompanier is often required especially if the object is rare, valuable, or fragile; if the transit involves more than one carrier (a change of planes, or plane and truck); and/or if the object must be unpacked and/or installed with particular attention.

7.3.1. Courier.

The term “courier” is understood to mean a staff member of the lending institution who oversees the transport of a loan from door to door. A courier may be a curator, conservator, registrar, preparator/collections care specialist, or other trained art handler. Selection of a courier strictly according to position within the institution, however, is not recommended. A courier should be able to fill out a condition report, pack and unpack, document any damage and make recommendations for treatment, and photograph. In selecting a courier, thought should be given to likely problems and needs. A level-headed, diplomatic person, able to deal with unexpected circumstances, is ideal. For international loans, it is helpful if the person knows the appropriate language(s); the courier should also understand the relevant shipping procedures and know the limits of his/her authority. A courier, who is accompanying cargo, normally travels in business class on a passenger airplane, or on a cargo plane, depending upon the destination or the size of the crate(s).

7.3.2. Hand-Carrying.

Hand-carrying may be required if an object (or objects) is of manageable size and is particularly valuable, fragile, must be handled especially carefully, and/or must not be subjected to the extremes of temperature and relative humidity of a cargo hold. The courier and object usually travel by plane in business or first class; an extra seat may be required to accommodate the object in appropriate packing. If not secured in an extra seat, the object package should be secured in a safe place within sight of the courier. It is not advisable for a courier who is hand-carrying
an object also to be responsible for a crate that is being shipped in the cargo hold of the same transit. Hand-carrying should be employed rarely and for exceptional cases.

7.3.3. *Accompanier.*

The term “accompanier” is understood to mean a courier who oversees transport of a loan from a different institution at the same time as one from his/her own. The accompanier and the institution must meet the lending institution’s standards; the lending institution may reserve the right to approve the choice of accompanier for its works.

8

MISCELLANEOUS

8.1 COSTS AND FEES

The lending institution normally passes on to the borrower recoverable costs for matting, framing, packing, shipping, and insurance. Some institutions, either instead of or in addition to these charges, assess a flat fee per object lent or per loan, to defray administration and handling charges. Any extra costs, as for extraordinary conservation, framing, or couriers, are also normally charged to the borrower. All costs associated with a loan should be agreed upon prior to the signing of the loan agreement.

8.2 PHOTOGRAPHY RESTRICTIONS

Photography of objects on loan to exhibitions will depend upon copyright restrictions and rights agreement with artists. Normally, however, photography of works of art for condition reports, publicity purposes, and records of installations are acceptable as part of a loan agreement. Limitations on light exposure should be imposed and monitored, so that no photographer’s lights will be left on except for the purposes of exposure readings and the photography itself. If a work is too light-sensitive to permit light-assisted photography or cinematography, the lender should so specify as part of the loan agreement.
8.3 REPRODUCTION RIGHTS

A borrowing institution should always obtain all appropriate rights and pay whatever fees (usually waived for scholarly publications) charged for reproducing exhibited works in all publications accompanying the exhibition (catalogue, brochure, leaflet, etc.), for individual reproductions that will be sold in conjunction with the exhibition (postcards, posters, etc.), and for publicity materials that will be used to advertise or promote the exhibition. Requests for such rights are often included as part of the loan contracts drawn up by the borrowing institution and should be reviewed carefully by the lender. Contracts can be amended or revised before signature to conform with the lender’s reproduction policies. When dealing with contemporary art, the borrower may have to be referred to the artists, their agents, their heirs, or the trustees of their estates to obtain reproduction rights for works requested for exhibition.

In return for reproduction rights (and sometimes in lieu of normal fees), lenders often require that one or more copies of the exhibition catalogue be sent by the borrower for inclusion in the lender’s library and/or study room reference collection.

8.4 INTERNATIONAL LOANS

In general, the above guidelines apply to both domestic and international loans. The requirements of international loans, especially with regard to protective framing and the use of couriers may be more stringent than domestic loans; a courier may be stipulated for all international loans. For some institutions, decisions about international loans are made only by the board of trustees or director. Many American and Canadian institutions either insure objects themselves or require a domestic insurer; lenders should fully satisfy themselves of insurance conditions prior to agreeing to an international loan and should take extra care to approve all arrangements for transport, including the choice of the art carrier and customs broker. There are several companies that offer these services; a registrar will be able to coordinate this aspect of the loan.
BIBLIOGRAPHY

Many of the publications listed below have excellent extended bibliographies, which provide much useful material in addition to those listed here.

9.1 GENERAL GUIDES


Museum Security Network. MSN is devoted to the safety and security of cultural property. Their services include an extensively linked Web site. Contents include access to articles, lists of consultants, security organizations, disaster management resources, and contact information for reporting loss. [http://www.museum-security.org](http://www.museum-security.org)


9.2 SPRINKLER SYSTEMS


9.3 LIGHT EXPOSURE STANDARDS

For extensive research into LEDs:


9.4 EXHIBITION FURNISHINGS

9.5 PACKING AND CRATING


9.6 COURIERING AND ACCOMPANYING


10 OTHER RESOURCES

American Alliance of Museums (formerly American Association of Museums)
1575 Eye Street NW, Suite 400, Washington DC 20005
202.289.1818
http://www.aam-us.org/

American Institute for Conservation (AIC)
1156 15th Street NW, Ste. 320
Washington, DC 20005
202.452.9545
202.452.9328 fax
http://www.conservation-us.org/
Association of Registrars and Collections Specialists  
5651 Lydell Avenue, #170763
Milwaukee, WI 53217  
414.418.0516
email arcs4all@gmail.com

Canadian Conservation Institute  
1030 Innes Road  
Ottawa, Ontario K1A 0C8, Canada

Smithsonian Institution  
Museum Conservation Institute
Museum Support Center  
4210 Silver Hill Road  
Suitland, MD 20746
http://www.si.edu/mci/index.html

Getty Conservation Institute (GCI)  
1200 Getty Center Drive, Suite 700  
Los Angeles, CA 90049
http://www.getty.edu/conservation/

International Institute for Conservation of Historic and Artistic Works  
3 Birdcage Walk  
Westminster, London, SW1H9JJ, United Kingdom
https://www.iiconservation.org/
For Bizot group guidelines: https://www.iiconservation.org/node/5168
This diagram shows a cross-section of a basic method to seal a matted work on paper within a glazing and backing sandwich, so that the work is protected from water damage. This system can also be used without the impermeable film, to provide a self-contained package safe for shipment and handling unframed, where water damage is not a factor. Note that the tape used to seal the package is “counter-taped,” that is, a strip of thinner tape is run down the center axis of the wider strip, adhesive to adhesive, so that the adhesive layer that adheres to the glazing material and the backing does not stick to the edges of the mat.
LEGAL NOTICE

The attached Guidelines for Lending Works of Art on Paper (the “Guidelines”) was prepared by a committee of museum professionals who are members of the Print Council of America (“PCA”). Its intended purpose is to provide guidelines outlining “best practices” for exhibiting and lending works of art on paper. The Guidelines are being made available to colleagues in museums, libraries and private collections for general information purposes only and should not be relied upon in any manner or be used in substitution for the exercise of independent judgment. Each person accessing or having reference to the Guidelines, or any information set forth therein, is and shall be responsible for conducting his or her own independent assessment and analysis of the Guidelines, both generally and in the context of his or her own circumstances, and PCA makes no representation or warranty (express or implied) that the Guidelines are applicable or appropriate to a particular colleague’s circumstances, purposes or use.

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