

# Loans Procedure

## Introduction

The Oakham School Archives, hereafter the Archives, is in The Barber Rooms, College House. It derives its authority to collect, preserve and make available archives from this policy statement, adopted formally by the Trustees of Oakham School. The Archives were officially set up in 2010. Beforehand, there was no official service, and archiving and staff volunteers undertook collecting on an ad hoc basis. An official archive was set up to ensure proper security of the material as well as enabling collecting of material from Old Oakhamians and other sources. Peter Lawson, OO and Chairman of Trustees, provided considerable support.

Previous volunteers were made up of ex members of staff and Old Oakhamians including Brian Needham, Roger Blackmore, Nigel Webb, Kate Williamson, Roger Anderson, and Michael Allbrook.

The Archives currently holds a wide variety of materials relating to the history of Oakham School dating from the 16<sup>th</sup> Century.

## Aim of the policy

The aim of this policy is to outline the loans in and out procedures at Oakham School Archives. This is to ensure the safety of our collection, clearly lay out the steps and expectations of the loans process, and clarify legal requirements.

The Archives welcome requests to loan its material from both within and external to the School's community. We are keen to be involved with external loans to:

- Increase the awareness of Oakham School Archives and its collections.
- Widen access to the School's collection.
- Support the research of pupils, staff, and external readers.
- Support teaching and learning for all ages.

This policy only covers loans and not permanent depositions or deaccessions from the collection. These are covered in separate policies.

## Notes

There is not a single, unifying loans procedure in the museum and archives sector. As such, for more detailed conditions regarding loans in and out of Oakham School Archives, please see the separate Loans In and Loans Out Agreements.

## Loans Out

### Applying

#### Initial Contact

Until the Archives' new catalogue is available for public viewing, all enquiries regarding items in our collection should be made directly to the archives via email ([archivesuser@oakham.rutland.sch.uk](mailto:archivesuser@oakham.rutland.sch.uk)) or via telephone: 01752 758608. The Archives team will be happy to discuss the collection and make recommendations.

#### Formal Requests

Any formal request for materials to be loaned should be made in writing six months before the date of the proposed loan. This is to allow for preparation of the item(s), agreement of clauses within the loans contract, shipment of the item(s), and adequate preparation of storage and exhibition space for the item's(s') conservation needs. Requests made at a shorter notice will be considered and the Archives will endeavour to accommodate. We will acknowledge your request for a loan within two weeks of receipt of the initial email (term time).

Requests for borrowing material on loan should include the following:

- Items desired for loan.
- Name and contact details of the borrower/ borrowing institution.
- Purpose for loan.
  - Exhibition dates and synopsis of exhibition (if applicable).
- Length of loan period desired.
- Type of loan desired e.g. temporary, long term, touring.
- Who will be responsible for the items when in the borrower's care?

Items can be requested for both educational and exhibition purposes. The Archives will endeavour to fulfil each request fully however the Archives reserve the right to refuse the loan of any material deemed unsuitable.

#### Duration

The duration of any loan will be determined upon the needs of the borrower. The maximum term that a borrower can loan material is one year.

Should an extension be needed for the loan period, this should be negotiated with the Archivist at least 25% in advance of the termination date (e.g. If the loan period was 4 months, at least 1 months' notice will need to be given).

The Archives reserve the rights to terminate a loan at any point. These reasons are outlined in the Termination section of this document.

## Who can borrow?

The Archives intends to make its collection accessible to as many people as possible and intends to lend material to other schools, archives, museums, or heritage venues to achieve this. We will not lend to private individuals. This is to ensure the safety and preservation of our collections.

## Decisions

Once a request has been formally submitted to the Archives, a decision will be made by the Archives team regarding the request.

The Archives will consider the following when making their decision:

- The preservation needs and condition of the item(s).
- Resources available to carry out the loan (e.g. time and staff).
- The potential costs of the loan.
- If the absence of the item will be detrimental to the Archives learning and outreach programmes.
- Availability of the item(s).
- The condition of the item(s) and its suitability for travel and exhibition.
- Security and insurance concerns.

All requests will be considered carefully, and decisions will be communicated as quickly as possible.

If successful, a Loans Out Agreement form will be drawn up and sent out. This agreement will contain specific clauses for each loan and both the borrower and the Archives will need to reach an agreement. Each party will be issued a copy of the final Loans Out Agreement.

The Archives reserve the right to ask for more information from the borrower at any time.

## Refusal

On some occasions requests for a loan may be refused. This could be for a range of reasons including:

- Insufficient time to prepare the loan.
- Item(s) requested are unsuitable for loan due to preservation, GDPR, copyright or other legal reasons.
- The borrower cannot guarantee the safety and security for the item(s) whilst in their care. This can include environmental controls.
- If a loan has already been agreed with another institution.
- The item(s) may be required for the Archives' programme of learning and outreach.

- The topic of the exhibition or context for which the item is being borrowed is unethical or opposes the values and beliefs of Oakham School.

Any refusal will be accompanied with a full explanation and we will try to work out a plan forward to allow a loan to go ahead (for example the production of facsimiles).

### **Insurance**

Should it be deemed necessary due to the importance and/or value of the item(s) loaned, the Archives reserve the right to ask the borrower to take out insurance for its safety.

The necessity of insurance will be discussed with the School's bursary when drawing up the Loans Out Agreement.

All expense for insurance will need to be met by the borrower.

### **Transport and Packing**

Only items which are suitable for travel will be agreed for a loan.

The item(s) will be packed by the Archives' team. Items may be packed 'exhibition ready' This term means that an item may be ready mounted or boarded for display. This will be discussed with the borrower prior to packing. A condition report will accompany the item(s) detailing its condition when leaving the Archives. The Archivist will check the item's(s') packaging and once confirmed, the item(s) will be sent to the borrower.

Items will be sent recorded with a courier. Transport for the item will be as close to the start date of the loan as possible. The borrower will be informed of the transport details and dates.

When items are being returned, the borrower must repack item(s) in the same way that they were received, using the original packing and boxes. The borrower will fill in the returns section of the item(s) condition report and send this back alongside the relevant item(s).

Borrowers should make accommodation within their loan duration request for transportation of items. The item(s) on loan will have to be received back at Oakham School Archives on the end date of the loan period.

The borrower will bear the cost of all mounting, packing and transport (in both directions).

Transport will be done by the most direct route.

### **Uses and Permissions**

The borrower is not permitted to carry out any physical changes to the item(s) whilst in their care. Any concern for the preservation of the item and/or any recommended conservation work need to be discussed and agreed with the Archivist beforehand.

Items loaned will expressly be for exhibition, display or educational purposes. These purposes may be physical or digital.

Photography, reproduction, and media requirements will be discussed and agreed in the Loans Out Agreement form.

Whenever displayed or used, credit must be given to Oakham School Archives.

### **Damage and Loss**

If the item(s) is damaged or lost whilst on loan, this must be reported immediately to the Archivist.

There will be no smoking, food, drink, or unnecessary touching of the item(s) to minimise damage.

### **Costs and expenses**

There is no charge to loan an item or items from our collection.

All costs for the loan incurred during packing, transportation, security, environmental monitoring, and mounting will be covered by the borrower. This list is not exclusive.

Costs will be provided in an invoice following the sending of the item(s) on loan.

### **Termination**

The end date of a loan period will be agreed in the Loans Out Agreement form.

The Archives reserve the right to recall items from loan at any time. Reasons for termination include:

- Item(s) needed due to existing learning and outreach programme at the Archives.
- Concerns for the wellbeing of the item(s) be it issues with storage, display, or general condition.
- Non-compliance with ethical standards and/or the values and beliefs of Oakham School.

All costs for early termination will be covered by the borrower.

### **Loans In**

Oakham School Archives will undertake every effort to ensure that any inward loans are not suspected or known to be stolen or illegally imported/exported. We will also comply with the Export and Transfer of Ownership of Cultural Property (1970).

We will report any changes to the loaned item(s) immediately to the lender including any damage, lost, risk of damage, and change in the circumstances of the loan. We will not undertake any conservation work on the item(s) in our care unless previously discussed and agreed upon by the lender.

All information will be kept up to date regarding the item(s) data including location, security, and physical appearance. A condition report will be kept whilst the item is in our care.

For more information, please see the Loans In Agreement.