

Conservation Procedure for Loans to External Institutions (including HFJ Museum)

CUL Conservation supports the exhibition program of the Division of Rare and Manuscripts Collections, including loans. This document describes the established workflow and tasks necessary to facilitate the loan of RMC collections to external institutions. See RMC's exhibition and loan documentation for their procedures.

Conservation contact: [Michele Hamill](#), Head Conservator

Person	Department	Role
Michele Hamill (Head Conservator)	Conservation /DCS	Coordinate loan support; review loan request/facilities report; assess paper/photo/artifacts for condition, stabilization/ treatment needs, mount and environment needs; consult with RMC and borrowing institution; conduct stabilization/treatment; pack for transport; review condition upon return
Trina Parks (Conservator for Special Collections)	Conservation /DCS	Review loan request/facilities report for bound materials; assess bound materials for condition, stabilization/treatment needs, mount and environment needs; conduct stabilization/treatment; consultation; pack for transport; review condition upon return
Conservation Lab staff	Conservation /DCS	As assigned: may conduct stabilization/treatment; construct custom enclosures; pack for transport
Rhea Garen (Imaging and Scanning Lab Manager)	DCAPS/DCS	Coordinate loan-related digitization; image rare materials; create electronic files for distribution
Simon Ingall (Visual Resources Collections Coordinator)	DCAPS/DCS	Image rare materials
Kate Carlin (Exhibitions & Public Services Assistant)	RMC	Coordinate loan meetings; coordinate with curators and facilitate communication between borrowing/lending institution; schedule Conservation review; track and route items to Conservation and imaging labs; assist with loan pick-up/return as needed; maintain record of loans
CUL staff /curators	RMC	Communicate with the borrowing institution; ensure all relevant information is provided; verify items requested and conduct a preliminary review of any vulnerabilities or restrictions; forward facilities report to Conservation and request a physical review of materials; if loan request moves forward, ensure loan forms are completed, including any instructions for transport and display and valuations for insurance purposes
Connie Finnerty (Administrative Manager)	RMC	Coordinate with art shipper for pick-up and drop-off at CUL loading dock

CONSERVATION SUPPORT FOR RMC LOANS TO EXTERNAL INSTITUTIONS (10 items or less):**

Loan task	Time estimate
Review borrowing institution's facilities report and loan request; provide feedback and recommendations	1-2 hours
Assessment/consultation/correspondence/review after loan return	5-8 hours
Stabilization/treatment/enclosures	5-25 hours
Condition loan documentation	5-8 hours
Custom mount construction (<i>not usually required</i>)	3-5 hours
Packing for transport	5-8 hours

** Larger numbers of loaned items would require more time and effort in all task categories.

CONSERVATION TIMELINE:

12 months (or more):

- Review Facilities report and loan request sent by curator.
 - Review loan dates (exhibit duration and loan period); environmental conditions; staging and storage; display cases and methods; light levels; disaster preparedness; geographic/climate concerns; security; staff expertise; exhibition/loan experience.
 - Notify curator and Kate Carlin by email of concerns and recommendations concerning the loan request and/or facilities report.
 - Correspond by email with the borrowing institution when needed (copying curator and Kate Carlin) to verify how the borrowing institution intends to display the item(s); relay recommendations and specifications.
 - The safe mounting of loaned items, conforming to CUL standards, is the responsibility of the borrowing institution.
 - As an exception (based on item's condition or a special request of borrowing institution), Conservation may provide a mount, cradle, or mat. Custom matting/framing would be at the expense of borrowing institution, as agreed upon by CUL /RMC and Conservation.

6-8 months before loan is shipped:

- Kate Carlin schedules a Conservation review of requested loan items.
 - Assess condition, stabilization/treatment required, and mount/display needs.
 - Identify items needing stabilization/treatment.
 - Recommend digital files (facsimiles) where appropriate.
 - Identify custom mount needs (e.g., specialty matting and framing) or specialty conservation services (see: *Specialized Services for RMC Exhibitions and Loans*) and communicate to borrowing institution.
 - Recommend light levels, and handling and display requirements.
 - Kate Carlin documents and tracks identified items.

4-6 months (no later than 2 months) before loan is shipped:

- Perform stabilization and/or treatment on identified items in consultation with curator.
- Prepare loan condition and treatment documentation with representative photo-documentation (*for an example, see Vassar loan documentation*).
 - This practice is outlined in [national guidelines](#) and routinely required by borrowing institutions.
 - A physical copy of the condition documentation accompanies the loan items in transit; an electronic version is shared with the borrowing institution if requested.
 - Borrowing institutions check the loan items against the CUL condition loan documentation for changes upon arrival, during exhibition, and at the conclusion of the exhibition.
 - Conservation maintains full treatment documentation in an on-line database and in print.
- Coordinate with Kate Carlin to route treated items to DCAPS for loan photodocumentation, and facsimile file creation and/or printing as needed.
- Secure loan items in labelled protective enclosures (custom card boxes; polyester sleeves with archival support board inserts; folders; custom-fit storage trays) within a fitted archival box. (*see: Vassar loan example below*)
 - Label the outside of the archival box with RMC/Curator contact information and a container list.
 - Include copies of condition loan documentation inside the archival box.



- Rebox the archival box in a custom-fit standard shipping box (contact: CUL Shipping) to ensure 2-layers of protection.

- Label the outside of the shipping box with RMC/Curator contact information and a container list. Tape box shut (as evidence of tampering).
- Return packed items to Kate Carlin/RMC to await art shipper pick-up. Kate Carlin signs Conservation documentation.

Upon return of loan items to RMC:

- Review loan items for any changes occurred from transport, handling, and exhibition.
 - Borrowing institutions check the loan items against the CUL condition loan documentation for changes upon arrival, during exhibition, and at the conclusion of the exhibition. Conservation will respond to any noted changes.
 - Any needed stabilization or treatment, and upgrade to enclosures/housing as needed are scheduled in coordination with curator and Kate Carlin.
 - Coordinate routing with Kate Carlin.

SPECIAL NOTES:

Transport of Loans:

- To ensure door-to-door professional handling and best risk management practices, art shipping service is the standard for transporting materials to and from borrowing institutions. Rare materials are not shipped via common carriers (USPS, FedEx, etc), with the exception of facsimiles, duplicates, or very low value items as identified and approved by RMC.
 - Borrowing institutions are responsible for arranging, coordinating, and funding art shipping services.

Signing loan paperwork and receipts:

- RMC staff sign loan forms (outgoing and incoming).
 - For art shipper paperwork required at the point of pick-up or drop-off at the CUL loading dock, RMC may delegate the ability to sign art shipper receipts to the Conservation Lab, if lab staff is assisting with the pick-up or drop-off.

Couriering:

- Couriering by CUL staff is generally not necessary; exceptions require approval of the relevant RMC curator and RMC Director (or DCS Director if Conservation staff act as courier)
 - Most items do not require in-person installation supervision by CUL staff at borrowing institution; curators and conservators consult when exceptions may be necessary due to the loan of an especially high value or fragile item, or if a loan request involves a large number of rare items; special handling and/or installation instructions are provided as needed.
- Virtual couriering/consultation is now common and available for installation or deinstallation.

LOANS TO THE HFJ MUSEUM OF ART:

Major gallery exhibitions:

- Loans to the HFJ Museum of Art for major exhibitions follow the steps outlined here.
- The HFJ Museum facilities report does not have to be reviewed at each loan. RMC/Conservation communicate with the HFJ Museum about any special needs (e.g., handling, environmental conditions, light levels).
- The Conservation timeline will be determined by the number, type, and condition of item(s) for loan.
- Conservation usually provides book cradles but not flat mounts, or mats/frames.
- The HFJ Museum of Art has their own paperwork to document and track items on loan to them.
- RMC staff sign the HFJ Museum paperwork and receipts.
- All RMC materials being loaned to HFJ Museum need an outer layer of protection (e.g., an archival box or secure packing).
 - Conservation will pack as needed.
- Vehicle transport is recommended for moving collection material to/from the HFJ Museum of Art to secure the items in transit and protect from the weather.
- Hand carry by RMC or HFJ staff presents some risks.
 - RMC Curator approval is required for hand carry.
 - Students or interns do not transport RMC collection items.
 - Hand carry may be acceptable for small number of stable items, and if the weight of the packed items is low, and weather conditions are safe. Oversize, heavy, or vulnerable materials should be transported by vehicle.
- HFJ Museum has their own van. Pick-up and drop-off is arranged by Kate Carlin.

HFJ Museum short-term instruction, study room, or class display uses:

- Kate Carlin will notify Conservation if a condition review is required.
 - Timelines for conservation treatment and any needed mounts will be determined at this time. Usually 1 month notice is required if treatment/stabilization is needed.

- Steps listed above for routing will be followed.
- All RMC materials being loaned to HFJ Museum need an outer layer of protection (e.g., an archival box or secure packing).
 - Conservation can advise on packing and transport.
- Hand carry by RMC staff or HFJ staff presents some risks.
 - RMC Curator approval is required for hand carry.
 - Students or interns do not transport RMC collection items.
 - Hand carry may be acceptable for small number of stable items, and if the weight of the packed items is low, and weather conditions are safe. Oversize, heavy, or vulnerable materials should be transported by vehicle.