



**National
Trust**

National Trust Loans Out Procedure

Founded in 1895, the National Trust is an independent charity empowered by Acts of Parliament to hold its properties and collections in Trust for the Nation. Our mission is the permanent preservation of places of historic interest and natural beauty “forever, for everyone” together with their collections. As an independent charity, the National Trust receives no government funding. Instead, annual subscriptions and paid admissions provide our core funding. 5 million members pay an annual subscription in exchange for access to its properties. During 2016/17, an additional 24.5m paid an admission fee for entry.

There are currently 372 collections in England, Wales and Northern Ireland, of which 144 are Accredited Museums; the Trust as a whole is, since 2015, an Accredited Museum Authority. This is an acknowledgement of its high professional standards of curatorship and conservation.

For a complete catalogue of the National Trust Collections, we suggest accessing the web link www.nationaltrustcollections.org.uk

Loans to Exhibitions

Providing inspiration to visitors and publishing research on the history and display of its collections is of fundamental importance to the National Trust. Loans to exhibitions are regarded as a significant factor in providing access to Trust Collections, particularly from November to March when some houses have reduced opening hours. Loans also promote research and comparison between works of art, allowing a level of close scrutiny that is often impossible due to the historic arrangement and vulnerability of historic interiors.

Exhibitions can reach a larger and different (including urban and foreign) audience, diffusing knowledge both of the works of art themselves, and of the collections from which they come. The display of works of art in new contexts, in company with other works, or with a specific focus is advantageous for scholarship as well as for viewer appreciation. The National Trust supports loans from its collections to exhibitions arranged by other organisations.

Loans Policy

The National Trust, as a charity, has a policy to charge an administrative fee for processing loans to external exhibitions. All income from these fees is re-invested in our loans programme to ensure that we have a self-sufficient system in place. The minimum loan fee for loans to the UK is £350 and minimum loan fee for loans abroad will be £1,200.

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President: HM The King
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Heelis, Kemble Drive, Swindon, Wiltshire SN2 2NA
Registered charity number 205846



While the Trust remains committed to a continuous programme of loans to exhibitions, and every loan request is considered on its individual merits, there are certain criteria that must be met for a loan to proceed. This process begins with an internal assessment by the Trust's Loans Review Board of the aims and seriousness of the exhibition and whether there is sufficient justification for lending the requested object(s). See section: *How to Request a Loan* on page 3.

Some types of object are too vulnerable and fragile for the rigours of transit and exhibition loan, and requests may be refused for this reason alone (e.g. in the case of pastels, unlined paintings, unstable panel paintings, large sculpture, fragile wood carvings, and furniture decorated in gilt gesso, ivory, marquetry, Boulle-work or some textiles). Some objects may only be pronounced unfit to lend following a detailed examination by a conservator. In such instances the Trust endeavours to give as much notice as possible that an object is not in a suitable condition to be lent. Loan items have to be removed from the fragile interiors of historic buildings and access to some estates, and to the buildings themselves, is sometimes limited. Small fine-art vehicles may be necessary to negotiate narrow roads, gateways or arches, and de-installation from rooms within some properties can sometimes be time-consuming and costly. Some properties cannot take heavy lifting equipment and many have low internal doors, limits on weight on staircases and other de-installation or access issues. The Trust will advise accordingly, but in some circumstances may specify specialist conservators and/or a particular fine-art company that must be used, at the cost of the borrower.

The approval of any loan request is based on its meeting these criteria and the Trust's *Terms and Conditions and Annex 1 Particulars of Loan*. A few of the key considerations have been mentioned above but the main points are set out here, for reasons of clarity:

- The borrowing authority or institution where the loan will be displayed must be a publicly administered and accredited museum or recognized educational, cultural, scientific, or other approved body, whose corporate legal responsibility and conservation standards can be relied on.
- Requests for UK loans should be made a minimum of 9 months before the opening of the exhibition. A longer notification of 12 - 18 months is necessary for all international loans and for loans of between 7 - 12 objects or from more than 2 National Trust properties. Submitting the request on time does not automatically mean that the loan will be approved. We have limited capacity, so loans will be approved on a first come first served basis once the other factors have been taken into account.
- Only loans of up to 12 objects from up to 3 National Trust properties will be considered under this *Loan Out Procedure* (8 objects if requested from the collection at Chartwell). If you are planning to request over 12 objects from the National Trust Collection or from over 3 properties, please write to the Registrar separately at least two years in advance of the start of the exhibition and include the final list of objects. This will require a specific project agreement with extra resources allocated.
- Loans will usually be made to exhibitions at a single location only. For multiple venues, the Trust may restrict lending to one or two venues only.
- The object(s) must be in a fit condition to be exhibited and able to withstand the strains of packing, transportation, handling, installation and display.

- Loans are made subject to the current *Terms and Conditions and Annex 1 Particulars for Loans*. The borrowing institution and any proposed venue must be able to demonstrate their ability to meet both current museum standards and the current *Terms and Conditions and Annex 1 Particulars for Loans* (particularly with regard to environmental conditions and security).
- The proposed exhibition must demonstrate that it promotes public appreciation and knowledge of the object(s) and its/their context, or of the properties and work of the National Trust.
- The proposed exhibition must demonstrate that there is benefit in terms of conservation, research, publication, or photography, associated with it.
- The Loans Review Board will take account of the views of the donor family (the family associated with a particular house and often still resident in part of it), National Trust Regional Committees, curator, conservator, house staff, and any other interested parties such as tenants, when considering a loan application.
- The Loans Review Board will also take into account pressure on National Trust staff resources.
- The terms of acquisition of an object, whether through a donor family or with assistance from a grant-giving body, may have a bearing on whether or not an item can be lent.
- National Trust programmes and projects will be prioritised over loans for external exhibitions.
- For the long-term protection of works of art the Trust will not normally allow an object to be lent more than once within any five-year period.
- Some types of object are too vulnerable and fragile for the rigours of transit and exhibition loan, and requests may be refused for this reason alone particularly fragile objects (e.g. pastels, ivories, works on vellum, unlined paintings, textiles, and gilded, gessoed, veneered or other vulnerable furniture), except in very special circumstances, and when special precautions have been taken. In every case, the long-term stability of the object is the paramount consideration.
- All fees raised will be re-invested in the National Trust's loans to exhibitions programme.

How to Request Items for Loan from the National Trust Collections

A formal request letter can be made in writing to the Director General, the Curatorial and Collections Director or the Lead Registrar (please always send a copy of the letter to the Lead Registrar). The application deadline will close two weeks before the Loans Board meets. Any application received after this date will be discussed during the next meeting.

The loan process is managed centrally by the Collections Management Team. Each loan request is assigned to a named registrar who coordinates the National Trust's response and is the point of contact once the loan has been approved. Please do not write to the National Trust historic properties direct.

Director General	Hilary McGrady National Trust Heelis, Kemble Drive, Swindon, SN2 2NA
Curatorial and Collections Director	Dr. Tarnya Cooper National Trust Heelis, Kemble Drive, Swindon, SN2 2NA

Please include as much of the following information as possible:

- Title of the exhibition
- Exhibition venue(s) and dates
- Organiser's name, address and contact details (e.g. telephone; e-mail)
- Scope of the exhibition
- List of items requested, where possible quoting the exact name and inventory number which you will be able to find in our online catalogue: www.nationaltrustcollections.org.uk
- Reasons for inclusion of the item(s)
- Expected number of visitors to the exhibition
- Whether members of the public will be charged an entrance fee or the exhibition is free of charge

Requests for UK loans should be made a minimum of 9 months before the opening of the exhibition. A longer notification of 12 - 18 months is necessary for all international loans and for loans of more than 5/7 objects or from more than 2 National Trust properties. For objects owned by third parties on long-term loan to us, the borrowing institution will arrange for their loan agreement to be signed directly with the owner. The Registrar will advise on how to contact the owner.

For any general or further enquiries relating to exhibition loans, please contact the Lead Registrar. Please note that we cannot undertake research on the borrower's behalf. Please make the initial selection of objects using www.nationaltrustcollections.org.uk

Should you need advice on any particular aspect of a loan, please contact the following people:

Paintings, sculpture, drawings, watercolours, miniatures and any other works of art not covered by the other curators.	Dr John Chu, Senior National Curator National Trust 20 Grosvenor Gardens, London, SW1W 0DH
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Furniture	Megan Wheeler Assistant National Curator, 20 Grosvenor Gardens, London, SW1W 0DH
Decorative Arts (Ceramics, Glass, Objects d'art, Modern and Contemporary Craft)	Dr Rachel Conroy Senior National Curator Heelis Kemble Drive Swindon SN2 2NA
Decorative Arts, (Silver, stained glass, arms, armour, jewellery and metalwork)	James Rothwell National Curator 20 Grosvenor Gardens, London, SW1W 0DH
Books and Manuscripts	Tim Pye, National Curator 20 Grosvenor Gardens London, SW1W 0DH

The Loans Process

Your loan request will be acknowledged formally by letter or email. The request will then be passed on to the relevant members of staff including property managers, house and collections managers, conservators and curators for assessment. In some instances, the loan request will be circulated to four or five members of staff and this requires time, as they have to fit these checks with their day to day duties.

The request will then be formally considered by the Loans Review Board, which meets quarterly. After the Loans Review Board meeting, a letter will be sent to you to confirm whether the loan request has been approved (subject to the National Trust's usual *Terms and Conditions and Annex 1 Particulars for Loans Out*) or declined, and whether there are any additional factors relevant to the loan request. At this point an initial loan fee will be given.

Loan requests cannot be processed unless the borrowing institution accepts and complies with the National Trust's *Terms and Conditions and Annex 1 Particulars for Loans Out*. This includes agreeing in advance to meet all costs associated with the loan and with processing the loan request. The Trust reserves the right to cancel or recall any loan if the conditions are not complied with and/or if continuation of the loan poses a significant risk to the loaned object(s).

Once the loan has been approved in principle, the Registrar will work with the relevant National Trust conservation specialist or regional conservator to obtain an initial condition assessment of the work. Sometimes it is necessary to contract an external conservator to undertake this work; the cost of this external conservator will be borne by the borrower.

Once the assessment has been carried out, a realistic budget will be prepared and sent to the borrower. At that point we will ask the borrower to agree to meet the costs. No work will be undertaken without prior approval of the borrower. As an indicative guide only we have drafted an estimate table of costs for (please see Appendix I). It is not intended as an exhaustive list, but covers the majority of common costs for loans.

Once all information regarding the loan and practicalities have been finalised in accordance with *Terms and*

Conditions and Annex 1 Particulars for Loans Out a loan agreement will be prepared and entered into by all parties.

Our staff will not reply to loan requests over the telephone.

Remedial Conservation

We have limited in-house conservation studio capacity or conservators available to undertake remedial conservation therefore an external freelance conservator will generally be needed. The National Trust Textile Conservation Studio and Knole Conservation Studio operate as commercial enterprises and thus will charge for their services. The National Trust will normally ask external conservators to undertake the conservation work in situ in order to avoid the need to transport the work of art to a conservation studio. However in some instances it will be necessary to transport the loan object to the conservation studio. In such cases the National Trust will inform the borrowing institution beforehand and will seek their approval and agree on a transport company. If extra insurance is necessary to cover the work during transit and its stay at the conservation studio, the Registrar will ask the conservator to provide a cost of extra insurance and will consult with the borrower before committing to any extra insurance costs.

In a few instances, the National Trust may agree with borrowers that remedial conservation work be undertaken in the conservation studios in their institutions. This will normally only be considered for loans to UK national museums or large UK regional museums or art galleries. The conservation treatment will, in this instance, need to be approved by the relevant NT Conservation Adviser.

Frames

Most of the National Trust's frames are either original to the paintings or of historic importance. The National Trust will ask the external paintings conservator assigned to each project to produce an initial condition assessment of the frame as well as the painting. However, a frame conservator may be needed in order to produce an individual condition assessment for the frame. This cost will be on top of the condition assessment of the painting. This decision will be taken by the relevant National Trust specialist adviser and the borrower advised accordingly. Any paintings that have been un-framed/re-framed will need to be returned to their original state. The regional conservator may have capacity to do this upon return of the loans to the property otherwise a frame conservator will be needed. The Registrar will advise on a case by case basis.

Mixed Media

Some historic works of art are made up of various types of materials. In some instances it will be necessary to obtain condition assessments from more than one specialist conservator and if any remedial conservation work is needed then various conservators will have to treat different parts of the same object. The decision to use more than one conservator will be taken by the relevant National Trust specialist adviser and the borrower advised accordingly.

Borrowing Books

A formal conservation assessment and report will be carried out by the adviser on libraries or conservators appointed by them. The conservation assessment will stipulate any conservation treatment (if any) and cost.

It will also provide measurements of the book for cradle manufacturing. It is the National Trust’s policy to provide cradles or mounts to support books while on display.

The potential borrower should supply the following information as soon as it is available, in order to facilitate the assessment of the book and planning for its display:

1. Is the book to be displayed open or closed?
2. What part of the book is the loaning institution requesting to display? E.g. title pages, dedication, fold out map, decorative front board?
3. Is the book to be displayed horizontally? If not, at what angle from the horizontal, 10°, 15° or 25°?

Borrowing Textiles

Textiles, especially costumes, are extremely labour-intensive to conserve, mount, pack, and display, hence the high costs associated with them. In some instances the Registrar will work with an external textile conservator to prepare the textiles for loan. In other instances the Registrar will work with the National Trust Textile Conservation Studio.

In some instances it will be necessary to courier textiles to the borrowing venue for mounting or the borrowing venue will need to have a textile conservator in their staff to mount costumes. The Registrar will provide costs and guidelines for conservation, mounting, packing and mannequins or display on a case by case basis.

Appendix I

Table of Costs (all costs exclude VAT)	Minimum	Maximum
Conservator Costs:		
Initial condition assessment Fees for external conservators to examine the object(s) and draw up an initial condition assessment.	£150 per object	£400 per object
Costs for remedial conservation treatment	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis
Preparation of final condition report and preparation of the object for loan and display	£150 per object	£400 per object
Frames - initial condition assessment	£250 per frame	£400 per frame
Frames - costs of remedial conservation work	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis
Mixed media	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis

Borrowing books	Book conservator minimum per visit: £350 <u>Cost of Book Cradle</u> Board: £15 - £25 each. Perspex/acrylic: £100 - £ 120 (prices excluding VAT)	Book conservator maximum per visit: £500 (maximum of 5 books)
Borrowing textiles	Registrar to advise on a case by case basis.	Registrar to advise on a case by case basis
Condition report, remedial conservation work upon return from exhibition and re-framing in to original frame.	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis
Extra Insurance costs	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis

Transit Costs:		
Costs associated with the removal of the object from its location within the property and/or handling	Registrar to advise on a case by case basis Scaffolding: £700 x 2 Removing a chandelier from the ceiling: £1500 x 2 Structural survey: £675	Registrar to advise on a case by case basis Scaffolding: £2,500 X 2
Re-arranging displays	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis
Extra transport	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis

Specialist packing	Registrar to advise on a case by case basis	Registrar to advise on a case by case basis
Costs of crates The crate leasing company will invoice the borrower directly.	£350 per object	£800 per object

Other Costs:		
Administration fee	The Registrar will advise on a case by case basis. Minimum fee for UK loans: £350	The Registrar will advise on a case by case basis. Minimum fee for overseas loans: £1,200
Travel and subsistence for couriers	An equivalent of £70 per day for a trip abroad with overnight stay. Extra UK taxies/mileage to and from nearest train stations/airports to the National Trust property or courier's home For one day courier trips to UK venues, £20 to cover the cost of subsistence.	
Valuation of loan items	Registrar to advise on a case by case basis Minimum Fee: £100	Registrar to advise on a case by case basis. £500.

<p>Photography Existing images: National Trust images are provided free of charge for press packs, all other uses will incur reproduction fees</p>	<p>Exhibition catalogue Up to 10,000 (World, All Languages), full page: £130</p>	
<p>New Photography: Charges for new photography apply on a per session or half session basis (one session is one day, and usually one property visit) 1/2 session = £400 1 session = £800. Travel time is charged if return journey takes four or more hours. E.g. 4 plus hours = £400. Post production per image: £20 Fuel = 45p per mile National Trust Images will invoice you directly</p>	<p><u>Example 1:</u> 1/2 session @ 1 property; X2 objects photographed (2 images); 2 hour journey = £440 (£400 + £40 = £440)</p>	<p><u>Example 2:</u> 3 sessions @ 3 properties; X10 objects photographed (10 images); 1 hour + 1 hour + 4 hour journeys = £3,000 (£800 + £800 + £800 + £200 + £400 = £3,000)</p>