



**State Archives
& Records**

Operational Policy

OUTWARD LOANS POLICY

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1. Summary

This policy provides guidance around the loaning of items from the NSW State Archives collection for the purpose of exhibition and displays.

2. Introduction

NSW State Archives makes State archives available through its reading room, website, and Community Access Points throughout New South Wales. In certain circumstances, original State archives are also made available to approved cultural institutions for exhibition. All such loans are subject to the following conditions.

3. Objectives

The objectives of the policy are to:

- Set criteria around the lending of State archives for outward exhibition loan
- Assist in mitigating risk of damage to State archives while on loan

4. Scope and application

This policy applies to staff from Collections Access and Engagement who undertake activities associated with assessing, approving and administering outward loans.

5. Definitions

Outward loan – a temporary bailment of an item or items from the State Archives Collection to an outside institution for the purpose of exhibition or display. Legal custody and control of the item remains with NSW State Archives

Loan Agreement – a formal contract between NSW State Archives and the borrowing institution outlining the terms and conditions of the loan.

Item – term used to describe collection material (State archives) requested for loan.

6. Policy statement

NSW State Archives loans items from its collection to approved institutions for the purpose of exhibition or display.

The lending of archives to approved organisations aids in increasing access to State archives, builds relationships with other cultural institutions and assists in raising the profile

of NSW State Archives and its collection. Loan requests must meet the following criteria.

Loan Criteria

1. State archives will normally be made available only to recognised institutions with appropriate environmental conditions, established exhibition programs and appropriate professional staff.
2. Requests for loans must be made in writing to the Director, Collections Access and Engagement. All requests should be made at least six months before the exhibition's opening date, and must include exhibition title, dates/duration and venue, as well as details of items being requested.
3. All items requested will be assessed by State Archives conservators. State Archives reserves the right to decline approval for the loan of any item; e.g., if the risks associated with removal and display are deemed to be unacceptable.
4. Items approved for loan are to be insured and the cost of the insurance is to be borne by the borrowing institution.
5. The borrowing institution must provide a satisfactory current facility report.
6. There will be a charge for each item approved for loan (see below).
7. All loans must be covered by an outgoing loan agreement signed by both NSW State Archives and the borrowing institution.

Fee structure

1. There will be a standard minimum fee of \$500.00 (plus GST) for each item approved for loan. The standard fee is to recover costs of administration and preparation of the loan where the request has been received at least six months before the date of the exhibition, an item has been correctly identified and referenced, and requires only basic conservation assessment and packaging.
2. If loan requests are received within the six month period, State Archives reserves the right to decline the request, or apply a minimum charge of 150% of the standard fee.
3. Additional charges may apply in cases where State Archives has to undertake research to identify and locate items when references supplied are vague or inaccurate.
4. Charges above the standard fee may also be incurred when an item requires

conservation treatment or special mounting to make it stable for display and/or travel. Fees will be charged at 150% of the staff costs involved in treating the item. The borrower will be notified in writing of any additional charges prior to the loan being approved.

5. State Archives will discuss the issues and options with the borrowing institution in all cases where additional conservation or mounting/preparation work is required or requested. State Archives reserves the right to place an upper limit on the amount of work to be done on a particular item.
6. Once State Archives confirms approval in writing, the borrower is liable for the standard fee plus any additional charges incurred up to that point in the preparation of items requested. The charges will still apply in the event the loan request is subsequently cancelled in full or in part.

Packaging and transport

All loans will be normally be packaged by State Archives' conservators. Delivery will be by a State Archives' courier wherever possible. Where packaging and transport has to be undertaken by external firms, the borrower will be required to pay all associated costs. Use of external firms for packaging and transport will only be permitted after approval by State Archives.

7. Procedures

1. Formal letter of request for loan is made by borrowing institution to Director, Collections, Access and Engagement.
2. Officer, Collection Digitisation requests conservation assessment of loan items.
3. Loan is assessed for approval by State Archives conservation staff. Conservators stipulate handling and display conditions for loan items.
4. Loan is assessed for approval by Director Collections, Access and Engagement.
5. Formal letter approving or declining the loan is sent to the institution requesting the loan.
6. Items approved for loan are prepared by State Archives' conservation staff including any conservation treatments required, condition reporting and preparing the loan for transport and display.
7. Officer, Collection Digitisation manages and administers the loan agreement, liaises with the borrower throughout the loan process, negotiates costs of the loan with the borrower, processes the loan including invoicing and recording and tracking the loan in the Archival management system SAMS.

8. Officer, Collection Digitisation organises transport of the loan to and from the borrowing institution.

8. Accountabilities

Positions with significant responsibilities are:

Position	Responsibility
Officer, Collection Digitisation	Manages and administers the outward loan.
Conservation staff	Assesses and approves the items for loan. Treats and prepares items for loan.
Director, Collections Access and Engagement	Formal approval of loan, sign off of loan agreement.

9. Review

Reviews will be undertaken by Director, Collections Access and Engagement and Officer, Collection Digitisation at least every three years, and more frequently if changes in legislation, policies or other areas require the amendment of this policy. The next scheduled review is due on June 2023.

10. Contacts

For enquiries please contact

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