|  |
| --- |
|  |
| Museum Collections Management Form Templates |
| The following set of collections management forms should be altered or updated with the museum’s own branding, policies and procedures, or specialties. They can be printed and filled-in by hand or they can be filled-out on a computer or other device.  **Templates include:**   * Acquisition Proposal Form * Accession Form * Donor Questionnaire * Deed of Gift * Bequest Pledge Form * Cataloging Worksheet * Condition Report Form * Deaccession Form * Incoming Loan Agreement * Outgoing Loan Agreement * Incident report form |

**Acquisition Proposal Form**

|  |  |
| --- | --- |
| **Meeting Date:** |  |
| **Submitted by:** |  |
| **Presented by:** |  |

**Committee members voting:**

**Type of proposed acquisition:**

|  |  |
| --- | --- |
| Gift/Donation | Purchase/Commission |
| Fractional Interest Gift | Bequest |
| Transfer | Exchange |
| Scientific acquisition |  |

**Acquisition Data:**

**Be sure to include an image(s) of the item(s)**

Description:

Artist/Maker/Creator/Collector Name(s):

Title(s): Date(s):

Medium and Support:

Dimensions:

**Acquisition Questions:**

|  |  |
| --- | --- |
| Does the acquisition support current collecting priorities? | Yes  No |
| Does the acquisition support the museum’s mission? | Yes  No |
| Does the acquisition have clear legal title? | Yes  No |
| Are there works other similar objects/items already in the collection?  Are there sufficient funds and staff capacity to care for this? | Yes  No  Yes  No |
| Would the proposed acquisition enhance the permanent collection? | Yes  No |
| Any storage/condition concerns? If yes, list:  Is copyright transferred to the museum? | Yes  No  Yes  No |

**Provenance:**

**Committee member comments:**

**Approved:**  Yes  No

**Accession Form**

|  |  |
| --- | --- |
| **Date:** |  |
| **Accession #:** |  |

**Accession Information**

Donor/Source/Method of Acquisition:

Date of Acquisition:

Acquisition Price:

Deed of Gift Signed:  Yes  No

Date Signed:

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Be sure to include an image(s) of the item(s)**

**Provenance**

Item Name:

Description:

Artist/Maker:

Place of Origin:

Date of Creation:

History:

Previous Owners:

**Item Information**

Dimensions:

Materials:

Condition:

Estimated Value/Appraisal (as conducted by a third-party appraiser): $

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Accessioned by Date Entered

**Donor Questionnaire**

|  |  |
| --- | --- |
| Date: |  |

**Contact Information:**

|  |  |  |
| --- | --- | --- |
| Last: First: MI: | | State/Country: |
| Street address: | City: | Zip code: |
| Phone: | Email: | |

­­­­­­­­­­­­­­­­­­­**Tell us about your item(s):**

What is/are it/they?

When was/were it/they made?

What was/is it used for?

Tell us as much about the history of the item(s) as you know. For example: How did you acquire it? From whom? When and where? (Use the back of this sheet to fully explain, if necessary.)

**Tell us about yourself (and if you are not the owner tell us about the owner of the item(s)):**

**Deed of Gift**

**We highly recommend having legal counsel review any such documentation.**

**DELETE THIS BOX**

I (We) hereby irrevocably and unconditionally convey, donate, give, and deliver to the **[Museum]** all rights (including copyrights), title and interest in and to the item(s) listed below. I (We) affirm that I (we) own said item(s) and have complete right, title, and interest in said item(s) and that the item(s) is/are not subject to any liens, claims or encumbrances. By my signature, I assert my understanding of the above conditions and those listed on the back of this agreement.

This gift is given to the **[Museum]**for its fundraising purposes as it deems appropriate.

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description of Item(s)**

(Include artist, title, date, medium)

**Be sure to include an image(s) of the item(s)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

I (We) wish the gift to be identified as:

**Gift of:**

**Name of Donor (please print):**

**Telephone:**

**Address:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Signatures**

*The* ***[Museum]*** *hereby accepts the gift(s) described above.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Museum Director Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Donor/Donors Date

*Complete both copies of this deed of gift and return them to the* ***[Museum]****. A signed copy will be returned to you.*

**ACQUISITION AND DISPOSITION POLICY OF THE [MUSEUM]**

**Add in the museum’s own approved Acquisition and Disposition Policies or use these more generic terms to develop your own policies.**

**DELETE THIS BOX**

* The **[Museum]**is organized and operated for educational purposes and is tax-exempt as a 501(c)3 non-profit entity.
* **The [Museum]does not appraise item(s) given to the museum**. Donors can have items appraised prior to donation. If the donor(s) wish an authorized agent of the **[Museum]**to sign the appropriate IRS documents regarding the gift (8283 form), a copy of the appraisal documents with values must be filed with the museum.
* Items not on public display are generally available for study to scholars, researchers, and scientists.

**ACQUISITIONS**

* The **[Museum]** may acquire items under the following conditions:

1. Item(s) that are relevant to and consistent with the mission and activities of the museum.
2. Item(s) for which the museum can provide proper storage, protection, and preservation.
3. Items are acquired through gifts, purchases, or transfers.

* The **[Museum]**will not accept items with restrictions or conditions. All title and any applicable copyright for all item(s) becomes the sole property of **[Museum]**and is obtained free and clear for use or future disposition. The **[Museum]**may make an exception in cases where the donor does not own the copyright, and in which case the **[Museum]** will make every effort to establish copyright ownership.
* All items obtained for the **[Museum]** are the property of themuseumand not that of any individual paid or unpaid staff member of the **[Museum]**.
* The **[Museum]** does not accept items which have been illegally imported or exported as set forth in the 1970 UNESCO Convention on the Means of Prohibiting and Preventing the Illicit Import, Export, and Transfer of Ownership of Cultural Property, or subsequent agreements, or applicable state, or federal statutes.
* The **[Museum]** does notguarantee that donated items will be placed on display, to keep donated items together as a unit, or to acknowledge publicly the donor’s name with each item used in an exhibit.
* Recommendations on the acquisition of items for the collections will be the responsibility of **[list who has authority to accept items into the collection/s].**
* The **[Museum]**will keep and maintain complete accession records for all items acquired for the collections.

**COLLECTIONS**

* The collections of the Museum consist of **[list what the museums collects – art, cultural, historical etc.]** and are owned outright and constitute an important part of the museum. The **[Museum]**maintains **[list what types of collections]** **[For example:**

1. Permanent Collections – includes items that are in excellent condition, are unique, or well-documented. Permanent Collections items are accessioned, cataloged, and deaccessioned (prior to disposal).
2. Teaching Collections – includes items that are sufficiently unique and of suitable quality to be useful for staff-managed teaching situations. Such material is valued more for its representative characteristics than for any associated documentation and items may be used until destroyed.

**DEACCESSIONING AND DISPOSING OF ITEMS FROM THE COLLECTIONS**

* Deaccessioning of an item(s) may be considered at any time when items in the collections no longer align with the museum’s mission, no longer continue to be relevant and useful to the purposes and activities of the **[Museum]**, can no longer be properly stored, preserved, or it is in the best interest of improving the collections.
* Items will be deaccessioned only upon recommendation of **[list who has authority for approving deaccession decisions].**
* Deaccessioned items will not be returned to donors (under penalty of law).

I, the undersigned, acknowledge that I agree to the terms and conditions stated in this agreement. **Initial:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Bequest Pledge Form**

**We highly recommend having legal counsel review such documentation.**

**DELETE THIS BOX**

*I (We)* *pledge to bequest to the* ***[Museum]*** *the item(s) described as follows:*

I (We) understand that this gift will be given outright, unconditionally, unrestricted, and irrevocably, and will include all rights, title, and interests (including all copyright, trademark and related interests I (we) can convey), in, to and associated with the item(s) described. I (We) affirm that I (We) own said item(s) and to the best of my (our) knowledge I (We) have good and complete right, title, and interests (including all transferred copyright, trademark and related interests) to give. To the best of my (our) belief, said item(s) has not been imported or exported into or from any country contrary to its law.

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Description of Item(s)**

(Include artist, title, date, medium; attach separate sheets as needed)

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

I (We) wish that the bequest be identified to the public and in the records of the **[Museum]** as

**Bequest of:**

**Name and address:**

**Telephone:**

**Pledgor/Pledgors:**

**Email:**

**This pledge accepted by the [Museum] on:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signatures**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of museum Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Pledgor / Pledgors Date

**Cataloging Worksheet**

|  |  |
| --- | --- |
| **Date:** |  |
| **Accession #:** |  |

|  |  |  |
| --- | --- | --- |
| **Catalog Number:** |  | **Files created:**  Item file  Artist file  Digital file |
| **Item Name:** |  | |

|  |  |
| --- | --- |
| **Item Information:** | |
| Artist/Maker: |  |
| Nationality/Culture/Place of origin: |  |
| Title: |  |
| Date of work: |  |
| Dimensions:  Inches (h x w x d) |  |

|  |  |
| --- | --- |
| **Acquisition details:** | |
| How acquired? |  |
| When acquired? |  |
| Credit Line: |  |
| Name & Contact Information: |  |
| Comments: |  |

|  |  |
| --- | --- |
| **Description:** | (Include: media - pencil, ink, etc. - and location of identifying marks) |

|  |  |
| --- | --- |
| **Condition:** | |
| Excellent  Good  Fair  Poor | |
| Conservation needs: | |
| **Collection Type:** | Permanent  Educational  Other |
| Collection Category: (Mark the most relevant category.) | **[The following are examples – choose categories that most closely resemble your collection]**  Art  Archives  Ephemera  Specimen  Item  Furniture  Vehicle  Digital |

**Additional information attached:**

Artist biography  Cultural or People Group information  Research on medium  Provenance

**Condition Report Form**

|  |  |
| --- | --- |
| **Date:** |  |
| **Accession/Loan #:** |  |

|  |  |
| --- | --- |
| **Item/Title/Description:** |  |
| **Artist/Maker:** |  |
| **Date:** |  |
| **Medium:** |  |
| **Overall Dimensions:** |  |
| **Overall Condition:** (check one) | |
| Excellent  Good  Fair  Poor | |
| In need of conservation | |

|  |
| --- |
| **Condition:** |
| **Identifying marks: (including signatures/inscriptions/marks/labels) and location:** |

Reported by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name, Title, Institution Date

**Images offer a great opportunity to note exactly where condition challenges are located.**

**DELETE THIS BOX**

Additional images attached.

Sent to conservator.

Name:

Contact Information:

**Deaccession Form**

|  |  |
| --- | --- |
| **Date:** |  |
| **Accession #:** |  |

**Item:**

Description (including donor, collector, locality, additional numbers, etc.):

**Be sure to include an image(s) of the item(s)**

**Reason for deaccessioning:**

Not relevant to mission

Not consistent with collection scope

Cannot provide adequate care

Duplication in collection

Deteriorated beyond use

Health/safety hazard

Repatriation

Transfer to another institution

Other

**Recommended Disposal:**

**Board/Committee Approval (date of vote):**

**Means and Date of Disposal:**

|  |
| --- |
| **Decision**:  Accept recommendation  Reject recommendation |
| **Signature**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Director’s Signature Date |

|  |  |
| --- | --- |
| **Deaccession #:** |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature Date | |

|  |  |
| --- | --- |
| **Disposal:** |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Signature Date |  |

**Incoming Loan Form**

**We highly recommend having legal counsel review such documentation. We also recommend filling out and having on hand a copy of a** [**General Facility Report**](mailto:https://www.aam-us.org/2023/08/01/general-facility-report/) **Form.**

**DELETE THIS BOX**

|  |  |
| --- | --- |
| **Date:** |  |
| **Loan #:** |  |

**Contact Information:**

|  |  |  |
| --- | --- | --- |
| Name Last: First: MI: |  | State/Country: |
| Street address: | City: | Zip code: |
| Phone: | Email: |  |

**Loan Information:**

|  |  |  |
| --- | --- | --- |
| **Purpose of loan** |  | |
|  | Exhibition | Title of Exhibition: |
|  | Research | Acquisition Review |
|  | Other: |  |
| **Loan Period** | From [DATE] to [DATE] | |
| **Date of shipment** |  | |
| **Method of shipment** |  | |
| **Overall Condition:** | Excellent  Good  Fair  Poor | |

I, the undersigned, acknowledge that I have full authority and power to make this loan. I have read the above and the attached “Conditions Governing Incoming Loans” and agree to be bound by them.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Museum Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Lender Signature Date

Please review and sign both copies and return one in the envelope provided. The other copy is for your records.

**Return Information:**

Date returned: Packed by:

**Be sure to include an image(s) of the item(s)**

**Be sure to include an image(s) of the item(s)**

**CONDITIONS GOVERNING INCOMING LOANS**

**Add in the museum’s own approved Conditions or use these more generic terms to develop your own.**

**DELETE THIS BOX**

**GENERAL**

* The condition of all incoming loans is fully documented in writing using the **[Museum]**’s condition report form.
* If there is a change in ownership or change in the identity or address of the lender of any loaned item (whether through death, sale, gift, insolvency, or otherwise), the lender or their agent must promptly notify the borrower, in writing.

**DURATION**

* Incoming loans are not made for more than one year.
* If needed, the museum will submit a written request to the lender for a loan extension, at least three months prior to the expiration of the originally agreed upon end date.
* The **[Museum]** does not accept permanent loans.

**CARE AND EXHIBITION**

* The museum will provide the same care for borrowed items that it does in the safekeeping of its own property.
* Evidence of damage or loss to the items will be reported to the lender immediately and in writing and will include images of said damage.
* Unless authorized in writing by the lender, items will not be subjected to restoration, conservation, cleaning, pest treatment, destructive sampling or invasive techniques, or further preparation. If permission is granted for any of the above, a complete written and photographic record of materials and techniques will be supplied to the lender.
* It is understood by the lender that all items are subject to gradual, inherent deterioration for which neither party is responsible.

**INSURANCE**

* Items shall be insured at the Borrower's expense for the value stated on the attached list of items under an all-risk wall-to-wall policy subject to the following standard exclusions: wear and tear, gradual deterioration, insects, vermin, or inherent vice, hostile or warlike actions, insurrection, rebellion, nuclear reaction, nuclear radiation, or radioactive contamination.
* Should the lender request to additionally insure the item(s), lender will provide the museum with a certificate of insurance, or a copy of the policy made out in favor of the borrower prior to the shipment of the loan. The borrower must be notified in writing at least 30 days prior to any cancellation or meaningful changes in the lender's policy. Any lapse in coverage, any failure to secure insurance and/or inaction by the lender will release the borrower from liability for loss or damage.
* The **[Museum]** will provide proof of insurance to the lender upon request.
* The lender will provide the value for all borrowed items with documentation as to the current market or appraised value.

**TRANSPORTATION AND PACKING**

* The **[Museum]** will bear all costs of transportation and packing unless otherwise agreed to in writing.
* The borrower will return all loan items in the original packing material or a comparable alternative.

**COPYRIGHT AND REPRODUCTION**

* Except for loan-related publicity and condition documentation purposes, the museum will not photograph, cast, or otherwise reproduce an item without written permission from the lender.

**CREDIT**

* Unless otherwise specified by the lender, incoming loan items used for exhibition or publication will include a credit line reading: “Courtesy of (Lending Institution/Individual)”. The credit will be accompanied by the lender’s assigned catalog number when included in an exhibit catalog or research publication.
* The **[Museum]** will provide, at no cost to the lender, a hard or electronic copy of any publication resulting from the loan of items.

I, the undersigned, acknowledge that I agree to the terms and conditions stated in this agreement. **Initial:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Outgoing Loan Form**

|  |  |
| --- | --- |
| **Date:** |  |
| **Loan #:** |  |

**We highly recommend having legal counsel review such documentation. We also recommend having the borrowing institution submit a copy of the** [General Facility Report](mailto:https://www.aam-us.org/2023/08/01/general-facility-report/) **Form.**

**DELETE THIS BOX**

**Contact Information:**

|  |  |  |
| --- | --- | --- |
| Institution: |  |  |
| Name Last: First: MI: | **Title:** | State/Country: |
| Street address: | City: | Zip code: |
| Phone: | Email: |  |

|  |  |  |
| --- | --- | --- |
| **Purpose of loan** |  | |
|  | Exhibition | Title of Exhibition: |
|  | Research |  |
|  | Other: |  |
| **Loan Period** | From [DATE] to [DATE] | |
| **Date of shipment** |  | |
| **Method of shipment** |  | |
| **Overall Condition:** | Excellent  Good  Fair  Poor | |

I have read the conditions above and on the back of the first page of the loan form and agree to be bound by them.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Museum Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
 Lender Signature Date

Please review and sign both copies and return one in the envelope provided. The other copy is for your records.

**Return Information:**

|  |  |
| --- | --- |
| **Overall Condition:** | Excellent  Good  Fair  Poor |

Date returned: Received by:

**Be sure to include an image(s) of the item(s)**

**CONDITIONS GOVERNING OUTGOING LOANS**

**Add in the museum’s own approved Conditions or use these more generic terms to develop your own.**

**DELETE THIS BOX**

**GENERAL**

* Outgoing loans of permanent collection items are made to institutions only.
* Outgoing loans may not be made to a third party without prior written permission from the museum.

**DURATION**

* + The **[Museum]** does not make permanent loans.
  + Outgoing loans are made for no longer than six-months. If necessary and upon written request, an outgoing loan can be renewed for an additional six-month period.
  + The museum may recall loans at any time and for any reason. The museum will try to provide at least three months lead time for recall of loans.

**CARE AND EXHIBITION**

* + Loaned items will be protected and always properly cared for.
  + Items may not be analyzed using destructive sampling or invasive techniques.
  + Prior written permission is required for restoration, conservation, cleaning, pest treatment, or further preparation of items. If permission is granted for any of the above, a complete written and photographic record of materials and techniques used must be supplied to the museum.
  + There will be no changes made to the items record or label.

**PACKING AND TRANSPORTATION**

* The borrower shall bear all costs for packing and transportation and shall be at the same level as when items are sent by the museum unless otherwise agreed upon in writing.
* The borrower is expected to return loaned items in original packing material or must provide a suitable substitute.

**COPYRIGHT AND REPRODUCTION**

* + The museum retains copyright to any photograph, or other reproduction unless otherwise agreed upon, in writing.
  + Without prior written approval from the museum, the borrower shall not photograph, cast, or otherwise reproduce an item except for condition documentation purposes and loan-related publicity.

**INSURANCE**

* Items shall be insured under a wall-to-wall, all risk, fine arts insurance policy for the length of the loan. If the borrower is additionally insured, they will provide the museum with a certificate of insurance listing the museum as such prior to shipment of the objects.
  + The **[Museum]** will seek appraisals from accredited, unaffiliated appraisers for the replacement value of loaned items when possible. This value will set the coverage amount.
  + Museum staff will complete a condition report and/or take condition photographs. These records shall be of sufficient quality to establish the validity of an insurance claim.

**CREDIT**

* All outgoing loan items used for exhibition or publication will include a credit line that reads: Courtesy of **[Museum]**.
* The borrower shall provide to the museum, at no cost, a hard or electronic copy of any publication resulting from the loan of items.

I, the undersigned, acknowledge that I agree to the terms and conditions stated in this agreement. **Initial:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Incident Report Form

|  |  |
| --- | --- |
| Date: |  |
| Accession #: |  |

|  |  |
| --- | --- |
| **Date of incident:** | **Time of incident:** |
| **Location:** | **Reported by:** |

**Brief Description of Incident:**

**Witnesses and other persons involved:**

**Damage to item (create a new form for each item damaged):**

**Be sure to include an image(s) of the item(s)**

**Proposed remedies:**

**Actions taken:**

**Notifications sent to:**

|  |  |
| --- | --- |
| Director | Conservator |
| Curator | Security |
| Registrar/Collections Manager  Lender | Other: |