

Standards for touring exhibitions / Museums & Galleries Commission.

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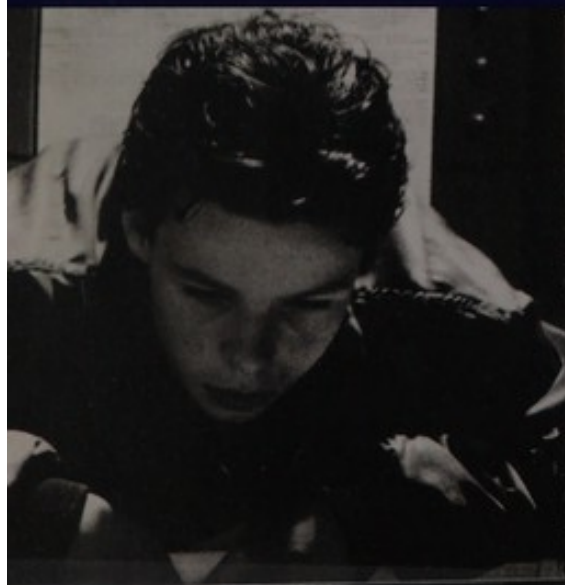


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STANDARDS

FOR TOURING
EXHIBITIONS



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MUSEUMS & GALLERIES COMMISSION

The Museums and Galleries Commission is a statutory body set up by the Government with the main aim of promoting museums and galleries throughout the country. The Commission is also a series of MGC publications aimed at raising museum standards.

I have always believed that touring exhibitions should be an integral part of museums' services to the public. I have supported the need, for financial reasons, to stage down the MGC's own Touring Exhibitions Club and I hope that the Touring Exhibitions Group and others are successful in their efforts to find new sources of funding.

Touring exhibitions are an ideal way to increase public access to collections, enabling collections to reach the corners of the UK and beyond. They are valuable both for attracting new visitors and for encouraging repeat visits. Touring can help to make an exhibition viable by enabling costs to be shared between several museums and they can also be attractive to schools of pupils. Touring exhibitions encourage cooperation between museums, encourage good practice and stimulate collections research.

Organising, travelling or lending to a touring exhibition involves a number of important considerations. This book presents a programme of best practice in these areas. Thanks are due to a great number of people.

I hope this book will enable many more people to share their experience and expertise in the creation of touring exhibitions.

Shirley Ardrey

Chairman, MGC

STANDARDS FOR TOURING EXHIBITIONS

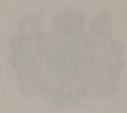
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Foreword

'The Museums and Galleries Commission advises Government on museum matters with the central aim of promoting museum and heritage interests, and raising museum standards.' The *Standards for Touring Exhibitions* is one in a series of MGC publications aimed at raising museum standards.

I have always believed that touring exhibitions should be an inherent part of museums' services to the public. I much regretted the need, for financial reasons, to close down the MGC's own Travelling Exhibitions Unit and I hope that the Touring Exhibitions Group and others are successful in their efforts to find new sources of funding.

Touring exhibitions are an ideal way to increase public access to collections, enabling collections to reach far corners of the UK, and beyond. They are valuable both for attracting new visitors and for encouraging repeat visits. Touring can help to make an exhibition viable by enabling costs to be shared between several museums and they can also be attractive to potential funders. Touring exhibitions encourage cooperation between museums, disseminate good practice and stimulate collections research.

Organising, receiving or lending to a touring exhibition involves a number of important considerations. This book presents a picture of best practice in these areas. Thanks are due to a great number of people.

I hope that this book will enable many more people to share their experience and expertise in the creation of future touring exhibitions.

Shirley Anglesey

Vice Chairman, Museums and Galleries Commission

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Introduction

This book is one of a series being published by the Museums & Galleries Commission to set out standards in various aspects of museum work. It sets out standards for lending to exhibitions, for organising exhibitions for tour and for taking full advantage of showings. Its purpose is to help museums and galleries of all types and sizes to deal successfully with touring exhibitions and to make their showings more effective.

How do we define a touring exhibition?

A touring exhibition is conceived and designed from the outset to be dismantled, packed, transported, unpacked and reassembled a number of times, so that it can be seen and enjoyed by visitors in more than one place of showing. A touring exhibition can be a collaboration between a small group of like-minded curators, or it can be a package which circulates to a large number of small venues.

As yet there are no general standards for one-off exhibitions and permanent displays, so it is inevitable that this book should embrace aspects that are not peculiar to touring. Publicity and customer care are, for example, common to all exhibitions, but could not be left out from these Standards in anticipation of a more general publication devoted to more permanent displays.

Why were these Standards necessary?

Exhibitions should delight, entertain, provoke and inform, but they vary as much as the organisers who create them and the venues that host them. A tour brings together people with different habits and methods, which can lead to inconsistencies and misunderstandings. These standards set out obligations and responsibilities both to protect the exhibits and to make the exhibition more effective.

Exhibitions are sometimes drawn from a single collection, but more often they bring together objects which are normally widely scattered. A single exhibition can involve different arrangements between the organiser and many lenders. Different expectations and procedures can lead to misunderstandings, so again these standards set out obligations and responsibilities to keep loans safe whilst making best use of them.

The Museums & Galleries Commission hopes that these Standards will help to unify practice and promote good relations without discouraging diversity. The Standards often stress the importance of written agreements and full documentation, but direct contact between staff and personal knowledge of facilities and abilities are equally important. Touring can help to foster mutual confidence and can share ideas between members of the museum profession who are often scattered and isolated.

How do we envisage these Standards being used?

The Standards represent a consensus of current professional opinion of best practice, but should still provide a stimulus for debate and discussion. The Museums & Galleries Commission believes that every organisation which organises or hosts exhibitions should be aspiring to reach these standards. We hope that this book will help these institutions towards the best practice compatible with their abilities and resources.

These Standards are addressed principally to museums and galleries with collections. However, exhibitions are made and used by exhibition galleries which do not have collections, and by arts centres, libraries and many other organisations. Exhibitions are also put together by individuals and groups. We hope that this document will be useful to these organisations and individuals, as well as to museums and galleries.

The book has been designed as a reference tool, to be consulted to find out what is best practice for a specific task. Not all of the practices apply to every exhibition, and an institution might consult the book to decide which factors are relevant to the particular project in mind. Examples of the possible use of this document might include the following:

- A lender is asked to lend to a touring exhibition, and wishes to make its exhibits accessible in ways that will minimise both the risk to the objects and costs. These standards will help to protect the loans and save expense.
- When planning an exhibition, an organiser has to decide whether to tour. These Standards will help it to determine what resources it would need to set aside or obtain, and to be confident that it embarks on a tour with a full knowledge, not only of its own tasks and responsibilities, but also what it should expect from its collaborators.
- An organiser is looking for guidance on the acceptable measures for borrowing exhibits. It needs to persuade potential lenders by offering appropriate safeguards. It also needs to know what outline requirements to discuss with potential venues. These standards will help to promote common procedures and standards.
- A venue is considering how to improve its performance, to help to make the case for attracting better exhibitions. The national standards in this booklet will be a benchmark for the venue's own objectives and performance indicators.

How are the Standards set out?

The book takes a functional approach, for example dealing with extremes of humidity is considered in the sections devoted to display cases and packing [see Sections 16 and 30]. This approach also means that there are no separate chapters on disability and multicultural issues. Instead, provision for people with visual impairments is part of the discussion of standards for interpretation, which ensures that textual material is not only improved for those registered as having a disability but is also easier for other visitors to read [see Sections 11 and 13]. The approach we have taken is that the care and attention that is necessary when designing for the needs of one group of people will enhance the efficiency and appeal of the exhibition for everyone.

Each section is divided into three parts:

The Standards

The main part of each section contains the Standards, printed in bold type. These begin with a statement of principle, which every museum should adopt if it organises or hosts a touring exhibition. Naturally, we hope that other institutions involved in touring will also adopt these principles. The standards have been sub-divided, to apply to the main parties involved in touring. Perhaps more than any other museum activity, touring involves cooperation and collaboration with others. Loans may come from other museum collections or from private lenders or artists. Design, transport and other tasks may be contracted out where they are beyond the expertise or capacity of organiser or venue. Above all, touring involves liaison and cooperation with venues. A museum may be a lender, a borrower or a venue at one time or another, so the Standards are sub-divided into these three perspectives. Every Standard looks at the general principle from each perspective, and sets out a list of responsibilities and obligations for each party. In some cases, the lender may not be involved and so is omitted.

Guidelines and notes

These enlarge on the statement of principles and reconcile the different perspectives set out in the Standards proper. Cross-references [in square brackets] point the reader to other sections where the subject has implications.

Sources of advice and help

This part includes specific references to a first-stop address or an authoritative publication. These are selective, but include some references to practice in countries other than the UK, and from the USA in particular.

The Standards are concerned with what action needs to be taken and, to a limited extent, with why that action is necessary. How to carry out the action is a much larger task than can be attempted here. In general, advice and information on how to achieve these standards will be available in the Touring Exhibitions Group's forthcoming *Manual of Touring Exhibitions*, which is designed to complement these Standards and which will be published by Butterworth-Heinemann in 1995. The Touring Exhibitions Group is a membership body affiliated to the Museums Association. It aims to improve the status, provision and standards of touring exhibitions, by campaigning and lobbying and by publishing and improving the exchange of information about exhibitions.

DEFINITIONS

Artist	means living practitioners and subsumes craftspeople and other people who consider themselves as 'exhibitors' with a close interest in the way that the objects they have made are displayed and interpreted. The artist is considered largely as a lender [24], rather than an organiser of exhibitions (which is covered by Debbie Duffin, <i>Organising Your Exhibition, The Self-Help Guide</i> , 1992, AN Publications, Artic Producers Publishing Co Ltd, PO Box 23, Sunderland, SR4 6DG).
Exhibit	means the individual items which comprise the exhibition (and not the whole exhibition, as in American usage); it distinguishes the artefact or specimen from the display and packaging materials and equipment, which are also integral parts of an exhibition.
Lender	has been used mainly from the point of view of public collections, but should also be relevant in a wider sense by providing general guidance for commercial organisations and private individuals lending to exhibitions. Museums should be expected to meet the standards laid down for lenders, but other types of lender may also aspire to many of the procedures. A lender may not be the owner.
Organiser	has been used to indicate the institution responsible for any aspect of an exhibition outside its own place of showing. Where a tour is a collaboration, 'organiser' is used to signify the institution taking the lead or responsibility for a particular aspect of the exhibition. When dealing with a lender, the organiser is clearly a borrower, but this word has not been used to avoid confusion.
Touring	has been used, in preference to 'travelling' or 'circulating', to indicate exhibitions that are designed from the outset to be seen in premises other than the organiser's. The term 'touring' is intended to cover equally the major exhibition shared with perhaps one other place of showing, and the low-value exhibition which circulates to a large number of small venues.
Venue	has been used to denote the recipient who hosts an exhibition from another source; in a collaboration where work is shared, it means any partner not directly responsible for the area under consideration in that Standard.

Acknowledgements

To set out a consensus of current professional opinion of best practice in touring exhibitions, the Museums & Galleries Commission drew together a group of exhibition organisers, administrators and other experts. This publication would not have been possible without the experience, effort and time which the following contributed to the expert group's discussions and conclusions:

Expert Group	<p>Jane Bywaters, previously Science Museum, now Museum of London May Cassar, The Conservation Unit, Museums & Galleries Commission Caroline Collier, South East Arts Jenny Costigan, West Midlands Area Museums Service Stephen Douglass, previously Museums & Galleries Commission, now Hertfordshire Museums Philip Doughty, Ulster Museum Bryan Dovey, Museums & Galleries Commission Tim Egan, National Museum of Wales Rosemary Ewles, previously Museums & Galleries Commission, now National Heritage Memorial Fund Alice Grant, previously Museums Documentation Association, now Science Museum Deborah Haase, Glasgow Museums Rosalinda Hardiman, Portsmouth City Museums Robert Livingston, previously Scottish Arts Council, now Highlands and Islands Arts Graham Martin, Victoria & Albert Museum John Morris, Yorkshire & Humberside Museums Council Chris Newbery, Museums & Galleries Commission Nima Poovaya-Smith, Bradford Museums & Art Galleries Linda Theophilus, previously Crafts Council, now freelance</p>	
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Other individuals and organisations consulted	<p>Nick Arber James Ayres Jo Bailey Jon Benington Celine Blair Scot Blyth Susan Bourne Hilary Bracegirdle Ian Brown Tom Buckley James Bustard Peter Cannon-Brookes Rosemary Capper Giles Clarke Mark Cole John Cooper Peter Crowther Colin Dawes Jocelyn Dodd Robert Dufton John Edmondson Martin Elliott Katharine Eustace Michael Festenstein</p>	<p>Crafts Council The John Judkyn Memorial Hampshire Museums Service Cheltenham Art Gallery and Museum Glasgow Museums Momart plc Towneley Hall Art Gallery and Museums Victoria & Albert Museum Scottish Museums Federation South Bank Centre Northern Arts Board <i>Museum Management and Curatorship</i> Scottish Museums Council The Natural History Museum Buckinghamshire County Museum Booth Museum of Natural History Bristol Museums and Art Gallery Buckinghamshire County Museum Castle Museum Nottingham Association for Business Sponsorship of the Arts National Museums & Galleries on Merseyside South Eastern Museums Service Ashmolean Museum Oxford Exhibition Services</p>

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Emmeline Leary	Museums & Galleries Commission
Helen Lockett	South Bank Centre
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Alan Robinson	North West Museums Service
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Howard Smith	Manchester City Art Gallery
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Theo Sturge	Herbert Art Gallery and Museum
Mark Suggitt	Yorkshire & Humberside Museums Council
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1 Standards for exhibition policies

- 1.1 Every organiser and every venue should draw up, publish and regularly review an exhibition policy, which should consider the contribution made by touring exhibitions.

The organiser should:

- 1.2 have a policy which includes its reasons for touring;
- 1.3 relate this policy to its corporate or business plan;
- 1.4 consider the time and cost implications of this policy;
- 1.5 take account of the exhibition policies of venues.

The lender should:

- 1.6 take account of the organiser's exhibition policy when considering a loan.

The venue should:

- 1.7 have a policy which includes its reasons for hosting touring exhibitions;
- 1.8 relate this policy to its corporate or business plan;
- 1.9 consider the time and cost implications of this policy;
- 1.10 provide organisers of touring exhibitions with copies of its exhibition policy.

Guidelines and notes

- 1.11 An exhibition policy will be unique to each institution, and will reflect the aims and objectives set out in the corporate plan. It will help to set priorities and determine how resources should be apportioned. It should be sufficiently precise to allow evaluation, while flexible enough to allow for changing situations. Management should formally approve the policy and review it at least every five years.
- 1.12 The policy should be written to define and explain the character of a programme in a way which can be used to attract support from government departments, local authorities, funders and others. A copy of the policy should accompany applications, to set the context for the exhibition for which a loan or funding is requested [9]. A venue's policy should help to persuade an organiser of the value of showing the exhibition there.
- 1.13 The policy should define the issues and themes which the institution wishes to pursue in its exhibition programme, and should account for the choice of types of, or subjects for, exhibitions. It should indicate any relationship between the exhibitions programme and the permanent displays or other aspects of the institution's work. It should refer to the policies of other institutions in the area, not only to avoid unnecessary duplication and waste of resources, but also to point to frameworks for collaboration. It should include statements on equal opportunities, disability and cultural identity, and should define its attitude to groups within the community and to living artists [11, 13, 24].
- 1.14 The policy should be available to visitors, to explain why they see what they see [23]. Subjects and themes can be identified or tested by market research, in order to reflect the needs, preferences, characteristics and behaviour of actual and potential visitors [2]. This information should be used in revising policy and in planning future programmes.
- 1.15 The policy should reflect, and help to widen, the expert knowledge and experience of the curators, designers and education staff in the institution [4]. Feedback should be encouraged from other staff

who should be kept informed about changes of policy. The policy should also reflect the limitations imposed by staffing, funding and the facilities available, and may indicate the extent of dependence on sponsorship or income from admission charges.

- 1.16 An institution which intends to attract or tour major exhibitions should have a full-time exhibition specialist or should formally allocate the time of a member of staff to this task. Smaller institutions without a specialist should seek external advice on running a programme. Institutions without exhibitions staff should give careful consideration to the effort and expense which they should devote to incoming exhibitions. Ambitions may have to be modified or certain exhibitions excluded, though not without pointing out missed opportunities which the governing body may be minded to grasp in future.
- 1.17 An exhibition policy should refer to the balance of exhibitions generated in-house and those which are bought in from outside. Every institution intending to tour should define its reasons for touring, in relation to the resources (staff, time, equipment and money) needed, and the effect on other work in the institution.

Sources of advice and help

- Suggitt, M., 'Temporary Exhibitions' in Ambrose, Timothy and Runyard, Sue, (eds), *Forward Planning*, 1991, Museums & Galleries Commission and Routledge, London.
- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.

2 Standards for market research

- 2.1 Market research should be undertaken to identify the exhibitions that an identified sector of visitors, actual or potential, would like to see.

The organiser should:

- 2.2 improve its knowledge and understanding of its audience, actual and potential;
- 2.3 consider the needs, interests and concerns of its venues' audiences;
- 2.4 consider the needs, interests and perspectives of people of different ages and backgrounds;
- 2.5 provide adequate time, funding and administrative support for market research;
- 2.6 ensure that market research is carried out to professional standards;
- 2.7 identify a target audience for each exhibition proposal.

The venue should:

- 2.8 improve its knowledge and understanding of its audience, actual and potential;
- 2.9 consider the needs, interests and perspectives of people of different ages and backgrounds when hiring and using exhibitions;
- 2.10 provide adequate time, funding and administrative support for market research;
- 2.11 ensure that market research is carried out to professional standards;
- 2.12 make the results of market research available to the organiser;
- 2.13 identify a target audience for each exhibition.

Guidelines and notes

- 2.14 Market research establishes a dialogue with actual and potential visitors, in order to understand their needs, interests and concerns. Research should help to identify the exhibitions programme which these people would like to see as part of the institution's overall range of services. Evaluation assesses the actual effectiveness of individual exhibitions [5, 23].
- 2.15 An organiser should review the venues to which it regularly sends exhibitions, to ensure that they are attracting the visitors the organiser intends to reach. It should carry out research at regular intervals into the subjects, treatments and ancillary activities that are of most value to its regular and prospective venues.
- 2.16 The responses of exhibition visitors and of those who do not go to the exhibitions should help to determine the future policy and programme and the way that subjects will be interpreted [1, 11]. It should be used to set targets, to estimate income (whether from admission charges or sales) and to justify expenditure [8]. Information on the balance between a resident population and incoming visitors may affect publicity and influence opening days and times [13, 20]. The results of market research may also influence the future choice and design of specific exhibitions [3, 14]. Market research may be used to gauge the strength of a venue's identity, visitors' expectations from an ongoing programme and possibly even 'brand loyalty' to particular suppliers of exhibitions.
- 2.17 Methods and procedures should be appropriate to the aims of the market research, to the questions and issues raised, the audience(s) selected, and constraints of staff, funding and policy. Researchers should

respect the rights and privacy of all individuals, who should be informed of the purpose of the study and should be allowed to refuse to be interviewed.

- 2.18 The rationale and objectives of the research, the work to be carried out, the role of the individuals involved, the time and funds estimated for completing the work, and the rights, restrictions and conditions regarding the publication and dissemination of the study findings should all be agreed by the relevant parties before research begins. Sufficient time and funding should be set aside to ensure that market research is carried out to professional standards and produces valid results. Current ethics and standards for market research should be observed. If the findings are made available to other institutions, the strengths and limitations of the particular study, and the extent to which its findings can be generalised to apply to other locations, must be clear to recipients.

Sources of advice and help

- Bicknell, S. and Farmelo, G. (eds), *Museum Visitor Studies in the 90s*, 1993, Science Museum, London, provides an introduction to visitor studies, and quotes (pp.166-168) the 'Professional standards for the practice of visitor research and evaluation in museums', which were adopted in 1991 by CARE (the Committee on Audience Research and Evaluation of the American Association of Museums).
- Falk, J. H. and Dierking, L. D., *The museum experience*, 1992, Whalesback Books, Washington (DC).
- Korn, R. J., *Museum visitor evaluation: new tool for management*, 1987, American Association for State and Local History, Nashville (Tennessee).

3 Standards for exhibition concepts

- 3.1 A clear exhibition concept should be developed, as the first step towards translating a policy into a specific exhibition. It should set out why an exhibition is to be presented, for whom it is intended, and the means by which the exhibition will communicate or interpret its message or theme. It should be used to assess the feasibility of the exhibition and a tour and to attract interest from potential venues.

The organiser should:

- 3.2 set out the exhibition's aims and objectives in the context of the exhibitions policy;
- 3.3 nominate a person and set aside time and expenses to develop and refine the concept;
- 3.4 ensure that the concept is appropriate to the exhibition medium;
- 3.5 assess its feasibility as a touring exhibition;
- 3.6 test the concept with potential lenders;
- 3.7 test the concept with potential venues;
- 3.8 agree target audience(s) with venues;
- 3.9 involve venues in developing the concept where possible;
- 3.10 develop the concept on the basis of expert knowledge or scholarly research;
- 3.11 consider legal and ethical implications.

The lender should:

- 3.12 take account of the exhibition concept when deciding whether to lend;
- 3.13 be responsive to a concept outside the lender's own interests.

The venue should:

- 3.14 consider how far the concept relates to its exhibitions policy;
- 3.15 satisfy itself that the concept is founded on expert knowledge or scholarly research;
- 3.16 satisfy itself that the concept is appropriate to the exhibition medium;
- 3.17 consider legal and ethical implications;
- 3.18 assess the feasibility of a showing;
- 3.19 assign a person to liaise with the organiser;
- 3.20 make every effort to be involved in developing the concept;
- 3.21 agree target audience(s) with the organiser;
- 3.22 add or remove exhibits only with the agreement of the organiser.

Guidelines and notes

- 3.23 For any exhibition, the principal criterion must be that its message is expressed primarily through the exhibits. If expert knowledge is not immediately available, further research may be needed [4]. The concept should be assessed for the likely availability of loans from other institutions or from individual lenders [24].
- 3.24 The touring potential of every exhibition should be considered. To make its message and its contents available as widely as possible, an exhibition should be seen in as many venues as is consistent with the safety of the exhibits. The possibility of a tour should be considered early, preferably before the conceptual framework is finalised, and certainly before design work begins.
- 3.25 The concept should be explicit about the audiences for which the exhibition is designed, and potential venues should be chosen partly on the basis of their ability to reach these audiences [2]. The concept should help venues to appreciate the significance of the exhibition and the contribution it will make to implementing their own policies [10, 11].
- 3.26 The organiser should define whether the concept is appropriate as a package which circulates to a large number of venues, or whether a collaboration with fewer venues is desirable. Some exhibitions tour for several years, so bookings are often made after the concept has been finalised and the tour begun. Where earlier involvement is practicable, each venue should assign a member of staff to liaise with the organiser, to ensure that the exhibition reflects each venue's experience and priorities. Touring exhibitions work best where there is interaction between organiser and venues at a personal level. The shorter the tour and the more collaborative a project, the more time and expenses should be set aside for these contacts.
- 3.27 The concept should be assessed for the staff and material resources available in-house, the effect of a tour on other work in the institution, and the work that might have to be contracted out. The organiser should consider the timetable, what other commitments and priorities may conflict, or what seasonal factors or significant anniversaries might be exploited [7]. It should consider the budget available and what fund-raising may be necessary [8, 9]. It should anticipate requirements for conservation, security, access, equipment, etc [25, 34]. It should plan for interpretation and publicity and involve educational and marketing staff at the outset [11, 12, 20]. If an external curator is employed, the organiser should agree this person's role and responsibilities in relation to the aims and objectives of the exhibition and should set out a timetable, fee and expenses.
- 3.28 Organiser and venues should consider the likely public response to exhibitions that include human remains, objects of cultural or sacred significance, living animals or exhibits using imagery or dealing with subjects which might be considered controversial or offensive [13].
- 3.29 The organiser should indicate whether venues will be permitted to add to or remove from an exhibition which communicates its message with the appropriate number and correct balance of exhibits [10, 24].
- 3.30 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.
- As far as possible, exhibition organisers and venues should follow appropriate codes of conduct, notably the Museums Association's current 'Code of Conduct for Museum Professionals'.

- Organisers and venues should observe national laws, eg Section 4 'Defence of public good' of the Obscene Publications Act 1959 and international conventions, eg the UNESCO Convention 'On the means of prohibiting and preventing the illicit export and transfer of ownership of cultural property', 1970, and the Convention on International Trade in Endangered Species (CITES).

- Codes of conduct often relate to particular types of museum material (eg the Museum Ethnographers Group's 'Recommendations on Professional Guidelines concerning the Storage, Display, Interpretation and Return of Human Remains in Ethnographical Collections in United Kingdom Museums', May 1991).

4 Standards for research

4.1 Research should underpin the development of proposals for exhibitions.

The organiser should:

- 4.2 have a formal research policy;
- 4.3 allow sufficient time and budget for the cost of any necessary research;
- 4.4 request lenders to make available research on their loans;
- 4.5 provide lenders with the results of any research or other insights arising out of the exhibition.

The lender should:

- 4.6 make available to the organiser any information on the subject of the loan that may be relevant to the exhibition;
- 4.7 recognise the value of insights which an exhibition can bring;
- 4.8 add details of the exhibition to the exhibit's record.

The venue should:

- 4.9 contribute to any new insights into individual exhibits;
- 4.10 welcome research and contributions from visitors;
- 4.11 pass on to the organiser any insights or contributions.

Guidelines and notes

- 4.12 This section is concerned with the academic, scholarly or specialist basis of the exhibition, and not with research into its effectiveness with visitors [2]. The institution's overall policy should incorporate a statement on research, which should be realistic and relevant to the institutions's public role, its staff and resources and the needs of its exhibitions. Time and expenses should be allocated for travel and materials for research purposes.
- 4.13 An institution's research policy should control as well as encourage personal initiative and enthusiasm, both inside and outside the institution. An exhibition can provide an opportunity for a curator to undertake research or to commission such work from scholars or other experts. The effect of researching an exhibition on other work in the institution should be gauged, and external experts commissioned where necessary [8]. A research brief should set out the objectives of the research, a realistic timetable, expenses and the form of any final report.
- 4.14 There should be a mutually-supportive relationship between research and exhibitions. Gaps in information on particular objects in a collection can lead to research, and an exhibition may then bring together isolated objects that have been compared with similar material elsewhere (and a tour may be arranged to lenders or other centres with similar material). Conversely, market research might identify exhibition proposals, which will require research to ensure that exhibits are chosen on the basis of sound knowledge [3].
- 4.15 Research should include visits to potential lenders and personal inspection of possible exhibits [24]. Very often the same exhibits are repeatedly requested from the permanent displays or published catalogues of major collections, while equally suitable items lie neglected because they are not on view

or have not been published. Where possible, research visits should take photographs for reference and record purposes and the condition of potential loans and the likely cost of collecting and returning the exhibit should be assessed.

- 4.16 Research will ensure that the content of graphics and written or spoken text is factually correct, but any text should be given to an experienced copy writer in order to communicate the expert's knowledge and enthusiasm to the target audience [11].
- 4.17 Through a loan to an exhibition, a lender may be given new insights which may be outside its knowledge or specialism but which may enlarge the totality of knowledge about the exhibit [24]. Museums normally maintain a body of current research on each item in their collections, and details of the exhibition, and any publications which included the object, should be added to the object's history file [6].
- 4.18 One of the functions of museum publishing is to share information between public collections, enlarging knowledge about objects through new research or different perspectives. A published catalogue is often the only permanent record of a temporary exhibition, so it has immense value to scholarship as a transmitter of research. In addition, publications make this information available to a wider public because they have a life after the exhibition itself and have a wider distribution than the tour [21].
- 4.19 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Fenton, A., 'Collections research: local, national and international perspectives' and subsequent essays in Thompson, J. M. A., (ed), *Manual of Curatorship*, 1992 (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.
- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.
- Help may be available from the staff at the relevant national museums and from the appropriate specialist group.

5 Standards for formative evaluation

- 5.1 Formative evaluation should be undertaken to enable organiser and venues to gauge the likely visitor response to the subject of the exhibition. It also enables them to test the methods of interpretation and if necessary to adapt the exhibition during development.

The organiser should:

- 5.2 use the aims and objectives of the exhibition as the starting point for formative evaluation;
- 5.3 agree with the venues a method to test the concept and its interpretation;
- 5.4 agree with the venues a method to test publicity;
- 5.5 plan for the time and cost of evaluation, including any subsequent changes to the exhibition;
- 5.6 assess findings, inform venues and make any necessary additions and changes to the exhibition.

The venue should:

- 5.7 inform the organiser of its experience of formative evaluation;
- 5.8 agree with the organiser a method of formative evaluation;
- 5.9 plan for the time and cost of evaluation;
- 5.10 follow the agreed procedure to test the concept and its interpretation;
- 5.11 follow the agreed procedure to test publicity;
- 5.12 inform the organiser of findings.

Guidelines and notes

- 5.13 Organiser and venues will have undertaken market research to identify and anticipate the needs of the community (or groups within it) for a service which is compatible with the aims of the organisation [1, 2]. Formative evaluation (also known as pre-evaluation or 'front-end' evaluation) enables them to assess how far an exhibition will satisfy the needs of their communities, or groups within these communities, and also demonstrates that they are responding to their markets. Summative evaluation tests the effectiveness of the resulting exhibition [23].
- 5.14 Formative evaluation is carried out when the exhibition is being developed, usually at the organiser's premises. It might be carried out at one of the venues if the organiser does not have a suitable exhibition space, if the exhibition is designed to be radically different in one or more venues, or if the venue has particular experience of, or interest in, formative evaluation. As a collaboration between organisers and venues before the exhibition has been finalised, it helps to define more clearly their intentions with the exhibition they are sharing, enabling them to see if the exhibition will be compatible with their different aims and interests. Although evaluation is expensive, a tour enables costs to be shared between all the venues.
- 5.15 Time and funds should be available to prepare mock-ups, in order to test subject and interpretation, and to act upon the findings by making any necessary alterations to the exhibition [11, 14]. The organiser should inform all venues of the findings and any changes made as a consequence. Evaluation should

gauge how far the exhibition will attract a particular target audience; it will help to define the publicity to be used, and might itself contribute to public anticipation [20].

Sources of advice and help

- Bicknell, S. and Farmelo, G., (eds), *Museum Visitor Studies in the 90s*, 1993, Science Museum, London.
- Griggs, S., 'Evaluating Museum Displays', 1985, *CAMC Factsheet*, Committee of Area Museum Councils, (available from individual Area Museum Councils).
- Miles, R., *The Design of Educational Exhibits*, 1988, Unwin Hyman, London.
- Taylor, S. (ed), *Try it! Improving exhibits through formative evaluation*, 1992, Association of Science and Technology Centres, Washington (DC).
- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.

6 Standards for documentation

- 6.1 Documentation provides a continuous record of the status of the organisation and administration of the tour, including the movement and condition of every exhibit, keeping organiser, lenders, carriers and venues informed as necessary.

The organiser should record:

- 6.2 a provisional list of exhibits and of informal contacts with potential lenders;
- 6.3 formal requests for loans;
- 6.4 unsuccessful applications;
- 6.5 successful applications;
- 6.6 descriptions of exhibits;
- 6.7 valuations, insurance or indemnity cover, and notification of this cover to the lender;
- 6.8 any additional information requested from the lender;
- 6.9 copies of any necessary certificates and licences;
- 6.10 instructions to the carrier for collection and return;
- 6.11 entry and exit of each loan;
- 6.12 contacts with potential venues;
- 6.13 agreements with each venue;
- 6.14 a tour inventory;
- 6.15 a transport manifest;
- 6.16 instructions to the carrier for each move of the tour;
- 6.17 receipts for each delivery and collection;
- 6.18 the location and condition of exhibits;
- 6.19 the conditions in which exhibits are displayed or stored.

The lender should record:

- 6.20 loan applications refused, with reasons;
- 6.21 loan applications agreed, with conditions;
- 6.22 the condition of the exhibit with requests for conservation and preparation for loan;
- 6.23 all export licenses requested by or on behalf of the lender
- 6.24 instructions for handling, movement and display;
- 6.25 information to the organiser or a carrier to transport the exhibit;

- 6.26 departure of the exhibit;
- 6.27 location and status of the exhibit throughout the tour;
- 6.28 the conditions in which it is shown;
- 6.29 return of the exhibit;
- 6.30 condition of the exhibit and requests for any conservation work;
- 6.31 its location after return;
- 6.32 details of the exhibition and any publication mentioning the exhibit.

The venue should record:

- 6.33 the contents of any facilities report;
- 6.34 its formal agreement to loan conditions;
- 6.35 receipts for delivery and collection of the exhibition;
- 6.36 packing methods;
- 6.37 location of exhibits;
- 6.38 condition of exhibits;
- 6.39 condition of display and packing materials;
- 6.40 the environments in which exhibits are displayed or stored.

Guidelines and notes

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- 6.41 Documentation encompasses many of the tasks covered elsewhere in this book, so this section is a recapitulation and a checklist. It should be read in combination with SPECTRUM: The UK Museum Documentation Standard, and with the section of the booklets in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*. Hire agreements, condition checks and any other documentation used by more than one party are dealt with separately, as is financial information [8, 10, 29].
 - 6.42 A regular lender should keep records of the institutions to which it has lent, with any conditions it attached to any loan and an assessment of how well these conditions were met [24]. It should also record all refusals to lend, with the reasons given. Arranged by the name of institution should be: all loan requests; any facilities reports; the governing body's decisions on whether or not to lend; signed agreements and correspondence concerning loan conditions, any additional requirements, estimated costs and any changes, eg extensions to the loan. Regular lenders should be able to extract data which will aid planning and keep senior management and/or governing bodies informed.
 - 6.43 The lender's documentation should include: an assessment of the condition of the exhibit; a request for conservation and preparation for loan; a conservator's record of remedial treatment and framing, crating and other preventive measures, a condition check before the departure of the exhibit, and requirements for handling, movement, display and environmental control [25-31, 34-35].
 - 6.44 A regular lender should record its instructions to the organiser or to a carrier for collecting and returning the exhibit. It should retain the signed receipt from the carrier, and update its entry and exit records with a note of the destination. During the tour, its location records should be updated as the

exhibit is transferred from venue to venue. It should also update its records on the condition of the work on the basis of condition checks and reports from couriers and/or the organiser [32, 33].

- 6.45 At the end of the tour, the lender should sign a receipt acknowledging the safe return of the exhibit. It should check the condition of the exhibit, arrange any conservation work, update its condition report and location, and formally close the loan. The exhibit's record should then be updated with details of the exhibition and any publication in which the exhibit was mentioned [4].
- 6.46 The organiser should record the process of selecting and requesting loans, so that it has a clear sense of how the exhibition is taking shape [3, 4]. It should record when it makes any formal request for loans, so that it can follow up any delays. It should note the reasons given for all unsuccessful requests, so that corrective action can be taken immediately or can be planned for the future [24].
- 6.47 The organiser should use a loans inventory to log loan agreements and to record the entry and exit of the exhibits [24, 29]. The inventory should include: a description of each exhibit, its dimensions and weight, and its condition; any special handling, lighting, etc which the lender requires and which may need to be communicated to the venues [15, 16, 28]; information about narrow roads, awkward flight of stairs and other difficulties of access to the exhibit which will need to be passed to the carrier [4]; a valuation agreed with each lender, insurance or indemnity cover for each exhibit, and notification of this cover to the lender [26]; any additional information about the exhibits requested from their lenders, eg certificates of fumigation [36]; and other certificates, eg licences for working objects or firearms.
- 6.48 The organiser should record all its contacts with potential venues, its agreements with finalised showings and its advice to venues unable to take the exhibition [10].
- 6.49 The organiser's documentation for the movement of individual exhibits and for the exhibition as a whole should include instructions to the carrier for collection and return, including contact names and addresses and expected arrival times, confirmed by a signed receipt for each delivery or collection. Where appropriate, it may also include details of any difficulties of access to premises and the agent's confirmation of customs clearance and CITES documents [32].
- 6.50 The organiser should label each exhibit with the tour inventory or exhibition catalogue number (and perhaps the section of the exhibition to which it belongs). A short description or visual tag might also be added to the tour inventory to help venues to identify an exhibit. Any label that a lender has attached to an exhibit and which bears its current accession or catalogue number, and any previous marking which is part of the exhibit's documentation, should not be removed from the exhibit or be covered in any way by the label relating to the exhibition.
- 6.51 The organiser should draw up a tour inventory listing all exhibits, display furniture and packing materials to be checked before and after each move. The inventory should be updated with any changes in the composition of the exhibition during the tour. It should be cross-referenced with the transport manifest, a list of crates, boxes and other packing, so that contents can be identified without unpacking [28, 30]. The venue should sign a receipt, which the organiser should retain as a record of the arrival of the material listed in this inventory. At the end of its showing, the venue should retain a receipt signed by the carrier when the exhibition is collected.
- 6.52 Each venue should record its formal agreement to the loan conditions set by organiser and lender(s) [10, 24], and the transport schedules and agreed delivery and collection times [32]. It should prepare an entry and exit record for incoming exhibits ordered by the tour inventory number, in order to log location whilst at the venue [28, 39], and should retain receipts for the delivery and collection of the exhibition [32]. It should record: the packing methods used for each exhibit, to aid repacking at the end of the showing [30]; the condition of every exhibit at entry and exit and at other specified times [29]; the condition of frames, display cases and all display and packing materials [16, 17, 30]; and the environment in which the exhibition is stored or displayed [31, 35].
- 6.53 All documentaion should comply with the standards set out in *SPECTRUM, The UK Museum Documentation Standard*, 1994, The Museum Documentation Association, Cambridge.

Sources of advice and help

- The Museum Documentation Association (Lincoln House, 347 Cherry Hinton Road, Cambridge, CB1 4DH) determines standards for museum documentation, publishes appropriate guidance, record cards and computer programs, and offers general advice on all aspects of documentation.
- Holm, Stuart A., *Facts & Artefacts: How to Document a Museum Collection*, 1991, Museum Documentation Association, Cambridge.
- Museums in Scotland may also obtain advice from the Scottish Museums Documentation Unit of the National Museums of Scotland.

7 Standards for schedules

- 7.1 Every exhibition should have a detailed and realistic schedule which takes account of the notice required by lenders or funders as well as each venue's timetable for its showing.

The organiser should:

- 7.2 plan for sufficient time to be given to each aspect of the organisation of the exhibition;
- 7.3 take into account the notice required by other parties;
- 7.4 arrange tasks into a timetable which is realistic both for its own staff and for external contractors;
- 7.5 appoint or nominate a project manager;
- 7.6 monitor progress against the schedule;
- 7.7 take appropriate action where there are significant delays;
- 7.8 advise venues of the schedule;
- 7.9 help venues to complete as many of their preparations as possible before the delivery of the exhibition.

The lender should:

- 7.10 inform the organiser of the notice required for loan applications;
- 7.11 process loan requests as expeditiously as possible;
- 7.12 arrange conservation or photography to meet the organiser's deadlines;
- 7.13 set aside time for a courier to be available, if appropriate, at the required moments in the tour.

The venue should:

- 7.14 plan time for each task, taking into account the organiser's timetable and applications for funding or indemnity;
- 7.15 arrange tasks into a timetable which is realistic both for its own staff and for any external contractors;
- 7.16 appoint or nominate a project manager;
- 7.17 plan to complete as much preparation as possible before the arrival of the exhibition;
- 7.18 plan to complete all other arrangements before the opening of the exhibition;
- 7.19 propose changes to the organiser's schedule to help 7.16 and 7.17;
- 7.20 plan arrangements for the removal of the exhibition;
- 7.21 monitor progress against the schedule;
- 7.22 take appropriate action where there are significant delays.

- 7.23 As part of an overall timetable for a programme, the organiser should prepare a detailed schedule for each exhibition from the concept stage onwards [3]. The schedule should list in a logical order all the tasks and procedures to be carried out, the people responsible, and realistic deadlines when work should be completed. It should allow some extra time to accommodate unanticipated delays, but should define the critical 'milestones' at which the exhibition will need to be cancelled if funding, loans or bookings are not achieved.
- 7.24 Adequate time should be allowed for research, conservation, requesting loans, fundraising, negotiating bookings, arranging insurance or indemnity and any other activity which requires an extensive lead-time or has fixed deadlines [4, 9, 10, 24-26]. It should be possible to demonstrate the status of the exhibition at any time. Necessary preliminary work should be completed before the next steps are carried out, eg exhibits should be selected and loans agreed before transport arrangements are made.
- 7.25 The organiser should nominate or employ a project manager to manage and coordinate all the resources needed for the exhibition. This person should monitor the timing of the contributions and requirements from the individuals concerned in the project, internal and external. The project manager should ensure that key work is completed within the agreed time, and should revise the schedule where necessary, consulting with relevant members of staff and other people contributing to the exhibition, and seeking the necessary approvals from management. The project manager may also be responsible for monitoring the budget [8]. Where possible, the project manager should visit the venues.
- 7.26 Each venue should also prepare a realistic schedule for its own showing and nominate a member of staff to act as its project manager [10]. This person should reconcile the organiser's schedule with the venue's needs, but should propose modifications where necessary. Where possible, the project manager should see the exhibition at a previous showing. For the venue, a major deadline will be the arrival of publicity, educational and other materials which will help it to prepare its visitors [12, 20]. Other major deadlines will be the date of delivery of the exhibition, by which time all work that can be done before the exhibits arrive is completed, and the date of collection, which is crucial for ensuring that the next showing happens on time [32].

Sources of advice and help

- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.

8 Standards for budgets

- 8.1 Every exhibition should have its own budget with estimates arranged under the main headings of expenditure and income. The budget enables the exhibition's feasibility to be tested and its scope to be agreed at the outset. It also enables actual expenditure and income to be monitored and controlled.

The organiser should:

- 8.2 nominate a member of staff to set up and monitor the budget;
- 8.3 estimate expenditure or income for each aspect of the exhibition and its tour;
- 8.4 arrange these estimates into a formal budget;
- 8.5 assess the feasibility of the exhibition in terms of the actual and potential financial resources;
- 8.6 agree any necessary adjustments to the scope of the exhibition;
- 8.7 review and adjust the budget throughout the life of the exhibition;
- 8.8 control actual expenditure and income against budget;
- 8.9 make this budget available to the venues, if appropriate;
- 8.10 ensure that the final account shows the cost, making clear any staff or volunteer time, or any grant-aid or subsidy involved.

The lender should:

- 8.11 assess costs when agreeing a loan;
- 8.12 advise the organiser of any costs to be charged to the exhibition budget.

The venue should:

- 8.13 nominate a member of staff to liaise with the organiser on the financial arrangements;
- 8.14 estimate expenditure or income for each aspect of the showing;
- 8.15 arrange these estimates into a formal budget for the showing;
- 8.16 assess the feasibility of the showing in terms of the actual and potential financial resources, and agree its scope;
- 8.17 review and adjust this budget as necessary;
- 8.18 control actual expenditure and income against budget;
- 8.19 make this budget available to the organiser, if requested;
- 8.20 ensure that the final account shows the cost, making clear any staff or volunteer time, or any grant-aid or subsidy involved.

Guidelines and notes

- 8.21 A budget, summarising anticipated expenditure and income arranged under headings and sub-headings, should be used to estimate the net cost of the exhibition. Expenditure will be affected by lenders' requirements, eg the organiser may be required to pay for the costs of conservation, photography, packing, transport or couriers [25, 27, 30, 32, 33]. The budget should also set targets for generating income, and may be used as part of a fund-raising document [9].
- 8.22 Financial viability will affect the feasibility of the exhibition [3]. Market research should help to estimate attendances and to estimate income from admission charges or sales [2]. Viability may depend on the tour, from hiring fees paid by the venues or other income earned on tour, and from grants and sponsorship attracted by increased visibility [9, 10]. The feasibility stage may justify devoting an increased proportion of a programme budget to the exhibition, on the basis of reciprocal arrangements with other organisers, higher public profile and other less quantifiable benefits of touring.
- 8.23 Subsequently, the budget will provide a means of controlling the finances of the exhibition on a day-to-day basis. It should be possible to demonstrate the financial status of the exhibition, including all commitments, at any time. A member of staff, who may also be the project manager [7], should be nominated to set up and monitor the budget and to seek approval for any adjustments. The budget will determine choices, eg on design [14], the number of exhibits (and where they come from) [24] and size of publication [21]. Those responsible for specific parts of the exhibition, whether in-house staff or external contractors, should be required to report actual spending to the budget-holder.
- 8.24 If possible, each exhibition should be treated as a separate cost centre, including staff-time and running costs. This method may be useful where spending is spread over two or more financial years because of the cost of the project, its long lead-time and/or its extensive tour. It will also help to plan and control the time which the organiser's staff devote to researching, designing and building the exhibition and then to managing its tour [4, 14]. The effect of the tour on other work in the institution can be more reliably estimated, more objective decisions can be made on what work can be contracted out, and more realistic costs can be presented to potential funders.
- 8.25 Touring exhibitions are sometimes made available on a subsidised basis, or accompanied by grant-aid. In these cases, organiser, lender and venues should all ensure that the exhibitions budget and final account make these arrangements explicit. Similarly, organiser, lender and venues should ensure that the exhibition's final account makes clear all the time devoted by staff and volunteers to the exhibition. This transparency will contribute to the future health of touring exhibitions.
- 8.26 The venue should assess the feasibility of its showing in terms of the funding actually and potentially available. It should assign a member of staff to prepare a budget and to monitor and control spending. The venue should be aware of the organiser's overall budget, to give it a sense of the significance of the exhibition and a basis for allocating resources to its own showing. Some of the organiser's costs on promotional and educational activities will apply only to its own showing, and each venue should make its own decision about the resources it will devote to exploiting its showing [10].

Sources of advice and help

- Touring Exhibitions Group, *Manual of Touring Exhibitions*, (forthcoming), Butterworth-Heinemann, Oxford.

9 Standards for fundraising

- 9.1 Efforts should be coordinated where organiser and venues are both seeking funds. A funder should not influence selection or editorial content. Terms should be clear and agreed in writing, and acknowledgements should be in proportion to the support offered.

The organiser should:

- 9.2 assess whether the tour would be attractive to funders;
- 9.3 devise a strategy for fundraising;
- 9.4 allow for the time and cost of fundraising;
- 9.5 contact potential funders as early as possible;
- 9.6 assess the financial health of potential funders;
- 9.7 set out the benefits the tour can offer the funders;
- 9.8 agree benefits with the funders in writing;
- 9.9 agree the wording of acknowledgements with the funders in writing;
- 9.10 agree the timing of payments with the funders in writing;
- 9.11 keep the funders informed on progress with the project;
- 9.12 advise lenders about funders;
- 9.13 inform venues of any requirements or restrictions imposed by the funders;
- 9.14 ensure that funders get as much good publicity as possible;
- 9.15 supply each funder with a copy of any final report.

The lender should:

- 9.16 advise the organiser of any objections to any of the funders.

The venue should:

- 9.17 support the organiser's agreements and arrangements with its funders, wherever possible;
- 9.18 assess whether the showing would be attractive to external funding;
- 9.19 inform the organiser where local funding is sought;
- 9.20 contact potential funders as soon as possible;
- 9.21 set out the benefits the showing can offer local funders;
- 9.22 agree benefits with each local funder;
- 9.23 agree acknowledgements with organiser and each local funder;
- 9.24 agree with each local funder in writing the timing of payments;

- 9.25 keep local funders informed about the showing;
- 9.26 ensure that local funders get as much good publicity as possible;
- 9.27 supply local funders with a copy of any final report.

Guidelines and notes

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- 9.28 Fundraising refers to any income sought from organisations outside the organiser or the venues. Grant-aid may be raised from public bodies and sponsorship from commercial organisations. A funder might underwrite all or part of the costs. It might supply goods or services in kind or at a discount or arrange media coverage of the exhibition. Even when money is not required, the influence and promotional expertise of an external organisation may be of value.
 - 9.29 Any necessary fundraising should be begun as soon as concept, budget and tour have been agreed in outline [3, 8, 10]. In order to make an impact on the exhibition, funding must be obtained early on, and grant and sponsorship budgets are often allocated as much as a year in advance. Organiser (and venues, where appropriate) should agree a strategy to research, identify and contact potential funders. The strategy should set a deadline, at which the exhibition will be cancelled if funding is not available [7]. It should also define how much time and expenses are to be invested in fundraising.
 - 9.30 The fundraising strategy should also define how much support is to be requested. The starting point may be the deficit in the budget that must be covered before the exhibition can be organised, but the value of the benefits which the exhibition will bring to a funder, which might be greater or less than the sum actually needed, should also be considered.
 - 9.31 An exhibition budget may include activities and events specifically geared towards potential funders, but fundraising will only be worthwhile if there is a benefit for the exhibition and its public beyond these activities and events. A funder should be expected to provide additional funding if it lays down conditions that involve further costs.
 - 9.32 Where fundraising is undertaken in the private sector, organiser, lenders and venues should advise each other of their policies on commercial sponsorship. Such policies often reflect the attitudes of their respective governing bodies, and might list tobacco houses, companies trading in sensitive areas of the world or other organisations from which they would not accept funding.
 - 9.33 Organiser and venues should liaise on their respective approaches for funding, to ensure that a venue's success with raising funds locally does not conflict with any funding negotiated by the organiser for the whole tour. The organiser should also make available on request the basic information that a venue can adapt in order to attract support from local funders.
 - 9.34 All applications should consider the project from the funders' point of view, taking into account whether funding is available from social funds or from a marketing budget. In the latter case, an application should consider how image-conscious the company is, what its marketing style is, and whether the exhibition will attract its target audience or provide the promotional opportunities it may be seeking.
 - 9.35 A contract should set out in writing each party's viewpoint, intentions and expectations. Ground-rules should be detailed and clear. The organiser or venue should set out a realistic plan and timetable. Possible areas of disagreement should be identified and resolved. A cancellation clause and termination date should be included, in case not all the funding is in place in time [7].
 - 9.36 The agreement should spell out financial arrangements and the extent or duration of the support offered. A timetable of payment should be agreed. Whatever amounts are not paid at once should be index-linked, as their value can fall over the period of preparing and touring the exhibition.
 - 9.37 The recipient of funding should nominate a member of staff to maintain a good working partnership with the funder on a day-to-day basis. This person should ensure that the funder feels involved without

disrupting the project. Agreements should be carried out, and funders' requirements met. Every opportunity should be taken to publicise a funder, which is good public relations as well as an investment for the future. A funder should be invited to previews and other events, and should be sent brief reports, visitor figures and press cuttings (if appropriate) after each showing. At the end of the tour, the organiser should send funders a copy of the evaluation of the tour, so that they have an account of the effectiveness of their help [23].

- 9.38 Responsibility for concept, editorial content and the safety of the exhibits should rest with the organiser and the venues [3]. A commercial sponsor should only influence the selection or editorial content of an exhibition via a selection committee or steering group. Funders should not undermine the educational content of a touring exhibition [12].
- 9.39 Credits should be in proper proportion to the support offered vis-à-vis contributions from other sources. Publicity on posters and leaflets are often one of the key benefits an organiser can offer, but such credits should not conflict with the essential purpose of the publicity to promote the exhibition [20]. Full acknowledgements should appear at the beginning and end of the exhibition, and may describe in a straightforward and factual manner any of the funder's products, activities or special interests which are relevant to the exhibition. Where goods or services are supplied in kind or at discount, this sponsorship can be acknowledged in a similar way, but the goods supplied should be given no undue emphasis within the exhibition itself.

Sources of advice and help

- Willis Taylor, Russell, Fundraising for Museums and the Arts, Museums and Galleries Commission.
- Broadbent, A. (ed), *The Regional Arts Funding Handbook*, published annually with a mid-term supplement, available from 2 Hoxton Street, London, N1 6NG.
- Farnell, G. and Heath, M., *The Handbook of Grants: A Guide to sources of public funding for museums, galleries, heritage and visual arts organisations*, 1993, Museum Development Company, Milton Keynes.
- Villemur A. (ed), *Directory of Grant-Making Trusts*, 1993 (latest edition), Charities Aid Foundation, Tonbridge.
- The Association for Business Sponsorship of the Arts (Head Office: Nutmeg House, 60 Gainsford Street, Butlers Wharf, London, SE1 2NT, Tel 071 378 8143) is the national, independent charity which exists to promote partnerships between arts organisations (including museums) and industry. ABSA provides advice and training on business sponsorship and publishes a variety of guides including:
 - ABSA/W H Smith Sponsorship Manual*
 - Arthur Andersen Business Support of the Arts: a Tax Guide*
 - ABSA Code of Good Practice in Sponsorship*
- Some Area Museum Councils are able to provide advice on, and help with, fundraising.

10 Standards for hire agreements

- 10.1 There should be a written agreement which sets out the administrative and financial obligations of organiser and venue, to safeguard each party's interests and to protect the exhibition itself.

The organiser should:

- 10.2 outline title, theme and contents;
- 10.3 specify the space required;
- 10.4 specify the services required;
- 10.5 specify security requirements;
- 10.6 specify environmental conditions;
- 10.7 indicate the maximum showing period;
- 10.8 outline the transport schedule;
- 10.9 outline access requirements;
- 10.10 specify insurance or indemnity arrangements or requirements;
- 10.11 outline any arrangements for couriers;
- 10.12 specify handling and installation arrangements;
- 10.13 specify storage requirements;
- 10.14 specify maintenance requirements;
- 10.15 specify hire fee, other charges and any penalties;
- 10.16 specify materials provided within the hire fee;
- 10.17 describe optional materials and activities;
- 10.18 specify the use of publicity materials;
- 10.19 specify restrictions on photography and filming;
- 10.20 outline publication plans;
- 10.21 specify any acknowledgements;
- 10.22 agree any admission charges;
- 10.23 specify any obligations to funders;
- 10.24 estimate a date for dispatch of advance information;
- 10.25 outline arrangements for liaison with the venue;
- 10.26 specify what is required as feedback from the venues.

The venue should agree:

- 10.27 the showing period;
- 10.28 arrangements for delivery and collection of the exhibition;
- 10.29 to arrange insurance or indemnity, as required;
- 10.30 access requirements;
- 10.31 handling and installation arrangements;
- 10.32 to provide the space required;
- 10.33 to provide services and equipment, as required;
- 10.34 to provide security, as required;
- 10.35 to provide environmental control, as required;
- 10.36 to provide maintenance, as required;
- 10.37 to provide storage, as required;
- 10.38 to consult the organiser before adding or removing exhibits;
- 10.39 to make arrangements for couriers, as required;
- 10.40 hire fee, other charges and payment arrangements;
- 10.41 admission charges;
- 10.42 the publicity materials required;
- 10.43 the educational materials and activities it requires;
- 10.44 to restrict photography and filming, as required;
- 10.45 to acknowledge the organiser;
- 10.46 to abide by obligations to funders;
- 10.47 to consult the organiser before creating any additional materials;
- 10.48 arrangements for liaison with the organiser;
- 10.49 to provide feedback to the organiser;
- 10.50 to inform all relevant members of staff of the terms of the agreement.

Guidelines and notes

- 10.51 This section is concerned with a contract between organiser and each venue that summarizes current thinking about the exhibition, sets out the obligations of the two parties and outlines their financial responsibilities. Both parties should accept these terms in writing as soon as they are in an acceptable form, and any subsequent changes should be agreed in writing [6]. Adequate time should be allowed for finding venues and agreeing showings [7].

- 10.52 A successful showing will also depend on effective communication and interaction at a personal level, particularly where the exhibition is a collaboration. The agreement should nominate a person on each side for day-to-day contact. When appropriate, a nominee should visit the other party, to promote a smooth working relationship. The organiser should have direct experience of the venue's facilities and resources, and the venue should have the opportunity to familiarise itself with the exhibition before its arrival.
- 10.53 Before loans have been secured, the contents will be largely speculative, but intentions should be clearly stated [3]. Venues should be notified subsequently if the exhibition changes significantly. Venues should also be advised where a lender or those responsible for indemnity arrangements require changes in supervision or other protection which might have administrative or financial consequences [26].
- 10.54 Once the exhibition has taken shape, the organiser should specify if nothing should be added to an exhibition that communicates its message with the appropriate number and correct balance of exhibits [3]. Provided balance and appearance are maintained, the organiser should permit additions which enhance the incoming exhibits, highlight a local interest or event, expand upon a theme for which the venue's collection is suited, or cater for the special needs of the anticipated audience [14]. Organiser and venue should agree what the additions are intended to achieve, and should assess their effectiveness as part of the overall evaluation of the showing [23].
- 10.55 The organiser should also specify if venues should not remove anything from an exhibition. Removal can alter the balance of the exhibition [3]. It can also offend the lender, as well as irritate visitors if the withdrawn exhibit is listed in a catalogue [21, 24]. If removal is permitted, the exhibit should be stored in appropriate conditions [31].
- 10.56 The organiser should determine a consistent and reasonable fee structure, and advise each venue of discretionary and non-discretionary charges when offering a showing. Where possible, all materials and activities which are essential to the showing should be included within the fee. The venue must be informed about all costs that are not included. When booking a showing, a venue should confirm the fees and charges it has agreed to pay and should include these costs in the budget for its showing [8]. Penalty clauses should protect both parties against cancellation.
- 10.57 A venue should advise the organiser where it charges for admission to the building, and especially where it intends to make a special charge for admission to the exhibition. The organiser or one of its funders may take exception to charging on policy grounds, or may be concerned about its effects in terms of limiting the number or range of visitors [13]. In other cases, showings may be offered to venues where there is a record of energetic marketing, high attendances and significant income from admissions. The hire fee may be increased accordingly or the organiser may take a proportion of the ticket income.
- 10.58 The organiser should specify whether the period offered is the actual period of showing or whether it includes time for unpacking and installation and for dismantling and re-packing. The venue should base its schedule on this timetable [7]. The organiser should also specify transport arrangements, especially where the venue is responsible for arranging for onward transport to the next venue [32]. Where the venue is required to pay for onward transport, the organiser should indicate the length of the journey for which the venue will be responsible, and the likely cost.
- 10.59 Obligations must be agreed with respect to insuring or indemnifying the exhibition, both on its premises and in transit [26]. The organiser should also set out the venue's administrative obligations in relation to any couriers accompanying the exhibition [33].
- 10.60 Although the details of space required and the service needs (lighting, power, maintenance) may be imprecise at the early stages when bookings are normally made, details should be confirmed as soon as possible [15-18]. The organiser should set out who is responsible for installing and dismantling the exhibition, and what the venue's responsibilities are, even where this work is carried out by the organiser [28]. The venue should make arrangements to meet all requirements for space, services, security and environmental controls [34, 35]. It should indicate the requirements it can meet immediately and confirm when other requirements have been met.

- 10.61 The organiser should specify the type, quantity and authorised use of all publicity or educational material and publications [12, 20, 21]. The costs of quantities additional to any allowance provided within the hire fee should also be specified. The venue should consult the organiser before using any material for unauthorised purposes or before generating any additional or alternative material for its own use.
- 10.62 The organiser should agree with the venues how far the latter might raise funds without conflicting with its own approaches for funding for the whole tour. Organiser, lenders and venues should advise each other where they will not accept particular commercial sponsors [9].
- 10.63 The organiser should specify what sort of feedback it requires from venues, which might include details of press coverage, installation photographs, attendance figures, any visitor research and information that might be of use to subsequent showings [20]. Venues should be provided with a copy of the evaluation of the tour [23].

Sources of advice and help

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 - Chapter 12, 'Loan agreements and insurance' in Stolow, N., *Conservation and Exhibitions: Packing, transport, storage, and environmental considerations*, 1987, Butterworth & Co. London.
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11 Standards for interpretation

- 11.1** Interpretation involves the choice and implementation of appropriate methods to enhance the understanding and enjoyment of individual exhibits as well as to reinforce the message of the exhibition as a whole. It should be designed to be accessible to the target audience, bearing in mind the range of ages, abilities and backgrounds.

The organiser should:

- 11.2** plan interpretation from the concept stage, as an integral part of the exhibition;
- 11.3** consult the venues on their practice with regard to interpretation;
- 11.4** integrate design, graphics and text to enhance the understanding and enjoyment of individual exhibits;
- 11.5** integrate design, graphics and text to reinforce the exhibition's theme or message;
- 11.6** provide a system of interpretation which is consistent throughout the exhibition;
- 11.7** make exhibits and supporting interpretation as accessible and as easy to read as possible;
- 11.8** ensure that information is concise, informative and stimulating;
- 11.9** ensure that any factual information is accurate, noting where statements are hypothetical;
- 11.10** ensure that no part of the interpretation contains unintended prejudice;
- 11.11** adopt a legible style and size for written text;
- 11.12** provide interpretative material in more than one medium where possible;
- 11.13** provide interpretative material in more than one language where appropriate;
- 11.14** consider the use of interactive devices to illustrate the principles behind the exhibits.

The lender should:

- 11.15** ensure that any factual information on the exhibit is accurate and note where statements are hypothetical;
- 11.16** be sensitive to information on the exhibit which might imply prejudice;
- 11.17** agree the wording of its acknowledgement;
- 11.18** record any description or interpretation on the exhibit's primary record.

The venue should:

- 11.19** advise the organiser on its practice for interpretation;
- 11.20** agree with the organiser the main target groups for the exhibition's showing;
- 11.21** ensure that the style and content of interpretation is clear and comprehensible;
- 11.22** ensure that no part of the interpretative material contains unintended prejudice;

11.23 satisfy itself that interpretative material is factually accurate.

Guidelines and notes

- 11.24 This section relates to those general standards for interpretation which apply to aspects of design and lighting, educational materials, display furniture and live interpretation [12-18].
- 11.25 Interpretation should be considered at the exhibition concept stage [3]. It should give clarity and continuity, so that visitors move easily through the exhibition. It should stimulate visitors from the widest possible range of ages, abilities and backgrounds to look at the exhibits. Market research should influence the way that exhibitions are presented. Interpretation should be tested with target audiences [2, 5]. It should be at least to the same standards of design and interpretation as a venue's other displays. Its character should be distinct from the venue's house-style because visibility is important to the organiser and to funders. Venues can use incoming exhibitions to test different forms of interpretation.
- 11.26 Any expert researching or supervising the scholarly content of the exhibition should ensure that the content of graphics and written or spoken text is factually correct [4]. In the same way that maps, charts or diagrams are assigned to a designer, so text should be given to an experienced copy writer who has a clear sense of the target audience and who can communicate the scholar's knowledge and enthusiasm. If jargon cannot be eliminated, it should be defined in a way that makes it understandable and useful to the visitor, and opinion should be stated as such. Written or spoken text should be checked for anything that contains or implies gender, racial or disability bias, or could be otherwise controversial or offensive. Quotations from original recordings or texts should not be edited if the intention is to report or challenge such bias.
- 11.27 The size and location of graphic and text panels should not be obtrusive or interfere with the experience of the exhibits. Layout of graphic and text panels and labels should be clear, with legible typeface and size and adequate contrast. Labels should be concise but place the exhibit in the overall context of the exhibition. Text panels should be placed at a height suitable for younger visitors and those using wheelchairs [17]. Organiser, lenders, donors and funders may also be acknowledged on text panels and labels, as appropriate [9, 10, 24].
- 11.28 Where possible, verbal information should be available in another medium, eg braille and tape guides. Verbal information should also be available in other languages, to make the exhibition more accessible to visitors for whom English is not the first language. Venues should advise the organiser if their target audiences do not use English as a first language. Where the organiser does not itself provide information in other media or languages, it should provide the venue with a text in English in good time. If another venue uses this material subsequently (eg to assess if non-English or braille texts help it to reach a new audience), this should not imply that its other exhibitions are not intended for minority groups or foreign nationals.
- 11.29 Interactive devices that are used to enhance, enliven and interpret exhibits should be designed to: communicate their message effectively; be suitable for use by the full range of visitors likely to be encountered on a tour; meet current safety standards; be robust enough to withstand the rigours of the tour [18].

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- Royal Ontario Museum, *Communicating with the Museum Visitor*, 1976, Royal Ontario Museum, Toronto.
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12 Standards for educational materials and activities

- 12.1 The educational potential of a touring exhibition should be considered from the outset. The organiser should provide venues with guidance and information based on the research for the exhibition. Venues should develop activities and events suitable for adults as well as for children. If venues intend to attract school visits, the exhibition's relevance to the National Curriculum should be fully explored and exploited.

The organiser should:

- 12.2 include support for venues' educational activities in its education policy;
- 12.3 define specific educational aims for the exhibition;
- 12.4 consider educational activities at the concept stage;
- 12.5 take advice from or involve an education professional early in the project;
- 12.6 plan for the time and cost of developing educational activities;
- 12.7 obtain time and funding from the institution's education staff and budget, if appropriate;
- 12.8 involve venues early in the project;
- 12.9 consider with the venues all opportunities for enhancing the exhibition's theme or story;
- 12.10 consider with the venues all opportunities for cross-curricular activities relating to the exhibits;
- 12.11 consider with the venues all opportunities for leisure learning;
- 12.12 provide venues with support materials and guidance for making maximum educational benefit of their showings;
- 12.13 evaluate each venue's activities and pass on any advice to subsequent showings.

The venue should:

- 12.14 have an education policy which takes into account incoming exhibitions;
- 12.15 define specific educational aims for a showing, including appropriate target groups;
- 12.16 take advice from or involve an education professional in planning for the showing;
- 12.17 plan for the time and cost of developing and implementing educational activities;
- 12.18 negotiate time and funds from any separate education budget held by the venue;
- 12.19 in consultation with the organiser, devise events and materials for enhancing the exhibition's story or theme;
- 12.20 in consultation with the organiser, devise events and materials for cross-curricular activities based on the exhibits;
- 12.21 in consultation with the organiser, devise events and materials for leisure learning;
- 12.22 take advantage of the organiser's guidance and materials for making the best use of its showing;

12.23 implement and publicise events and activities;

12.24 evaluate these events and activities, and inform the organiser about conclusions.

Guidelines and notes

- 12.25 Every museum should have a policy on education as part of its overall approach to communication. Education programmes should be devised for adults as well as children, with opportunities for leisure learning for individuals and family groups. Programmes may include lectures, talks, guided tours, demonstrations, workshops, hands-on activities, schools packs and teacher's notes [19].
- 12.26 The educational potential of an exhibition should be explored at the earliest stage of planning [3]. Advice from an education officer will help in all aspects of the presentation of exhibits to the public, as well as the provision of specific support materials and activities.
- 12.27 Early consultation with venues on their policy and approach to educational activities will help to provide appropriate and useful materials to accompany the exhibition [10]. Background information and suggestions for approaches may be more helpful than fully-developed materials for direct use, where a venue has education expertise or specialist staff.
- 12.28 The educational programme of a touring exhibition should aim to reach audiences of ages, interests and capabilities identified by each venue, in the short period that the exhibition is showing there. Actual activities will vary according to each venue's budget, space and staff as well as the range of exhibitions and supporting materials available to it. Adequate publicity is essential, and organiser and venue alike should ensure that educational materials are made available as early as possible [20].
- 12.29 The National Curriculum emphasises the importance of direct experience and personal research in many subjects. A professional educator familiar with the requirements of the National Curriculum across a range of disciplines will be able to recommend a wide range of approaches to the subject matter of the exhibition.
- 12.30 Touring exhibitions provide venues with activities and events to engage the general public, using materials made possible by economies of scale, and making the experience and expertise in one showing available to other venues. The organiser should gather and circulate in good time information on potential workshop leaders, visiting artists or speakers and demonstrators to help venues develop a range of activities. Experience gained at one venue should be passed on to subsequent showings.
- 12.31 Potential funders may be interested in the educational potential of a touring exhibition. Negotiation may be necessary to ensure that the core educative principles guiding the exhibition are not compromised [9].

Sources of advice and help

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- Newbery, E., *Learning on Location*, 1993, Museum Development Company, Milton Keynes.

13 Standards for the care of visitors

- 13.1 Organiser and venues should minimise any physical, intellectual or cultural barriers which might inhibit a visit to an exhibition. Within the exhibition itself, they should make every effort to make visitors feel welcome, comfortable and able to approach the exhibits.

The organiser should:

- 13.2 consider venues and their visitors in any Customer Care policy;
- 13.3 plan for the time and cost of providing adequate care for visitors to the exhibition;
- 13.4 design the exhibition so that visitors are less likely to encounter physical, intellectual or cultural barriers;
- 13.5 comply with health and safety requirements;
- 13.6 consider the needs of people with disabilities in the design and layout of the exhibition;
- 13.7 satisfy itself that each venue's facilities are appropriate for visitors to experience the exhibition;
- 13.8 satisfy itself about each venue's standards of courtesy, cleanliness and maintenance;
- 13.9 indicate where restrictions might be necessary.

The venue should:

- 13.10 make available its Customer Care policy to the organiser, if requested;
- 13.11 plan for the time and cost of improving access to the exhibition, where possible;
- 13.12 consult the organiser at an early stage about admission charges;
- 13.13 advertise and display any charges for entry;
- 13.14 plan for the time and cost of providing adequate care for visitors;
- 13.15 advertise and explain any necessary restrictions;
- 13.16 arrange the layout and circulation of the exhibition to minimise physical, intellectual or cultural barriers;
- 13.17 provide a high standard of courtesy, cleanliness and maintenance;
- 13.18 provide seating, toilets, catering and other facilities, as appropriate;
- 13.19 provide public liability insurance and comply with all safety requirements.

Guidelines and notes

- 13.20 Access should be seen as wider than action by a venue to overcome any problems of physical access to the exhibition space. Organisers and venues should include in their exhibition policies a statement on equal opportunities, based on the principle that no venue or exhibition should discourage or inhibit access on the basis of age, creed, nationality, race, gender, sexual orientation, physical or mental ability, social and economic background or any other cause of discrimination [1]. A touring exhibition may provide opportunities for training staff and for testing and reviewing this policy.

- 13.21 At the concept and design stage, the organiser should consider the physical and intellectual factors, cultural issues and different language requirements to be encountered on the tour, and should ensure that exhibits are presented in a manner which is attractive, approachable and comprehensible [3, 11]. Specialist staff and appropriate outside organisations should be consulted on access for people with disabilities.
- 13.22 The organiser should include venues and their visitors in any Customer Care policy, or produce such a policy for a specific touring exhibition. When developing the exhibition, it should take account of the visitors which each venue anticipates, so that the latter can respond to the needs of its visitors [2].
- 13.23 Height, eyesight and other differences between visitors should be considered at the design stage, as well as during installation. Provision should be made for people with impaired mobility or with other special needs. Notices should be provided in more than one medium (eg audio-guides as well as written notices), and measures should be considered for the comfort and safety of visitors. The circulation route and seating should take into account the layout in each venue, the time needed to do justice to the exhibition, anticipated levels of attendance, and visitors' stamina [14].
- 13.24 Designing the exhibition to take account of the needs of people with disabilities can make the exhibition more accessible overall. People with visual impairments may require brighter light and closer access than is sometimes allowed; organiser and venues might consider providing higher light levels for short periods, eg with push-buttons, or allowing some exhibits to be touched by people with visual impairments. Explanation should be given for any reduction in light levels [15].
- 13.25 Where a venue has not written a Customer Care policy, it should take advantage of an incoming exhibition to review its attitude to its visitors, and to train staff. Visitors should be offered the opportunity to comment on the exhibition. Venues should be prepared to deal with any response to exhibits, imagery or themes which might be considered controversial or offensive [3]. There should also be a procedure for dealing with comments and complaints, and staff should be given appropriate training. Research should be undertaken regularly to gauge perceptions of the exhibition programme and the venue [1, 2].
- 13.26 The venue should take positive action to remove barriers to physical access. This includes action for people with disabilities or for very young, elderly or infirm people. It includes action on opening hours, to take into account the needs of people who cannot visit during normal opening hours. It also includes concessions for unemployed people, students, those accompanying people with disabilities, etc [10].
- 13.27 Charges and concessions should appear in printed publicity and be displayed at all points of public entry to the exhibition [20]. Publicity about opening times should include information on last admissions and the average time needed to see the exhibition. It should include details of timed tickets for popular exhibitions, and any requirement to book in advance, eg for groups above a certain size.
- 13.28 In principle, there should be no restrictions on physical access, but every venue should state clearly the circumstances when restrictions (eg the number of people permitted in the exhibition at any one time) are necessary, for the comfort and safety of all visitors and for the security of the exhibits. Notices outside the exhibition should explain any restrictions, and staff should be trained to respond courteously to visitors who may be affected by these restrictions. Where there is space, waiting facilities should be provided, if possible under shelter and with seating and refreshments. Staff should be trained to manage queues.
- 13.29 Parking should be adequate for the anticipated attendances, and special arrangements should be made, if necessary, for school visits or other groups arriving by coach. Details of public transport, car and coach parking and cycle racks should be included in publicity [20].
- 13.30 Plans and internal signs should be provided within the venue to aid orientation. Assistance and information should be readily available to all visitors, including those with mobility or sensory impairments. There should be a notice giving reasons if personal possessions are not allowed into the exhibition area, and these items should be handled and stored carefully, safely and free of charge. Toilets and catering should be available to cope with anticipated levels of attendances. Where they are

not adequate, information should be given in publicity material and in the exhibition on the location of the nearest facilities [20].

- 13.31 The exhibition space should provide visitors with comfortable levels of temperature, humidity and cleanliness. Closure and equipment failure should be explained in a notice and attended to promptly [18]. Staffing levels may vary from venue to venue, and the organiser should bear in mind local circumstances when designing the exhibition. Staff and volunteers should be briefed about the exhibition, and should be able to deal promptly and courteously with enquiries, requests and complaints, as well as ensure visitors' safety and comfort. Appropriate provision and support should be provided for group visits, particularly if pre-booked, in every way that the facilities and the exhibition permit. Exhibition installations should comply with all applicable planning, safety and other statutory requirements. Provision should be made to deal with emergencies, and all members of staff should understand their duties in an emergency [39].
- 13.32 A venue should make special arrangements to deal with visitors in excess of normal attendance levels. Fire and safety officers should be consulted to ensure the safety and comfort of particular groups, such as wheelchair users [37]. A venue may also need to control the flow of visitors, both in the venue overall, and in the exhibition gallery, education room or catering area.

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- Pearson, A., *Arts for everyone*, 1987, Carnegie UK Trust and CEH, London.
- *Providing accessible visitor attractions*, 1994, English Tourist Board.
- Most exhibition venues should be able to adopt the English Tourist Board's 'National Code of Practice for Visitor Attractions'.
- First aid should be available for employees under the Health & Safety Executive's Approved Code of Practice (HMSO, ISBN 0118855360), and this service should also be extended to volunteers and visitors.

14 Standards for design

- 14.1 Design translates a concept into a physical form which should convey a message, protect the exhibits and be able to be moved from venue to venue.

The organiser should design the exhibition:

- 14.2 to the agreed timetable and budget;
- 14.3 to carry and enhance the message of the exhibition;
- 14.4 to maximise the emotional and educational impact of the exhibits;
- 14.5 with attractive, legible and intelligible interpretation;
- 14.6 to facilitate supervision of exhibits;
- 14.7 to maintain environmental continuity for the exhibits;
- 14.8 to take into account the differing needs of visitors;
- 14.9 to allow visitors to experience the exhibition in safety;
- 14.10 to take into account the comfort of visitors;
- 14.11 to be moved easily by the staff and equipment available to each venue;
- 14.12 to be installed and dismantled with minimum risk to exhibits and staff;
- 14.13 to be robust enough for the proposed tour;
- 14.14 to fit the different venues;
- 14.15 to be adequately protected by its packing materials;
- 14.16 to be easy to transport;
- 14.17 to be economical to produce and maintain.

The venue should:

- 14.18 provide the organiser with details for access, storage and display;
- 14.19 respect the integrity of the design of the exhibition.

Guidelines and notes

- 14.20 The design of an exhibition takes into account requirements which are often in conflict with one another. The organiser has the primary responsibility for drawing up a design brief which places different requirements in order of priority. The designer is then responsible for reconciling these requirements as harmoniously as possible. The effect of designing an exhibition on other work in the institution should be gauged, and an external designer commissioned where necessary. The organiser should define this person's role and responsibilities in relation to the aims and objectives of the exhibition, set out the budget and timetable, and agree fee and expenses.
- 14.21 Venues will adapt the structure provided for the whole tour to suit their spaces and to meet the needs of their visitors. They should respect the approach inherent in the design, and should not change it

significantly without the organiser's agreement. Where they are allowed to add their own exhibits, they should agree with the organiser whether their display should follow the same style, colour, typeface, numbering, etc as the core exhibition [10].

- 14.22 Displaying exhibits is the essence of an exhibition. Without exhibits, there would be no exhibition and no reason for the various safeguards and other aspects of exhibition design. The designer should take into account conservators' recommendations and otherwise ensure that the integrity and safety of the exhibits is not compromised [25, 35].
- 14.23 Making exhibits available to the public is the essential justification for the exhibition. Without visitors, there is no reason for the labour and cost of putting on an exhibition. The designer will therefore consider the three-dimensional organisation of the exhibition. This will include a method of presentation which gives maximum visual impact to the exhibits [11, 16, 17]. Market research should help to determine the way that exhibitions are designed, and formative evaluation should be used to test the design [2, 5].
- 14.24 The exhibition should be designed to enable all visitors to enjoy it in safety and comfort. It should take into account the time needed to do justice to the exhibition, the anticipated levels of attendance and visitors' stamina. Consideration should be given at the design stage to provision for people with sensory and mobility impairments or with other needs [13].
- 14.25 Design should be considered from the moment the concept takes shape [3]. An exhibition is an intellectual and emotional journey as well as a physical exercise. Design is concerned with the movement of visitors between the different elements in this story, and with the information which they will want during this journey [11]. The visitor's journey extends to each side of the exhibition, and the design of publicity and publications is also important [20, 21].
- 14.26 A designer's brief should include ease of transport for the display structure and other materials as well as the exhibits themselves [30, 32]. Touring requires simplicity of installation and dismantling, and structures should be robust enough to withstand the wear and tear of a tour [28]. The exhibition structure should be well-made and easy to maintain. It should be accompanied by full installation and packing instructions, and by a kit for maintaining its condition and for repairing likely damage or making good losses [17]. A touring exhibition should be designed with sufficient flexibility to fit different venues. Venues should provide plans and dimensions of their exhibition spaces and access routes, and inform the organiser of features that need to be considered at the design stage [30].

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- *Exhibitionist* is the periodical of the National Association for Museum Exhibition (NAME is a standing Professional Committee of the Association of American Museums), c/o Putnam Museum, 1717W. 12th Street, Davenport, IA 52803. USA.

15 Standards for lighting

- 15.1 Every showing should achieve the best possible balance between allowing visitors to see and enjoy the exhibits, and reducing duration and intensity of natural and artificial lighting to minimize damage to the exhibits.

The organiser should:

- 15.2 plan for the time and cost of providing appropriate lighting;
- 15.3 consult the lender on the acceptable dosage or exposure limit for each exhibit;
- 15.4 request details of normal light levels in the venues;
- 15.5 inform venues of the permitted dosages or exposure limits for visible light and ultra-violet radiation;
- 15.6 take all necessary steps to protect sensitive materials from excessive exposure;
- 15.7 plan lighting so that visitors are able to experience the exhibits;
- 15.8 plan lighting to contribute to the exhibition's theme or story;
- 15.9 plan lighting to take into account the characteristics and facilities of each venue;
- 15.10 advise visitors of the reasons for any lighting restrictions.

The lender should:

- 15.11 establish what dosage or exposure limit is acceptable for each loan (including for photography or filming);
- 15.12 agree with the organiser any necessary measures to protect sensitive materials from excessive exposure to visible light and ultra-violet radiation.

The venue should:

- 15.13 supply the organiser with relevant data from monitoring levels of visible light and ultra-violet radiation;
- 15.14 agree with the organiser methods of control to bring exposure within the permitted dosage;
- 15.15 control lighting to achieve the required levels;
- 15.16 ensure that any protection provided by the organiser is not compromised during the showing;
- 15.17 within the above limitations, ensure that each exhibit is illuminated to a level which allows it to be seen and enjoyed;
- 15.18 provide transitions from brightly-lit spaces to areas with reduced light levels;
- 15.19 advise visitors of the reasons for lighting restrictions.

- 15.20 Natural and artificial lighting is damaging to most exhibits. Damage is cumulative, so the length of exposure is as crucial as light levels. The organiser should agree with a lender a maximum dosage, and then require each venue to work within an appropriate proportion of this dosage, which should include any special lighting for photography or filming [27]. Exhibits should be kept in the dark whilst in storage or while the exhibition is not open to the public [31].
- 15.21 Light levels during the period the exhibition is open to the public will be a compromise between the needs of visitors and protection of exhibits. With the exceptions of interactive exhibitions or some of those designed for blind or partially-sighted people, exhibitions are predominantly visual experiences for which light is fundamental. Directional lighting can enhance the viewer's perception and understanding of individual exhibits by emphasising form or surface texture. People with visual impairments may require brighter light and closer access than allowed by current practice [13]. Some works of art are designed to use lighting effects.
- 15.22 Light is also an element of design, contributing to the message. Light can be used to set a mood or give drama to an installation, but dramatic lighting with strong contrasts and areas of semi-darkness between exhibits can cause problems for people with visual impairments. Light fittings which are integrated into the exhibition design will help to minimise variations between different showings.
- 15.23 Full records should be kept of all readings of visible light and ultra-violet radiation in all display, handling and storage areas. Venues should supply the organiser on request with relevant data from monitoring light levels in the exhibition areas for the season during which the exhibition will be shown. Monitoring equipment should be maintained and used by trained staff.
- 15.24 The organiser should advise venues of lighting and power requirements as soon as possible. Before exhibits are installed, lighting equipment should be fully inspected and cleaned, and faulty or failed lamps and tubes should be replaced. Lamps should be installed, directed and dimmed according to a lighting plan which specifies the maximum amount of light allowed for each exhibit. Where possible, lighting should not be controlled in such a way that individual lamps cannot be dimmed without affecting other lamps. It should also direct and illuminate the visitor's path through the exhibition. The plan will need to be interpreted with skill to bring out the best in the exhibits.
- 15.25 During the showing, light fittings should be checked daily. Faulty or failed lamps and tubes should be replaced with the same type and wattage, before the exhibition opens to the public each day. The settings for control equipment for dimming should not be altered during the showing, except with the authority of the person responsible for the showing. Control equipment should be maintained and used by trained staff. Display cases should be designed so that lamps and tubes can be replaced without opening a case or disturbing exhibits [16].
- 15.26 Ultraviolet radiation should be eliminated because it is so damaging. Protective films and varnishes on windows and/or lamps should be checked once a month to ensure that they are still effective. Special lamps can be introduced for the few cases (eg demonstrating the use of whiteners in washing powders or luminescence in minerals), where ultra-violet light is important.
- 15.27 Displays should be designed to avoid concentrations of heat produced by natural or artificial light. Exhibits should be positioned away from sources of artificial light and their control units, and excess heat should be dissipated by ventilation [16, 35].

Sources of advice and help

- Cassar, M., *Environmental Management: Guidelines for Museums and Galleries*, 1993, Museums & Galleries Commission, London.
- Chartered Institution of Building Services Engineers, *Lighting guide: museums and galleries*, (revised edition forthcoming), Chartered Institution of Building Services Engineers, London.

- Nassau, K., 'Conserving light-sensitive minerals and gems' in Howe, F. M., *The Care and Conservation of Geological Material*, 1992, Butterworth-Heinemann, Oxford.
- Scottish Museums Council, *Caring for Museum Collections*, a Video and Information Pack, 199/0, Scottish Museums Council, Edinburgh.
- Stolor, N., *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, Butterworths, Oxford.
- Thomson, G., *The Museum Environment*, 1986 (2nd edition), pp 2-64 and pp 164-208, Butterworths, London.

16 Standards for display cases and frames

- 16.1 Display cases and frames usually reconcile several functions: they should support exhibits and enhance a display which is attractive and communicative; they should protect exhibits from theft, fluctuating humidity, pollution and other risks and, if they travel with the exhibition, they should be robust, easy to transport and assemble, and adaptable to each venue.

The organiser should:

- 16.2 assess the needs of the exhibits and the risk in each venue, and decide if display cases or frames are required;
- 16.3 plan for the time and cost of obtaining suitable display cases or frames;
- 16.4 define the level of protection and display needs;
- 16.5 inform venues, to see if these standards and requirements can be met using venues' own display cases or frames;
- 16.6 provide suitable display cases or frames where venues are unable to meet these standards and requirements;

See also paragraphs 17.7 - 17.11.

The lender should:

- 16.7 agree specifications for display cases and frames with the organiser;
- 16.8 agree with the organiser when exhibits should be installed and removed from display cases and frames.

The venue should:

- 16.9 plan for the time and cost of providing suitable display cases if requested by the organiser;
- 16.10 provide details of the dimensions and performance of any of its own display cases which might meet the organiser's requirements;
- 16.11 provide where possible display cases appropriate to the number, size, character and interpretation of the exhibits;
- 16.12 provide where possible display cases which give the level of protection required by the organiser;

See paragraphs 17.15 - 17.22.

Guidelines and notes

- 16.13 This section is concerned with the role of cases and frames in enclosing and protecting exhibits, and should be read together with the supporting and displaying functions of display furniture [17]. It includes frames where they are designed or adapted to protect paintings and drawings. Frames that are museum objects in their own right may have to be protected by a further container.
- 16.14 Display cases and frames that are intended to protect small, valuable or fragile exhibits from theft or damage should be strong and should incorporate locks and alarms appropriate to the risk. Display cases or frames should not be regarded as a substitute for a strongly-defended building or adequate supervision [34].

- 16.15 Sealed display cases or glazed frames provide a final line of environmental protection, giving precise local control over temperature, humidity and pollution. Venues should ensure that they can provide enough outer protection to enable this inner protection to be kept to a minimum. A case or frame will need to be more elaborate (so heavier, more expensive and more difficult to tour), the less stable a venue's environment [35].
- 16.16 Microclimates should be created using sealed display cases or glazed and backed frames, where it is not possible to provide the required conditions in individual rooms or zones, or where different materials have different needs. The aim is to maintain exhibits close to a specified humidity level and to keep fluctuations as small and as gradual as possible. Microclimates should be monitored, and wherever possible readings should be checked without opening the case.
- 16.17 The organiser should agree with lender and venues any methods of fixing or holding an exhibit in place [28]. For the construction of display cases or frames and for the mounts within them, materials and finishes should be selected which do not give off harmful emissions that will be trapped by sealing. Exhibits should not come into contact, or into close association, with materials that emit harmful substances. All materials used for display of exhibits must be tested before being used in the construction, fitting out or dressing of a case or frame. Construction, dressing and painting should take place well before installation, and exhibits should not be installed until paints and glues have dried thoroughly. Lighting should avoid glare, distracting reflections in the glass of frames or showcases and troublesome shadows on exhibits or labels.
- 16.18 Temperature and humidity readings in a gallery should not be used as a guide to conditions within a case or frame, which should be monitored separately to ensure that there is no localised heating. Natural or artificial light can increase the temperature and cause fluctuations in humidity. The air in a cooling showcase will contract and suck in dust and other pollutants if the case is not sealed well. Display cases with integral light boxes should provide ventilation above the light box, and, because of their low heat output low-voltage and fibre-optic lighting should be used where possible. Care must be taken in positioning transformers and other electrical equipment which also generate heat [15].
- 16.19 Cases with integral lighting should be designed so that lamps and bulbs can be changed without opening the case and disturbing the exhibits [15]. Cases should also be designed to avoid swinging doors, sharp edges, large panes of glass or unwieldy sections, which can injure staff as well as damage the exhibits.
- 16.20 Each venue should be advised of any display cases it should provide. The organiser should set out who is responsible for installing and dismantling the exhibition, and what the venue's responsibilities are, even where this work is carried out by the organiser [28]. The venue should make arrangements to meet service and storage requirements, indicating those it can meet immediately and confirming later when others have been met.
- 16.21 Display cases, panels and other exhibition furniture which travel with the exhibition should be packed separately from the exhibits [30]. Packing should be clearly labelled and stored in similar environmental conditions to the exhibits and their packing [31].
- 16.22 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

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- Belcher, M., *Exhibitions in Museums*, 1991, Leicester University Press, Leicester.
 - Stollow, N., *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, Butterworths, Oxford.
 - Advice on display cases or frames and the design of exhibitions can be obtained through the Area Museum Councils, some of which offer a design service.

17 Standards for display furniture

- 17.1 Display furniture should support exhibits and help to attract and communicate with visitors. If it travels with the exhibition, it should also be robust, easy to transport and assemble, and adaptable to each venue.

The organiser should:

- 17.2 plan for the time and cost of arranging or providing display furniture;
- 17.3 assess the needs of the exhibits and define standards and requirements for supporting and interpreting them;
- 17.4 use inert and fire-retardant materials for the construction and dressing of displays;
- 17.5 ask venues if display requirements can be satisfied using their furniture;
- 17.6 provide suitable display furniture where venues are unable to meet these standards;
- 17.7 design such furniture to take account of access to and within the venues;
- 17.8 provide a checklist of display furniture;
- 17.9 provide any special tools and instructions for moving, assembling and dismantling the furniture;
- 17.10 provide packing to protect display furniture in transit;
- 17.11 provide a repair kit and replacement parts.

The venue should:

- 17.12 plan for the time and cost of arranging or providing display furniture;
- 17.13 provide details of such of its own display furniture as might meet the organiser's requirements for supporting and interpreting the exhibits;
- 17.14 agree with the organiser to supply any display furniture appropriate to the number, size, character and interpretation of the exhibits;
- 17.15 ensure that the construction and dressing of displays use inert and fire-retardant materials;
- 17.16 provide details of sizes of door openings and service routes if display furniture travels with the exhibition;
- 17.17 check the condition of the display furniture following the organiser's procedures;
- 17.18 follow the organiser's instructions for assembling and dismantling the display furniture;
- 17.19 protect display furniture during the showing;
- 17.20 replace packing which is unsuitable for re-use;
- 17.21 store packing materials safely and in similar environmental conditions to the exhibition space;

17.22 inform the organiser of any repairs.

Guidelines and notes

- 17.23 Display furniture includes graphic and text panels, showcases, frames, mannequins, plinths, screens, integral lighting, barriers and other elements of the exhibition installation. It provides a setting for the exhibits and supports them safely in a position which is convenient for visitors. It can help to bridge gaps in scale between small exhibits and large galleries, to establish circulation patterns and to set the style and the message of the whole exhibition. Where possible, information points and seating for visitors should be designed as part of the overall display. Display furniture should be safe for visitors, stable and without sharp corners or dangerous protrusions [14-16, 18].
- 17.24 Display furniture provides a final line of protection for the exhibits, supporting and distancing them from the visitor where appropriate [34]. It should be level and stable, and should not subject the exhibits to excessive vibration. A display mount should be strong and stable, providing maximum support in relation to the exhibit's weight and centre of gravity. The fixing or mounting technique should not damage the exhibit. Display furniture should be made of materials which do not have a detrimental effect on the exhibits. It should permit exhibits to be installed and removed safely, and should allow cleaning and maintenance without risk to the exhibits.
- 17.25 The advantage of the organiser providing display furniture lies in the ability to control both the appearance of the exhibition and the safety of the exhibits. The disadvantages are the high cost of designing and making dismountable furniture, and the staff-time and transportation needed for touring materials other than the exhibits. The materials and the method of construction of any furniture that travels with the exhibition should be suitable for the length of the tour. Materials and components should be able to withstand wear and tear, and should be easy to maintain and economic to repair or replace. They should be protected from aggressive treatment by staff (eg during cleaning) as well as by visitors.
- 17.26 Costume displays should have appropriate mannequins or dress stands which must be of the correct size and shape and made of approved materials. The organiser should agree the design of mannequins and stands with the lender and designer. Lenders may specify that their mannequins be used and that their staff assemble them and mount the costumes [28, 33].
- 17.27 The organiser should confirm details of the space required and the service needs (lighting, power, maintenance), so that the venues can make arrangements to meet all requirements before the exhibition is delivered. Instructions should be provided for moving display furniture between the loading area and the exhibition area without injury to staff or damage to the furniture or the building. Furniture should be provided with hand-holds and tying-in points and be designed for mechanical lifting and moving equipment where this is available [28]. The organiser should provide a checklist of display furniture, including sizes and weights, as part of the tour inventory [6]. The organiser should include display furniture in the condition-check procedure [29].
- 17.28 The organiser should also set out who is responsible for installing and dismantling the exhibition even where this work is carried out by the organiser [28]. Precise instructions, with diagrams if appropriate, should be provided for unpacking, assembling, dismantling and packing, both to minimise damage and to save time and effort [30]. The organiser should provide maintenance instructions, and a repair kit with replacement parts where appropriate. Venues should inform the organiser if any repairs are carried out and if the repair kit needs replenishing. Paint and glue should be allowed to dry thoroughly before exhibits are installed.
- 17.29 Adequate packing should be provided; it should be clearly labelled; it should be stored in similar environmental conditions to the exhibits and their packing [31]. The organiser should retain a stock of spare packing, so that venues can replace with the correct material any packing which is dirty or has been damaged.

Sources of advice and help

- Belcher, M., *Exhibitions in Museums*, 1991, Leicester University Press, Leicester.
- Hall, M., *On Display: a design grammar for museum exhibitions*, 1987, Lund Humphries, London.
- Velarde, G., *Designing Exhibitions*, 1988, Design Council, London.
- Witteborg, L.P., *Good show!: a practical guide for temporary exhibitions*, 1992 (2nd edition), Smithsonian Institution, Washington DC.
- Advice on display cases and the design of exhibitions can be obtained through the Area Museum Councils, some of which offer a design service.

18 Standards for equipment and working exhibits

- 18.1 All mechanical and electrical equipment that is part of an exhibition should be installed properly and maintained regularly by authorised staff. Equipment failures should be put right as quickly as possible.

The organiser should:

- 18.2 plan for the time and cost of arranging or providing equipment;
- 18.3 specify at the offer stage any equipment to be provided by the venue;
- 18.4 provide any other necessary equipment;
- 18.5 ensure that all equipment which travels with the exhibition meets current safety standards;
- 18.6 ensure that this equipment is robust enough to withstand the tour;
- 18.7 provide suitable packing and instructions for unpacking and repacking;
- 18.8 provide handling and installation instructions;
- 18.9 specify the power or other services required;
- 18.10 provide operating instructions;
- 18.11 provide maintenance instructions;
- 18.12 set out a procedure for breakdowns;
- 18.13 repair or replace equipment as soon as possible.

The venue should:

- 18.14 provide any equipment requested at the offer stage, or inform the organiser immediately if this is not obtainable;
- 18.15 plan for the time and cost of providing this equipment;
- 18.16 plan for the time and cost of maintaining and supervising any equipment in the exhibition;
- 18.17 provide power or other services, as appropriate;
- 18.18 observe the organiser's instructions for packing and unpacking equipment which travels with the exhibition;
- 18.19 observe the organiser's instructions for handling this equipment;
- 18.20 observe the organiser's instructions for using this equipment;
- 18.21 ensure that equipment is being used as intended;
- 18.22 observe maintenance instructions;
- 18.23 inform the organiser about faulty equipment and any remedial action taken;

18.24 advise visitors about any equipment failure;

18.25 provide feedback to the organiser on the venue's experiences with the equipment.

Guidelines and notes

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- 18.26 This section is concerned with any mechanical or electrical equipment that is part of an exhibition, but not with monitoring equipment. It is concerned with the operation of audio-guides, tape-slide programmes, videotape and computer-driven videodiscs, but not with how the content of these audio-visual or interactive devices will help to interpret the exhibits [11]. This section is also concerned with the operation of automata, kinetic works of art, artists' work on video and other working objects which are exhibits in their own right, but not with the process of obtaining this material [24].
- 18.27 The organiser should provide details of any equipment supplied or required as soon as possible, and should specify who is responsible for installing and dismantling so that venues know what arrangements they must make [28]. Equipment should be packed separately from the exhibits [30]. The condition of working objects and equipment should be checked by a competent person [29]. The organiser should provide detailed instructions and/or training for handling and installing any equipment that travels with the exhibition. A parts list, special tools, diagrams, etc should be provided as appropriate. The venue should ensure that this equipment is installed properly and maintained regularly by trained staff to current safety standards.
- 18.28 Computers should be moved only after following the precautions laid down by the organiser. Computer, screen and keyboard must receive power from the same phase of a venue's supply. Any computer which travels with the exhibition should only be used for the purpose intended by the organiser, and venues should ensure that no unauthorised discs or programmes are used.
- 18.29 Interactive and similar devices should be located as near as possible to the exhibits they are intended to explain or enhance, and there should be a clear visual link between them. Audio-visual equipment should not dominate the exhibition, either visually or aurally. It should be located so as not to interfere visually with other exhibits, and to minimise disturbance from the sound track, as much for the benefit of warding staff as for visitors.
- 18.30 The venue should provide adequate supervision [34]. Warding staff should be briefed so that they understand the treatment that equipment can tolerate. In many cases, working objects can only be demonstrated by competent and knowledgeable interpreters [19]. The organiser should be advised of actual or potential problems.
- 18.31 Equipment should be checked daily. Maintenance and repair should be available during weekends and other times when specialist staff are absent. A venue should carry out simple fault-finding procedures, but the organiser should authorise the level of repair the venue might undertake. A repair kit including special tools and clearly-labelled, authorised parts should be supplied, if appropriate. There should be a contact and phone number for further information on equipment which fails to work.
- 18.32 The organiser should be ready to repair or replace at short notice any equipment which is essential to the exhibition. There should be a stand-by for all vulnerable equipment or components, or replacements should be obtainable from identified suppliers within twenty four hours. The venue should inform the organiser of any remedial action taken and any components taken from the repair kit.
- 18.33 For audio and video equipment, staff should be briefed and notices should be available, in more than one medium if possible, explaining the subject of the programme or tape, how long it is and when it is available. Visitors should be informed about any equipment failure, and when it might be expected to be put right [13].
- 18.39 Working objects should be treated to the standards and according to the guidance set out in *Standards in the Museum Care of Larger and Working Objects: Social and Industrial History Collections*, 1994, Museums & Galleries Commission, London.

Sources of advice and help

- Bearman, D. (ed), *Hypermedia and interactivity in museums: proceedings of an international conference*, 1991, Archives and Museum Informatics, Pittsburgh (Pennsylvania). Archives and Museum Informatics Technical Report No 14.
- Hoffos, S., *Multimedia and the interactive display in museums, exhibitions and libraries*, 1992, British Library, Boston Spa. Library and Information Research Report, No 87.
- Pring, I. (ed), *Image '89: the international meeting on museums and art galleries image databases: proceedings of the IMAGE meeting held at the University of London Audio-Visual Centre, UK, 18-20 May 1989*, 1990, IMAGE, London.
- In the UK all electrical wiring and equipment (including portable equipment) must be installed in accordance with the appropriate British Standard, the Institute of Electrical Engineers' Regulations and the Electricity at Work Regulations. Wiring and equipment must be regularly maintained and checked as required by these regulations. All mechanical equipment must be installed in accordance with the appropriate British Standard and statutory instructions, and it must be regularly maintained. A venue outside the UK will abide by the standards and regulations in the country in which the showing takes place.

19 Standards for performances

- 9.1 If a performance, lecture or other event is essential to the organiser's showing, it should be available to all the venues. The safety of exhibits should be assured in all areas affected by the event. Events should be adequately promoted. As far as a venue's facilities allow, performers' requirements should be met. The audience should be comfortable and safe, and the venue must abide by the regulations that apply to events where the audience is seated.

The organiser should:

- 19.2 determine whether live art is important to the content of the exhibition;
- 19.3 determine whether live interpretation can help to communicate the message of the exhibition;
- 19.4 plan for the time and cost of providing the venues with information on events;
- 19.5 design the exhibition to allow space for events, and for seating if appropriate;
- 19.6 advise venues of the relevance and professionalism of any artists, interpreters or speakers it recommends;
- 19.7 give venues any general information on availability, procedures and costs of artists and interpreters;
- 19.8 act as a clearing house for the use of artists or interpreters during a tour.

The venue should:

- 19.9 satisfy itself that the event is pertinent to the theme of the exhibition;
- 19.10 satisfy itself that the event will be executed to professional standards;
- 19.11 plan for the time and cost of arranging the event;
- 19.12 install the exhibition to allow space for the event, and seating if appropriate;
- 19.13 provide facilities for the event;
- 19.14 provide adequate 'backstage' facilities;
- 19.15 agree adequate time, assistance and access to setup and dismantle the event;
- 19.16 close off parts of the building to the public during installation and dismantling, as appropriate;
- 19.17 allow time for rehearsal where appropriate;
- 19.18 ascertain the public capacity of the space to be used;
- 19.19 ensure that any seating conforms to statutory legislation;
- 19.20 abide by appropriate Health & Safety regulations;
- 19.21 publicise the event;
- 19.22 provide advance booking and distribution of tickets if appropriate;

- 19.23 provide advance notice of any behaviour or language which might be considered violent or shocking;
- 19.24 sign and supervise all public access routes to and from the event;
- 19.25 monitor the nature and conduct of the event;
- 19.26 provide feedback about the event to the organiser.

Guidelines and notes

- 19.27 Events staged by performance artists may be an integral part of a touring exhibition as exhibits in their own right. Live art, and any other events which are essential to a showing, should be included in the package offered to each venue [10]. The venue should finalise actual timing and detailed arrangements directly with the artists or interpreters.
- 19.28 Where performances, demonstrations, etc are optional, the organiser should give guidance on desirability, availability, procedures and costs to enable each venue to decide what is appropriate and affordable. Venues should advise the organiser of their experience of artists and interpreters, whether suggested by the organiser or found locally, and provide names, addresses and recommendations. The organiser should act as a clearing house, soliciting information from past showings and passing on their experience and advice to subsequent venues.
- 19.29 Informal talks by artists, guided tours by curators or scholars, demonstrations of techniques or machinery, artist-in-residence projects, discourses by professional actors in costume, and informal performances by musicians or Theatre-In-Education companies are methods of interpretation. Live interpretation should either reinforce the exhibition's message or use exhibits as points of departure, complementing the factual information available elsewhere in the exhibition [11]. It is suitable for demonstrating how things work, for communicating what is known about the opinions, beliefs and attitudes of life in the past, or for proposing possible interpretations and hypotheses.
- 19.30 Short events by performance artists and live interpretation in front of the exhibits come under the regulations for circulation in public spaces which normally apply to museums and galleries. The audience may move from exhibit to exhibit, but some seating should be provided for people who are less able to stand [13].
- 19.31 Different regulations apply when a venue holds a performance involving a seated audience, eg concerts, lectures, readings, dance or theatrical events, screenings of films or videos. A local authority public entertainment or other licence might be required. Numbers permitted under the regulations for seating in public spaces should not be exceeded or circumvented by allowing the audience to stand, sit in the aisles or otherwise block access. Regulations govern the type of seating, width of aisles and number of seats between aisles. Temporary arrangements to raise or rake seating should conform to regulations and should not pose undue physical risks. Arrangements must satisfy the local authority Building Control Officers, Health and Safety Officers and Fire Officers. Building Control regulations are concerned with the capacity of the venue, staffing levels, exit routes, emergency lighting, and any risks posed by staging. Their interpretation will vary in detail from one local authority to another.
- 19.32 Copyright legislation applies to the use of music in public performances. The Performing Right Society acts on behalf of composers, authors and publishers and issues licences for the use of live or recorded copyright music. Phonographic Performance Limited and Video Performance Limited act on behalf of record companies and performers and issue licences for the use of commercial sound and video recordings.
- 19.33 Each venue should be clear about its aims and expectations and should budget and prepare for the event. There should be a written agreement with the performers which sets out the purpose of the event, timing, facilities, fees and expenses, etc. The venue should assign a member of staff to liaise with the artists or interpreters, to brief them on the local situation and the needs of visitors, to oversee

preparations, to arrange any necessary assistance, and to train staff to deal with the event and with visitors. Inexperienced artists or interpreters may be unclear about their needs, and may require guidance from a local professional in the same field.

- 19.34 Artists and interpreters should be briefed, so that they respect museum and exhibition practice. They should be given precise instructions concerning access, props, field of action, lighting, etc. Performances should be staged where there is sufficient space to perform without risk of physical contact with the exhibits. Where events are likely, the exhibition layout should be designed with this in mind. Drama-trained interpreters should be sensitive to the close contact with visitors, which is different from the conventional stage. Costumes and accessories should be of high quality because they are also seen at close quarters. The venue should inspect a script or detailed synopsis, which must meet its standards of scholarship and interpretation and be relevant to the local situation.
- 19.35 The venue should obtain well in advance a detailed list of the artists' or interpreters' requirements, which might include: rehearsal time and space; access separate from (or invisible to) the public; a raised podium or platform where seating is not raked; a floor suitable for dance; facilities for blackout, lighting and projection; and access to power. Artists and interpreters should supply details of the access and time required to set up before the event and to dismantle afterwards. Where necessary, the venue should arrange to keep open beyond working hours, or to close parts of the building during opening hours. Special supervision should be provided [34]. Performers should specify if space is needed for a backstage area and for a changing room, and the venue should take suitable precautions to protect exhibits where display areas have to be used for these purposes. There should be clear communication between the venue's staff responsible for 'front of house' and those responsible for these areas. Where possible, artists and interpreters should have access to toilet facilities separate from those available to the public.
- 19.36 The venue should ensure that any lighting or sound amplification system meets the performers' needs without putting at risk either the audience or any exhibits remaining in the performance area during installation and performance. Display lighting will rarely be suitable for even simple concerts and readings, but temporary lighting presents hazards in terms of excessive light and heat and exposed cabling and equipment, and it should be closely supervised [15].
- 19.37 Events should be publicised, particularly within the intended target group [20]. The venue should agree with the performers the amount of publicity material which they should provide, and agree responsibilities for different aspects of promotion and publicity. The venue's regular publicity may not reach people who have a special interest in the performance and who may be new to the institution. In addition, a different timescale is usually needed for publicising events.
- 19.38 For performances with a seated audience, advance booking should be used to predict and control the size of the audience. Printed tickets should be used if they are to be distributed or sold in advance, if they are available from more than one outlet, or if numbered or differently-priced seating is to be used. Ticketing is important for fire control purposes, and for reconciling 'box office' takings.
- 19.39 The venue should retain the right to halt or cancel any event which threatens the safety of exhibits or visitors. Warding staff should be briefed, and possibly increased in numbers, to prevent visitors from accidentally touching exhibits while the performance has their attention [34]. Staff should be prepared for sudden noises, accidental triggering of fire-prevention systems, vibration in nearby display cases, etc. The venue should also consider how to advise the audience if the content is likely to offend. Visitors to the venue may expect any event staged there to be suitable for all age groups and viewpoints, and may not be prepared for material which might be thought shocking or controversial.
- 19.40 When events take place outside normal opening hours, unsupervised parts of the institution should be properly secured. Access routes from the entrance to the performance area, and from there to the toilet facilities, should be supervised and signposted. The venue should ensure that there is sufficient staff to cope with anticipated numbers. Staff should be fully briefed about the content and duration of the event, about arrangements for any interval, location of toilets, selling of tickets, programmes and refreshments, stewarding, emergency procedures, etc. Procedures should be agreed to cope with

latecomers or gatecrashers. Staff should be briefed on procedures for handling money and accounting for their takings during or after the event.

Sources of advice and help

- Bywaters, J. and Richardson, P., 'Breathing Life into Exhibits' in *Museums Journal*, pp 30 ff, October 1993.
- Farmelo, G., 'Drama in the Galleries' in Durrant, J. (ed), *Museums and the Public Understanding of Science*, 1992.
- Summers, R., 'Professional education or amateur dramatics' in *Museum Development*, pp 14 ff, June 1993.
- The Performing Right Society, 29-33 Berners Street, London, W1P 4AA.
- Phonographic Performance Limited and Video Performance Limited, Ganton House, 14-22 Ganton Street, London, W1V 1LB.

20 Standards for publicity

- 20.1 Publicity should be part of a marketing strategy to inform and attract visitors to the exhibition. The strategy should be agreed between the organiser, which should be responsible for the factual content, and venues which should be responsible for local promotion.

The organiser should:

- 20.2 plan for the time and cost of publicising the exhibition;
- 20.3 agree with the venues a marketing strategy appropriate to the exhibition and the target audiences;
- 20.4 agree with each venue its most effective media for publicity and promotional purposes;
- 20.5 agree with the venues any advance publicity that it will provide;
- 20.6 either provide published publicity and promotional material, if so agreed with the venues;
- 20.7 or provide venues with draft materials for publicity and promotional purposes, if so agreed with the venues;
- 20.8 transcribe accurately all information agreed with the venues for any publicity to be produced by the organiser;
- 20.9 specify the form of its acknowledgement for any publicity to be produced by the venue;
- 20.10 provide names and addresses for recipients of publicity material;
- 20.11 monitor the effectiveness of each venue's publicity.

The venue should:

- 20.12 plan for the time and cost of advertising and publicising the showing;
- 20.13 agree a marketing strategy with the organiser, appropriate to the exhibition and the target audience;
- 20.14 agree with the organiser the most effective media for advertising and publicising the showing;
- 20.15 either be responsible for the design of publicity and promotional material;
- 20.16 or give the organiser the details of its showing;
- 20.17 distribute publicity material according to the agreed marketing strategy;
- 20.18 arrange advertising according to the agreed marketing strategy;
- 20.19 arrange press views, private views and other publicity events, as appropriate;
- 20.20 exploit all opportunities to inform and attract potential visitors;
- 20.21 provide local signposting, where possible and appropriate;
- 20.22 provide the organiser with evidence of the effectiveness of publicity.

- 20.23 This section is concerned with publicity to attract visitors to the exhibition; it is not concerned with marketing the exhibition to potential venues [3]. The marketing strategy for each exhibition should clearly identify existing audiences, and should consider opportunities for attracting new visitors [2]. Distribution of publicity materials will vary according to each exhibition, and should be targeted towards the audiences identified by each venue.
- 20.24 The organiser should be wholly responsible for the factual accuracy of publicity information about the exhibition. As soon as a booking is confirmed, or at a time agreed with the venues, it should provide advance publicity consisting of briefing notes on the exhibition, draft press releases and good quality photographs in colour and black and white, so that venues are able to take advantage of as many listings as possible. All material should be captioned and in a form that the venues are able to use immediately [7].
- 20.25 The type and appearance of publicity and promotional material should be a balance between the needs of the organiser, the needs of the venues, the target audience and the vehicle (noticeboard, billboard, newspaper) chosen. It should build on any positive image already projected by either organiser or venue. Touring exhibitions should provide opportunities for venues to take advantage of the strengths of others and to learn from their experience and expertise. Venues' experience of their local situations should be taken into account where publicity is provided by the organiser. Publicity will determine how people regard the exhibition without having visited it. Any publicity generated by the venue should contain an agreed acknowledgement to the organiser and the funder. Where possible, it should also be checked by the organiser. Credits to funders should not conflict with the essential purpose of the publicity to promote the exhibition [9].
- 20.26 Posters and invitation cards should contain information on dates of showing and times of opening which are specific to each showing. Where an organiser prints a poster or card, it should also arrange the overprinting with the details of each venue's showing. Posters should indicate if there is an admission charge and give a phone number for details. Publicity materials should not be offered for re-sale [10].
- 20.27 Local advertising should be the responsibility of each venue. Because a showing is of limited duration, information should be readily available and up-to-date. Dates and times of opening should be clearly described, along with any significant restrictions on entry, and unavoidable closures, eg on public holidays, should be publicised well in advance. As far as budgets and regulations allow, major exhibitions should be signposted from major approach routes (eg using AA signs) and identified upon arrival (eg by banners). Care should be taken not to raise unrealistic expectations by employing such methods for less important exhibitions. In order to make maximum impact on the community, a venue should take advantage of opportunities outside the institution, eg by enlisting the help of libraries or encouraging shops to give space to the publication and supporting material. The venue should consult the organiser before using any publicity material for unauthorised purposes or before generating any additional or alternative material for its own use [10].
- 20.28 Each venue will normally have a general leaflet with details of admission, any booking and access arrangements, concessionary charges and any extra charges which may apply to supplementary activities. The leaflet should include details of public transport to the venue and the nearest car and coach parking, and describe other amenities, facilities and services available to visitors [13].
- 20.29 Formative evaluation can help to define the publicity to be used, and might itself contribute to public anticipation [5]. The effectiveness of marketing in general, and of particular aspects of advance publicity, press advertising, etc should be considered as part of the overall evaluation of the project [23]. The records of attendance figures, and possibly also information drawn from visitor surveys on how visitors heard about the exhibition or on the reasons for the visit, might reflect the response of local news media (and might help to confirm the usefulness or otherwise of press views and free catalogues) [21]. Each venue should supply the organiser with copies of its publicity material and cuttings of press reviews and notices relating to its showing, which are useful documentation and evidence for funders and lenders [10].

Sources of advice and help

- French, Y., *The handbook of public relations for museums, galleries, historic houses, the visual arts and heritage attractions*, 1991, Museum Development Company, Milton Keynes.
- Lewis, P., 'Museums and marketing' in Thompson, J. M. A. et al (eds), *Manual of Curatorship*, 1992, (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.
- Runyard, Sue, *The Museum Marketing Handbook*, 1994, Museums & Galleries Commission/HMSO, London.

21 Standards for publishing

- 21.1 Since sales depend on their efforts, venues should be involved early in decisions about the type and cost of any publication and ancillary material. A catalogue of exhibits may be the only permanent record of a temporary exhibition, but its scope and scale should reflect visitors' needs for a souvenir and/or further information on the exhibition.

The organiser should:

- 21.2 in consultation with the venues, define the purpose and market for any publication associated with the exhibition;
- 21.3 ensure that each publication contains information about exhibits and exhibition that is accessible to the target audience;
- 21.4 ensure that the retail price of each publication is accessible to the target audience;
- 21.5 prepare a budget for each publication, and control costs;
- 21.6 prepare a schedule for each publication, and control progress;
- 21.7 ensure that the publication meets legal and ethical responsibilities towards lenders;
- 21.8 have written contracts with authors;
- 21.9 obtain and use an International Standard Book Number;
- 21.10 provide UK deposit libraries with record copies;
- 21.11 provide each lender with an agreed number of copies;
- 21.12 offer incentives to venues and other outlets;
- 21.13 set up and administer a system for delivery, collection, invoicing and credit.

The lender should:

- 21.14 cooperate with the borrower's requests for information on the loan;
- 21.15 make available on request existing photographs at cost or allow new photography where necessary;
- 21.16 indicate the catalogue or accession number to be used in the catalogue of exhibits;
- 21.17 define the wording of an acknowledgement;
- 21.18 decide whether to permit the reproduction of a photograph of a loan;
- 21.19 agree with the organiser the number of each publication required.

The venue should:

- 21.20 advise on the local market for the different options for publishing presented by the organiser;
- 21.21 provide the organiser with relevant sales records;

- 21.22 make every effort to sell publications provided by the organiser;
- 21.23 arrange onward or return transport of unsold copies, as instructed by the organiser;
- 21.24 check invoice and credit notes and arrange payment as quickly as possible;
- 21.25 provide the organiser with sales details as part of overall feedback on the showing.

Guidelines and notes

- 21.26 The traditional purpose of an exhibition catalogue is to list and describe all exhibits, and the catalogue is often the only permanent record of a temporary exhibition. The extent to which this recording function is retained or elaborated will depend on the overall aims of the exhibition and the expected size and interest of the audience. The viability of a publication will depend also on whether there is a gap in the market, how attractive the product is, and, especially in a touring exhibition, on what efforts each venue makes to sell it. A publication may be the traditional printed catalogue, but it might also include a parallel text in braille, or be an audio or video-tape or even videodisc.
- 21.27 The venues should be involved early in decisions about the type and cost of any publication devised as a souvenir and/or as information on the exhibition it accompanies. Records of location of sales-points, types of publication sold and previous spending per visitor in each venue will help the organiser to devise a product that reflects both the scale and importance of the exhibition and the capacities of the venues. What visitors are prepared to buy at each venue will largely determine production run and retail price [22].
- 21.28 Information from venues should help to determine the form and style for souvenirs or information which is most appropriate to the anticipated visitors. Aims and objectives should be set out, so that contributors to a publication are clear whether their peer group is being addressed or whether a wider customer base is intended [11].
- 21.29 Where appropriate, the organiser should prepare a budget and a schedule for the publication distinct from those for the exhibition as a whole. The traditional publication may be the largest and most complicated component in an exhibition, and such measures will help to ensure that it is ready when the exhibition opens. Sponsorship, co-publishing arrangements and sales beyond the exhibition may further distinguish the publication as a discrete project.
- 21.30 The extent of any subsidy should be defined from the start, especially where the publication is designed as a promotional device or is only expected to have a limited circulation. For living artists, catalogues are permanent records of their contributions to a temporary event and of great value to their careers [24]. A catalogue may be equally important for the organiser's own reputation, as a document to place before funders and lenders.
- 21.31 The catalogue for a major exhibition may provide a detailed commentary on the exhibits and an illustrated record which will be of interest even to those who have not visited the exhibition. It is likely to become an important reference document and should continue to sell even after the exhibition has closed. Its true market should be identified and contacted, eg via mail-order to universities and overseas, to reduce warehouse costs. When available to the retail trade, it should appear in the list of books in print published by Whitaker.
- 21.32 Lenders will often wish to promote knowledge of their collections not only through the exhibition but also in the longer term through a publication [4, 24]. A lender's stated requirements on illustrations should be observed. Copyright legislation should also be observed, since a lender may not be the holder of the copyright on the loan. The exhibition, or publication budget may need to include reproduction fees [27].
- 21.33 Designer and printer should be chosen and briefed in good time. The general content and design of the catalogue should be decided with the designer, and several printers should then be invited to submit

estimates. An ISBN number should be printed on the back of the title page (or at the foot of the title page) and at the foot of the outside back cover (and jacket if appropriate) or in some other prominent position on the outside of the publication.

- 21.34 Catalogues should be sent to venues as soon as they are available. They are important publicity aids, and should arrive in time for the venue, if it so wishes, to send out copies to newspaper editors in advance of any press view [20]. The catalogue should be available at the press view. The organiser should state if copies are offered to venues on a firm sales basis or on sale-or-return. The organiser should make transport arrangements and ensure that the venues are aware of these arrangements. The venue should be informed if unsold stock is to be transferred to the next venue, and the organiser must ensure that a system is in place which ensures that the venue is credited for this stock.
- 21.35 As part of the overall evaluation of the showing, each venue should account for total sales and provide a breakdown of sales per visitor, comparing the results with previous figures and noting reasons for better, or worse-than-average results [23]. As far as possible, there should be direct feedback to the organiser from the staff in the sales points in each venue.

Sources of advice and help

- Butler, Tania, 'The Exhibition Catalogue' in Brake, S., (ed), *Circulation and Conservation*, 1990, pp 24-25, Touring Exhibitions Group.
- Keabian, H. and Padgett, W., *Production of museum publications: a step by step guide*, 1990, Gallery Association of New York State, Hamilton (New York).
- The Group for Museum Publishing and Shop Management is the relevant professional membership organisation in the UK.
- A leaflet describing the International Standard Book Numbering (ISBN) procedure is available from the Standard Book Numbering Agency, J Whitaker & Sons Ltd, 12 Dyott Street, London WC1A 1DF.
- The Copyright Act 1956 considers a literary, dramatic or musical work to have been published if multiple copies have been issued to the public, and publishers are required by law to deposit one copy in the British Library within a month of publication.

22 Standards for selling

- 22.1 A touring exhibition can offer retailing possibilities which will provide a service to visitors and generate extra income. Venues should grasp these opportunities early, and should plan for sales points to be fully operational and fully stocked for the whole period of the showing.

The organiser should:

- 22.2 plan for the time and cost of helping venues to exploit opportunities for selling;
- 22.3 draw up a list of products which are relevant to the exhibition, together with sources or suppliers;
- 22.4 give venues this list in good time, so that they can select and obtain relevant stock;
- 22.5 act as a clearing-house for new stock suggestions and for feedback from venues;
- 22.6 provide, as part of a final report on the exhibition overall, an assessment of retailing.

The lender should:

- 22.7 advise the organiser of any publications or other merchandise relevant to the exhibit, together with suppliers;
- 22.8 arrange directly with venues (and other outlets) terms and supplies of any stock it provides;
- 22.9 invoice venues for stock supplied and issue credit notes for unsold material, where appropriate.

The venue should:

- 22.10 advise the organiser on the possibilities for selling;
- 22.11 prepare a budget for the sales operation, if appropriate;
- 22.12 prepare a schedule for the sales operation, if appropriate;
- 22.13 provide staffing for the sales operation, if appropriate;
- 22.14 provide fittings for the sales operation, if appropriate;
- 22.15 provide storage for the sales operation, if appropriate;
- 22.16 arrange onward or return transport of unsold stock, as instructed;
- 22.17 check invoice and credit notes and arrange payment as quickly as possible;
- 22.18 provide the organiser with sales details as part of the overall feedback on the showing.

Guidelines and notes

- 22.19 The organiser should agree a consistent procedure with all venues for any sales of artists' work, if appropriate. This should include methods of payment, VAT, division of commission between organiser and venue, and arrangements for replacing exhibits if sold work can be removed immediately. The contract of sale should include clauses for the artist to borrow for exhibition purposes, and for Droit de Suite [24]. Artists who are lending to the exhibition should be informed of these arrangements.

- 22.20 For other sales, of publications and other merchandise associated with an exhibition, the organiser should be prepared to deal with the franchises which now operate many of the retail outlets in museums and galleries.
- 22.21 Retailing around an exhibition aims to achieve the best balance between demands from the public for souvenirs of their visit and/or further information on the exhibits, and the institution's need to earn income. The latter may be particularly important where admission is free and where the shop is the main source for earned income. Venues have an obligation to the organiser to provide efficient retailing operations where income from sales of catalogues, leaflets, posters, cards and other merchandise are expected to contribute to the cost of the exhibition. Because an incoming exhibition is only at the venue for a short period, retailing arrangements must be in place before the exhibition opens.
- 22.22 Each venue should consider whether anticipated attendances justify a temporary sales point that is larger, more regularly staffed, better equipped and (possibly) closer to the exhibition than the normal sales outlet. A comparison of normal daily attendance with the estimates of possible attendances for the forthcoming exhibition will indicate how far an existing sales point and its staffing will be adequate to cope with extra demands placed on it by the public.
- 22.23 The venue should consider the range and quantity of stock in relation to the numbers and interests of the anticipated visitors. The visitor should be offered a choice beyond the catalogue if there are other publications which complement it. The visitor's choice should not be restricted by cautious ordering of new stock or by the venue giving undue attention to its existing stock.
- 22.24 As part of its research in preparation for the exhibition, the organiser should inform itself about the availability of publications and other merchandise related to the subject. Lenders should inform the organiser if they have suitable merchandise which the venues should know about. Venues may be able to contribute their own suggestions, for which the organiser can act as a clearing-house. Venues should be supplied with information on product, cost and sources, so that they can negotiate terms and arrange deliveries direct with suppliers.
- 22.25 A venue may need to upgrade its procedures to cope with the larger number and wider range of products which must be delivered, stored, documented, invoiced, returned and credited, for an incoming exhibition. Because stock, fittings and staff may all need to be acquired, each venue should consider whether the retailing aspect of a showing requires its own budget and a schedule distinct from those for the exhibition as a whole. Profits from retailing should supplement the institution's budget for the exhibition programme [8].
- 22.26 Each venue should consider the possibilities of using publications and other merchandise for publicity purposes, and should contact libraries, bookshops, building societies, etc about providing stock and arranging displays [20].
- 22.27 Details of the success or otherwise of particular products should be given as soon as possible to the organiser, for passing on in turn to subsequent venues, so that they can adjust levels or displays accordingly. As part of the overall evaluation of the tour, each venue should provide the organiser with an account of total sales. The venue should calculate income per visitor, comparing the results with previous figures and noting reasons for better, or worse-than-average results. It should also provide a breakdown of sales of each product sold, including any catalogue provided by the organiser [21, 23].

Sources of advice and help

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- Bickerton, J., *The handbook of retailing: a guide to retailing for museums, galleries, heritage and visual arts organisations*, 1990, The Museum Development Company, Milton Keynes.
 - Calder, J., (ed), *Museum Publishing: Problems and Potential*, 1988, National Museums of Scotland, Edinburgh.

- Museum Store Association, *The manager's guide: basic guidelines for the new manager*, 1992, The Museum Store Association.
- Theobald, M. M., *Museum store management*, 1991, American Association for State and Local History, Nashville.
- Twelves, M., 'Retailing' in Thompson, J. M. A. et al (eds), *Manual of Curatorship*, 1992, (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.
- The Group for Museum Publishing and Shop Management is the professional membership organisation that is concerned with retailing in museums and galleries. Contact names and addresses of its current officers are to be found in the Museums Yearbook, an annual publication by the Museums Association.

23 Standards for summative evaluation

- 23.1 Summative evaluation tests the effectiveness of an exhibition once installed. It should be designed from the outset as an integral part of the exhibition, and should be carried out to professional standards and consistently across the whole tour. Venues should help to plan and carry out evaluation, and should contribute to the final assessment of the project.

The organiser should:

- 23.2 plan for the time and cost of evaluating the exhibition;
- 23.3 involve venues in evaluation before, during and after the tour;
- 23.4 set up a structure for evaluation that is consistent for all venues;
- 23.5 evaluate the exhibition against its aims and objectives;
- 23.6 provide venues with a copy of any final report evaluating the exhibition;
- 23.7 provide lenders with a copy of this report;
- 23.8 provide funders with a copy of this report.

The lender should:

- 23.9 request a copy of any final report evaluating the exhibition;
- 23.10 note the contribution to the exhibition made by its loan.

The venue should:

- 23.11 plan for the time and cost of evaluating the showing;
- 23.12 inform the organiser of its normal procedures for evaluating exhibitions;
- 23.13 agree with the organiser a method for evaluating the exhibition that is consistent throughout the tour;
- 23.14 evaluate the showing against its aims and objectives for hosting the exhibition;
- 23.15 inform the organiser of the results of its evaluation of its showing.

Guidelines and notes

- 23.16 Market research will help to define types of exhibitions compatible with the aims of the organisation and with the needs of visitors [2]. In planning an exhibition, formative evaluation tests how far a subject and its proposed interpretation meets these needs [5]. Summative or 'ongoing' evaluation tests the effectiveness of the resulting exhibition, so that it can be improved during the tour and so that better exhibitions are possible in future. Organisers and venues should determine which performance indicators and measures are most relevant to the project.
- 23.17 The hire agreement should specify the data; attendance figures, comments, publicity material, press reports and reviews, sales of publications and other merchandise, etc required from each showing [10, 20-22]. This data will indicate the overall appeal of the exhibition, and will help to assess the effectiveness of the marketing strategy [20]. Attendance figures in particular may be important for grant-aid and commercial sponsorship, both present and future. Each venue should have a comments book or other easy-to-use procedure for logging comments on an informal basis, which might be placed

by a statement on the venue's exhibition policy and an outline of the aims and objectives of the exhibition, to provide a framework for feedback on the exhibition itself and for setting out visitors' hopes and expectations for the future [1, 3]. The relevant parts of this book should be copied to the organiser.

- 23.18 Venues should be involved from the outset in any plans for more detailed evaluation, so that feasible and appropriate methods are agreed and so that consistency can be achieved within the staff and resources available at each showing. Evaluation that is consistent throughout a tour will make it easier to pinpoint the exhibition's strengths and weaknesses. Consistency will also allow comparisons between venues with different resources and visitors. Organiser and venue should agree what additions might be permitted to a showing, and should assess the effectiveness of these extra items as part of the overall evaluation of the showing [10].
- 23.19 Evaluation should be planned and budgeted as an integral part of the tour, taking into account the needs and concerns of any funders and the total resources available. Touring exhibitions are opportunities for evaluation, allowing venues to learn through the direct experience of different methods of testing visitor response. Evaluation whose costs are shared between all the showings can help a venue to get a rare insight into its visitors, to identify elements exerting a negative influence, and to develop other aspects which exert a positive influence. A venue can also use the information gathered to find out how its other displays and services are viewed, and to make an argument to its funding authority for more regular sampling of its visitors.
- 23.20 Methods can include tracking, open-ended interviews and focus groups. Quantitative surveys can ascertain where visitors came from and the reasons for their visit. Qualitative surveys can assess whether the exhibition experience meets the visitors' expectations and how it might be improved, or (outside the institution) to discover why people did not visit and what might change their minds in future.
- 23.21 Evaluation can be useful for improving the exhibition during a tour. Where audiences are comparable, the experience learnt at one showing might lead to installing the exhibition in a different way, introducing different material or otherwise redesigning the display to make the exhibition more effective.
- 23.22 The organiser should gather together detailed feedback from all the venues at the end of the tour, and should produce a report which compares actual results with the exhibition's declared aims and objectives. This evaluation will help to guide the organiser when developing future exhibitions. Venues should also be provided with copies of the final report, to help them to appreciate their contribution to the overall achievement, and to help them when using exhibitions in future. The report should also be sent to lenders and funders, so that they have an account of the effectiveness of their help [9, 24].

Sources of advice and help

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- Bicknell, S. and Farmelo G., (eds), *Museum Visitor Studies in the 90s*, 1993, Science Museum, London.
 - Griggs, S., 'Evaluating Museum Displays', 1985, *CAMC Factsheet*, Committee of Area Museum Councils.
 - Hyde, S. and Smith, G., 'Quizzing Conventions' in *Museums Journal*, February 1992, pp 35-37.
 - McManus, P., 'Do you get my meaning? Perception, Ambiguity and the Museum Visitor' in *ILVS Review*, International Laboratory for Visitor Studies, 1988.
 - Miles, R., *The Design of Educational Exhibits*, 1988, Unwin Hyman, London.
 - Prince, D. R., 'Approaches to summative evaluation' in Thompson, J. M. A. et al (eds), *Manual of Curatorship*, 1992, (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.

24 Standards for borrowing and lending

- 24.1 The organiser should apply for loans, and lenders should respond to requests, as early as possible. The same professionalism should be applied to exhibits from individuals and small institutions as to material from major collections. The use of an artist's intellectual property and the artist's right of recompense for services should be respected. A loan agreement should set out what lender and organiser agree to do.

The organiser should:

- 24.2 allow for the time and cost of borrowing exhibits;
- 24.3 see potential exhibits before they are requested;
- 24.4 make formal application to the owner or the appropriate representative of an institution;
- 24.5 set out the aims and objectives of the exhibition, when making a loan request;
- 24.6 outline the proposed tour, providing details of venues when known, when making a loan request;
- 24.7 set out a level of care, when making a loan request;
- 24.8 indicate publishing plans, when making a loan request;
- 24.9 assess the resource implications of any conditions made by a lender;
- 24.10 assess other resource implications;
- 24.11 inform a lender immediately if a loan request has to be withdrawn;
- 24.12 accept the loan, and any conditions attached to it, in writing;
- 24.13 incorporate any loan conditions in its requirements to the venues, when confirming showings;
- 24.14 advise lenders of confirmed showings;
- 24.15 advise private lenders about the restrictions that govern public exhibition, as appropriate;
- 24.16 advise lenders of facilities at the venues, as appropriate;
- 24.17 advise lenders of any action by the venues to meet loan conditions, as appropriate;
- 24.18 observe the terms of the loan agreement throughout the tour;
- 24.19 ensure that loan conditions are observed throughout the tour;
- 24.20 move any exhibit or withdraw it from display only with the prior agreement of the lender;
- 24.21 inform lenders of any major changes.

The lender should:

- 24.22 keep all loan procedures as straightforward as possible;
- 24.23 provide general conditions of loan immediately in response to enquiries;
- 24.24 respond promptly to loan requests;
- 24.25 inform the organiser immediately if any exhibit cannot be lent;
- 24.26 indicate any special conditions for a loan or requirements for the tour;
- 24.27 consider sympathetically the organiser's proposals for satisfying these conditions or requirements;
- 24.28 obtain the governing body's agreement to lend, if appropriate, once conditions have been met;
- 24.29 confirm the loan;
- 24.30 confirm legal title to the exhibit;
- 29.31 observe the terms of the loan agreement;
- 24.32 respect the policies and premises of organiser and venues;
- 24.33 respect the rules governing public exhibition;
- 22.34 advise the organiser of controversial items and possible censorship issues;
- 24.35 withdraw the loan only in exceptional circumstances.

The venue should:

- 24.36 discuss loan conditions at an early stage with the organiser, and with lenders where appropriate;
- 24.37 assess the resource implications of meeting these conditions, and secure extra resources where necessary;
- 24.38 inform the organiser immediately if any loan conditions cannot be met;
- 24.39 confirm in writing its agreement to the loan conditions;
- 24.40 observe these conditions;
- 24.41 identify and prepare for controversial items and possible censorship issues;
- 24.42 move any exhibit or withdraw it from display only with prior agreement from the organiser;
- 24.43 inform the organiser of any change in status of the exhibit;
- 24.44 inform the organiser of any change in the showing.

Guidelines and notes

- 24.45 Where possible, the organiser should see the exhibit before it is requested, to check its suitability for the subject or theme of the exhibition, and to assess the resource implications of a loan [4]. Such a visit will help to establish the exhibit's condition and any special packing or conservation work that may be required [25]. It will also establish the exhibit's precise location, restricted openings or sharp corners on the route out of the building, and the difficulty and cost of collecting (and returning) the exhibit [4].
- 24.46 The organiser should make preliminary enquiries of potential lenders as soon as possible. An informal contact can ascertain to whom application should be made; actual owners may be different from the institution currently displaying the exhibit, and applications may need to be addressed to the director or a department in a large museum. An informal contact can also establish if the exhibit is available for the required period, and can propose alternatives if it is not. An informal contact can establish whether lenders demand a specified period of notice, expect loan forms or facilities reports to be completed or need security clearance from the Museums Security Adviser [34, 35]. It can discover any restrictions on the length of a loan or on the number of venues permitted.
- 24.47 The organiser should make a formal application well before any minimum notice stipulated by a lender. An institution may have to obtain agreement to lend from a governing body, and will wish to fit in all necessary administration and conservation work. Where requests make unrealistic demands on its collections or on its staff, it may decline to lend or may reduce the number of exhibits it is prepared to lend. Where possible, the tour should be defined and venues agreed before a loan is requested. Security checks or indemnity cover may not be arranged in time, if a decision to tour is delayed, if booking periods are unfilled or if the original tour is extended. Although private lenders or smaller collections may not specify a period of notice, the organiser should allow for the time and cost of arranging photography, conservation and preparation, and for establishing insurance values. Requests to foreign lenders should be translated into the lender's language.
- 24.48 A museum or other public institution which lends regularly should have a written loans policy with a presumption in favour of lending material for public exhibition. Loans put exhibits at extra risk of physical damage and theft. A lender may reduce risks to a level it can accept by specifying conditions and requirements to which an organiser should agree in writing, setting out proposed means of doing so where appropriate. Lenders may insist on couriers or approved carriers, particular display or handling arrangements and security or environmental controls [15, 16, 28, 32, 33, 35].
- 24.49 For public institutions in particular, risk will also be assessed against public benefit. Exhibitions are opportunities to promote knowledge of their collections and to increase access to material in reserve or research collections. The organiser should set out clearly to potential lenders the theme or subject, the basis of the selection, the objectives of the exhibition, the part which the lender's exhibit will play, and a list of other exhibits requested [3]. Loans succeed when they reconcile the needs, expectations and aspirations of the organiser and the lenders. Important material will not be lent for trivial purposes, but a lender should not automatically rule out approaches or attitudes which are different from its own policy or specialisation [4].
- 24.50 Lenders will specify the form of acknowledgement to themselves, and to any donor where appropriate. The organiser should indicate if the exhibit is likely to be mentioned or documented in a proposed catalogue or other publication. Publications and other merchandise, which have a life after the exhibition and may be distributed more widely, can help to further knowledge of the lender's collection [21].
- 24.51 The lending process gives opportunities for collaboration and learning between colleagues sharing common aims. Major institutions, such as the national and larger regional museums and galleries, lend frequently and often set the agenda for borrowers by defining precise conditions and procedures for their loans. A lender may send a loan form, a copy of its loans policy, its standard conditions and copies

of a facilities report. Forms should be concise and straightforward. A regular lender will normally keep a register of its borrowers to record standard information and how well conditions were observed [6].

- 24.52 Artists and private lenders may have different standards from those used by a public institution, but the latter should make every effort nonetheless to ensure the safety and integrity of an exhibit by offering the same level of protection as for a public collection. The organiser should explain any preventive measures, which the lender should agree before work begins [25]. The lender's agreement should also be obtained if the exhibit is to be remounted or reframed, and a decision made on whether it should be returned to its original frame or other support at the end of the tour. In the absence of the lender prescribing conditions, the organiser should volunteer the principles which will be applied throughout the tour. The lender should be clear about the organiser's ethical position and the reasons for any measures to protect the exhibit.
- 24.53 Museums and galleries should recognise the professional status and creative contribution of artists, who have a different status from other lenders because their intellectual (as well as personal) property is being used, because their work is a potential source of income, and because they have a professional interest in the exhibition medium. Artists may have strong expectations about the contexts in which their work is shown, but are less likely to question an approach different from their own experience or preferences, if the organiser acts professionally, if they understand the restrictions that govern public exhibitions, and if they are convinced of the seriousness of the proposed exhibition [3]. The exhibitions policy should define the institution's attitude to living artists [1]. Borrowing from artists raises other issues. The artist's duty to act professionally in dealings with galleries and other borrowers is covered in the National Artists' Association's 'Code of Practice for the Visual Arts'.
- 24.54 For any other loan, the organiser should be satisfied that a lender has legal title. Museum exhibits should have been acquired in accordance with professional practice, as set out in the Museums & Galleries Commission's Guidelines for a Registration Scheme for Museums in the United Kingdom. Exhibits in private ownership should have a written contract or bill of sale and details of provenance. Exhibits should have been acquired in accordance with national laws and international conventions (eg those concerning firearms or protecting wildlife), and with any local licences and bye-laws. The lender should specify the ownership of copyright [27].
- 24.55 If the lender decides that it cannot lend an exhibit, it should inform the organiser as quickly as possible. If the organiser decides that it cannot take up a loan, it should inform the lender immediately that the request has been withdrawn, so that work being carried out in preparation for the loan can be suspended. In both cases, reasons should be given in writing. A regular lender's register of the institutions to which it has lent material will also include those where it has refused loans, with notes of problems and difficulties [6].
- 24.56 A loan agreement may be an exchange of letters or a standard form provided by the lender, completed by the organiser and signed by their chief executives. The formal agreement should set out what the two parties each agree to do, and should contain any general and specific conditions. A single exhibition might use several formats of loan agreement, since regular lenders will have their own loan forms, as will the organiser. In the interests of efficiency and the safety of the exhibits, such forms should ask similar questions and be reasonably consistent in format.
- 24.57 Agreements with artists are frequently preceded by provisional agreement, which should indicate the date by which a detailed contract can be completed. When accepting this provisional offer, the artist should give the organiser first option on completed and planned work, to avoid conflict if the artist is invited to exhibit elsewhere. The contract or firm agreement should be completed as soon as dates, fees and areas of responsibility have been established. Where artists are commissioned to produce work especially for an exhibition, the contract should state as clearly as possible the organiser's intentions

and expectations. The artist should keep the organiser informed about work in progress and should allow reasonable access.

- 24.58 Artists should be paid for making their work available for public exhibition, especially where they are contributing a major part of their capital over an extended period. As part of professional practice, museums and galleries should uphold the principle of the Exhibition Payment Right, which should be distinguished from expenses for framing or transport incurred by the artist and re-charged to the organiser and from fees for artist-in-residence projects, workshops, lectures or any further work in connection with the exhibition [12].
- 24.59 The organiser should make in good time, and the lender should respond promptly to, requests for information for transport and catalogue purposes [21, 32]. Valuations should be agreed, and the organiser should notify the lender when it has arranged insurance or indemnity cover for the loan [26]. The lender should arrange, or allow the organiser to arrange, photography of the exhibit, whether to be used for any publication or for recording its condition [21, 27, 29]. Extra time should be allowed for smaller collections and private lenders, who may not be geared up to supply insurance valuations or photographs quickly.
- 24.60 The organiser should make all arrangements for collecting and returning the exhibit [32]. A conservator may recommend measures for the safe transfer of the exhibit to the organiser's premises.
- 24.61 Where a lender wishes to show unglazed exhibits on open display or in high light-levels, the organiser should point out that conditions which may be better for visitors are less than ideal for protecting the exhibits. The organiser should offer the same level of protection that a public collection would expect, and point out any implications for insurance [26]. The condition of other exhibits should not be prejudiced. Venues must be informed of these arrangements.
- 24.62 Exhibition spaces and policies will vary from venue to venue, and exhibits may be omitted from some showings for reasons of space, security or sensitivity towards controversial material. The organiser should inform the lender if a exhibit is not to be installed. Except for an emergency, the venue should not move an exhibit or withdraw it from display without prior agreement from the organiser [3, 39]. Reasons should be given, so that the withdrawal is not construed as censorship or breach of contract. Where exhibits are not displayed, the venue should provide appropriate storage conditions and confirm these conditions with the lender, to avoid the expense and risk associated with an additional move [31].
- 24.63 The lender should be informed promptly and in writing about any damage, attempted theft or other change in the status of the exhibit [29, 34, 39]. Lenders should also be given full details of the addresses, dates and times of each showing, with any temporary closure, subsequent alterations in dates or other changes in the tour arrangements. The organiser should keep all confidential details of lenders, addresses and valuations secure, but should supply each venue with the names and addresses of all lenders who do not wish to remain anonymous, so that they can be sent press releases, invitations to exhibition openings and associated events [6, 20, 26]. Lenders should be sent copies of the final evaluation of the tour, so that they have an account of the effectiveness of their help [23].
- 24.64 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

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- Corner, L., *Code of Practice for the Visual Arts*, 1994, National Artists' Association.
 - Merritt, E., 'Trust or Verify: conditions on outgoing loans', in *Collection Forum*, 1992.
 - 'Perils of Borrowing', in *Museums Journal*, April 1993.

- The Crafts Council, Arts Councils and Regional Arts Boards and their specialist officers can provide advice on working with artists and craftspeople. Most RABs hold slide registers of artists and crafts people in their areas, and the Crafts Council's information service is also valuable. Guidelines for the use of craft in museums is available from the South East Arts Board or the Southern Arts Board.
- Advice can be found in Artists' Newsletter and AN Publications. In particular the NAA Public Exhibition Contract by Richard Padwick provides a model agreement between artist and organiser, AN Publications, PO Box 23, Sunderland SR4 6DG.

25 Standards for conservation of loans

- 25.1 Remedial conservation is normally the responsibility of the lender, but the organiser should pay for work which cannot be undertaken as part of a lender's ongoing conservation programme. The organiser is normally responsible for the costs of any preventive measures necessary for the tour.

The organiser should:

- 25.2 give lenders adequate notice so that remedial conservation and preventive measures can be carried out;
- 25.3 arrange for any remedial conservation that the lender cannot carry out;
- 25.4 budget for the costs of any remedial work that the lender cannot afford;
- 25.5 arrange for any preventive measures that the lender cannot carry out;
- 25.6 budget for the costs of any preventive measures.

The lender should:

- 25.7 assess the condition of each exhibit requested for loan;
- 25.8 advise the organiser of the work and time needed for any remedial conservation;
- 25.9 advise the organiser of the cost of any remedial conservation that cannot be carried out internally;
- 25.10 authorise any remedial conservation;
- 25.11 advise the organiser of the time and cost of carrying out preventive measures;
- 25.12 authorise preventive measures;
- 25.13 provide the organiser with appropriate instructions or training for the day-to-day care of the exhibit.

The venue should:

- 25.14 observe the organiser's instructions or training for the day-to-day care of the exhibits.

Guidelines and notes

- 25.15 This section is principally concerned with preparing an exhibit for loan, but also applies to any remedial work that may be required during the tour [29]. In consultation with a conservator, a lender should assess the condition of an exhibit and decide if it can be included in the touring exhibition for which a loan is requested.
- 25.16 Public collections normally have a programme of conservation and curatorial care, based on the condition of their collections and their own research and display priorities. A public collection should normally pay for any urgent remedial work. However, the organiser should cover the costs of remedial work if a loan application is not made in good time, if the lender's in-house conservation programme is already full, and if the work must be undertaken by an external conservator.

- 25.17 The organiser should expect to cover the cost of conservation work for loans from smaller institutions and private lenders. Private lenders may lend without taking the condition of the exhibit fully into account. Once a loan has been agreed in principle, the status of the exhibit and the conditions in which it is kept should be checked, if possible by a conservator before collection [24]. If the exhibit is unfit to travel, the organiser should inform the lender, appending a formal report which includes recommendations for conservation and for the future safety of the work. A conservator should advise on any preventive measures which might be needed before an exhibit is sent on tour [16, 30]. The lender should agree such preventive measures before work begins.
- 25.18 The investigation and treatment undertaken by a conservator will include advice on its immediate conservation requirements and on appropriate conditions for its subsequent display [14]. The documentation on the exhibit should include not only a record of its condition as it leaves the lender, but also a short summary of the environmental conditions which lender and venues alike should achieve for that exhibit [6, 35]. Such conditions are often a requirement for cover under the Government Indemnity Scheme [26]. The lender should provide a certificate of fumigation in cases where an exhibit may contain infestation that could threaten the safety of other exhibits whilst on loan [36].
- 25.19 The lender may specify, as part of the loan agreement, the environmental conditions needed to maintain the exhibit in a stable condition. The organiser should be responsible for the costs of any preventive measures that are needed to protect the exhibit on tour but are not required for the lender's own displays. These measures might include work before the exhibit leaves the lender's premises, eg where frames have to be glazed and backed, exhibits remounted or new transit crates made [16, 30]. Preventive measures should be an important part of the organiser's design and preparation of the exhibition, eg lighting, display cases and other display furniture [15, 17]. They should also be an important part of instructions to carriers and venues with regard to handling, packing, transport and storage [28, 31, 32].
- 25.20 The organiser should set up a condition check procedure and agree with lenders whether formal arrangements are necessary for the exhibition to be inspected regularly by a conservator experienced in the material on display [29]. The organiser should give venues appropriate instructions or training for the day-to-day care of the exhibition. They should monitor continuously the security and environment of the exhibition, and should have a procedure for reporting damage [34, 39].
- 25.21 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Cassar, M., *Environmental Management: Guidelines for Museums and Galleries*, 1993, Museums & Galleries Commission, London.
- The Conservation Unit of the Museums & Galleries Commission (16 Queen Anne's Gate, London SW1H 9AA) maintains a Register of qualified and experienced conservators. It also publishes a leaflet, 'How to Choose a Conservator or Restorer'.
- A similar service is provided in Scotland by the Scottish Conservation Bureau of Historic Scotland (Stenhouse Conservation Centre, 3 Stenhouse Mill Lane, Edinburgh EH11 3LR).
- Area Museums Councils and Countywide Consultative Committees will be able to advise smaller museums about local specialist staff who may be able to undertake inspections.

- The United Kingdom Institute for Conservation (UKIC, 37 Upper Addison Gardens, Holland Park, London W14 8AJ) is the professional body for conservators in the United Kingdom. It has a Code of Ethics which all practising members agree to abide by, and it also produces *Guidance for Conservation Practice*.

- Other organisations which are involved in conservation are the Scottish Society for Conservation and Restoration (The Glasite Meeting House, 33 Barony Street, Edinburgh EH3 6NX) and the Irish Professional Conservators' and Restorers' Association (c/o National Gallery of Ireland, Merrion Square West, Dublin 2).

26 Standards for insurance and indemnity

- 26.1 All owners should be indemnified against damage or loss when they lend to a public exhibition. Organiser, owners, venues and insurers should agree valuations, based on current open market values. Duration of cover should include periods of transport and storage. Unless venues are informed otherwise, each showing of a touring exhibition should be subject to separate insurance or indemnity cover.

The organiser should:

- 26.2 agree a valuation for each exhibit with the lender or owner;
- 26.3 arrange insurance or indemnity for its own showing, acceptable to the lender or owner;
- 26.4 define the period of insurance or indemnity cover for its own showing, including storage and transit;
- 26.5 provide all required information in good time to insurers or those responsible for indemnity;
- 26.6 agree to the general terms of insurance or indemnity, confirming responsibility for any minimum liability;
- 26.7 keep details of valuations secure and confidential;
- 26.8 provide venues with sufficient information on the exhibits to enable them to arrange insurance or indemnity cover;
- 26.9 request a copy of each venue's insurance policy or indemnity certificate;
- 26.10 provide lenders or owners with copies of insurance policies or indemnity certificates, if requested;
- 26.11 notify the lender, owner (if applicable) and insurer of any change in an exhibit's status.

The lender should:

- 26.12 put the organiser in contact with the owner, if the lender does not own the exhibit;
- 26.13 agree with the organiser a valuation for each exhibit the lender owns;
- 26.14 satisfy itself that the insurance or indemnity cover arranged by organiser and venues is adequate.

The venue should:

- 26.15 arrange insurance or indemnity for its showing which is acceptable to the owner, unless otherwise informed;
- 26.16 agree with the organiser the duration of insurance or indemnity cover;
- 26.17 obtain from the organiser information about the exhibits sufficient to arrange insurance or indemnity cover;

- 26.18 provide all required information in good time to insurers or those responsible for indemnity;
- 26.19 agree to the general terms of insurance or indemnity, confirming its responsibility for any minimum liability;
- 26.20 provide the organiser, if required, with a copy of the insurance policy or indemnity certificate;
- 26.21 notify the organiser, lender and/or owner and insurer immediately if an exhibit sustains damage or is lost or stolen.

Guidelines and notes

- 26.22 Insurance or indemnity arrangements must be negotiated in good time. Applications for government indemnities specify a minimum notice before cover is required, and a venue may need even more time to negotiate funding, increase its staff or carry out improvements to the building. Duration of cover should include periods of transport and storage. Insurance is usually arranged 'nail to nail' or 'shelf to shelf', to ensure that there are no gaps in cover. Venues should be advised where a lender or those responsible for indemnity arrangements require changes in supervision or other protection which might have administrative or financial consequences [10].
- 26.23 Where the primary purpose of the exhibition is educational, all owners should be offered financial compensation in the event of damage or loss. Where sales are permitted from exhibitions of work by living artists, this possible additional benefit should not be an excuse for not insuring or indemnifying exhibits which have been borrowed for public benefit [24].
- 26.24 Each venue in a tour should expect to arrange its own insurance or indemnity cover. The organiser should advise if it provides cover. A venue should supply a copy of the insurance policy to the organiser, who should enclose a copy of the certificate or give the name and address of the insurance company, the policy number and the effective dates, when returning the loan agreement to the lender [24]. The organiser should be prepared to translate these details if necessary.
- 26.25 Insurance or indemnity cover will be affected by the degree of protection provided by the building and its staff. The recommendations of recognised fire and security advisers should be implemented, but the venue should also assess the risk for every incoming exhibition, taking into account the nature and value of the exhibits and how loss or damage may occur [34]. Risks are identified so that they can be avoided or reduced and so that insurance can be obtained at better terms.
- 26.26 Under the terms of the National Heritage Act 1980, museums, galleries, and libraries funded by local authorities or universities and the National Trust are automatically eligible for Government Indemnity. Approval for other institutions (eg independent museums) is subject to an annual review of their constitutions and audited accounts. Eligibility or approval does not mean that indemnity is granted automatically; an application must be made.
- 26.27 A separate risk assessment will be undertaken when a Government Indemnity is requested. Indemnity may only be granted subject to additional conditions that give extra protection and help to ensure that the indemnity is not called upon. Although an organiser may use commercial insurance, one or more of its venues may apply for Government Indemnity, and the organiser should be ready to supply on request photographs and other information to help such applications.
- 26.28 Full commercial insurance may not be required in respect of loans from national museums, galleries and other bodies funded by government. Non-national borrowers should contact the Registrar of each body from whom a loan is sought, providing the necessary information on security and other measures.

- 26.29 Applications for indemnity cover with regard to loans from museums, galleries and other bodies not directly funded by government, should be sent to the Museums & Galleries Commission which administers the Government Indemnity Scheme on behalf of the Department of National Heritage, the Welsh Office, the Scottish Office Education Department and the Department of Education, Northern Ireland.
- 26.30 Owner and organiser should agree a valuation before finalising a loan. Valuations should be based on a reasonable estimate of the price the exhibit would realise if sold on the open market. Evidence of the source and basis of valuation may be required in applications for indemnities. Additional 'top up' insurance may be necessary, if an expert adviser suggests an indemnity lower than the valuation. Valuations can change even during the period of a tour, and insurance cover should be kept up to date.
- 26.31 The insurance policy or indemnity certificate should provide for the coverage of the declared value in the event of total loss. In the event of partial loss or damage, the policy or indemnity may provide for the cost of replacing or repairing the loan plus depreciation. Claims in respect of overseas loans should be settled in the currency of the country in which the owner resides, as specified on the loan form.
- 26.32 An artist or other lender who requires its loans to be displayed in conditions contrary to normal conservation practice may not be eligible for normal insurance cover or Government Indemnity, and should be asked to sign a form of waiver against liability on the part of the institution or its insurer for any damage sustained [24].
- 26.33 Museum and gallery premises should be used only for specified purposes. The use of premises for private views should specify the areas to which smoking and drinking are restricted. Any public functions or social lettings should be covered by special risk insurance.
- 26.32 Each venue should brief its staff on internal procedures for reporting any damage or loss [34, 39]. It should inform the organiser, lender, owner (if different), and insurer or (in the case of Government Indemnity) the Museums & Galleries Commission's Museums Security Adviser if an exhibit sustains damage or is lost or stolen.

Sources of advice and help

- Committee of Area Museum Councils, *Museum Insurances*, 1994. (Available in photocopy from the individual Area Museum Councils.)
- Mitchell, R., *Insurance for Independent Museums*, 1988, Association of Independent Museums.
- Advice on the Government Indemnity Scheme is available from the Museums & Galleries Commission.

27 Standards for copying and reproduction

- 27.1 Lenders, artists and photographers should be acknowledged in all forms of reproduction. Permission to copy should be sought from the owner of the copyright, and moral rights should also be respected. Permission to use a photograph should be sought if it has a separate copyright.

The organiser should:

- 27.2 request photographs from the lender as soon as possible;
- 27.3 identify the owner of the copyright for any photograph supplied by the lender;
- 27.4 identify the owner, if appropriate, of the copyright of the exhibit;
- 27.5 arrange for photography if necessary;
- 27.6 ascertain from the owner(s) of the copyright the circumstances in which the loan may be reproduced;
- 27.7 inform the venues of any restrictions on the use of photographs supplied;
- 27.8 inform the venues of any restrictions on photography and filming during their showings.

The lender should:

- 27.9 make available on request and at cost existing or new photographs;
- 27.10 inform the organiser where appropriate of the owner of the copyright for each exhibit loaned;
- 27.11 inform the organiser of the name and address of the owner of the copyright of any photograph it supplies of any exhibit;
- 27.12 specify the occasions the exhibit may be reproduced, where it owns a copyright;
- 27.13 specify any special requirements for photography and filming;
- 27.14 provide the wording for acknowledgements, to lender, artist and photographer as appropriate.

The venue should:

- 27.15 abide by the organiser's restrictions on the circumstances in which the exhibit may be reproduced;
- 27.16 observe the organiser's restrictions on photography and filming;
- 27.17 observe reproduction and copyright laws.

Guidelines and notes

- 27.18 The organiser should request any photographs or transparencies as soon as possible so that any new photography can be arranged. The organiser should state the purpose of the photographs, eg research,

documentation, reproduction. The organiser should state the type and purpose of any reproduction, the number of copies proposed and the extent of the distribution envisaged [21].

- 27.19 The lender should label any photograph it supplies with a caption including the full title and the wording of acknowledgement to the lender. The lender should also provide suitable credit to any artist or photographer who has a moral right to such a credit. The lender should distinguish exhibits and photographs with the copyright symbol in front of the name of the owner of the copyright of the exhibit and the date it was made. Photographs supplied by the lender should also be marked with the copyright symbol before the name of the owner of the copyright of the photograph and the date of its first publication.
- 27.20 The organiser should have a licence or written consent from the owner of the copyright to cover the form of the reproduction, number of copies, purpose, duration of permission, extent of distribution, form of acknowledgement and any fee payable. A venue that consciously uses material for which the consent of the copyright owner has not been obtained is committing an infringement and is liable to prosecution. Sound recordings should also be treated as separate copyright properties when used in film, video and tape-slide sequences [18]. Permission should be obtained from the copyright holder, normally the person who made the arrangements for the recording.
- 27.21 Provided copyright is not infringed, a lender may permit photography as long as the exhibit is not handled nor the case or frame opened. It may require special permission for filming which involves more than normal electronic flash. However, to protect the exhibit from unauthorised commercial exploitation once it has left its premises, a lender will often place restrictions on photography and filming. Venues should then make restrictions on copying, photography, filming etc a condition of entry, because the copyright legislation in the UK does not prohibit a visitor from drawing, photographing or filming an exhibit in an exhibition open to the public.
- 27.22 Organiser and venues should have a written agreement with publishers relating to the use of any photographs taken by the latter. A magazine with a photographer on its full-time staff will own the copyright, and may use its copy without control or recompense unless a licensing arrangement is agreed.
- 27.23 Lighting and other equipment must be kept clear of exhibits to avoid accidental damage. The use of high-powered lighting especially for filming must be closely supervised and controlled to avoid a build-up of heat and an unacceptable dosage of light [15].

Sources of advice and help

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- Greenwood, Sarah and Hudson, Norman, *Film and Photography for Historic Houses and Gardens*, Historic Houses Association.
 - Malaro, M. C., *A legal primer on managing museum collections*, 1985, Smithsonian Institution Press, Washington.
 - Miller, R., *Copyright: Protection, use and responsibilities*, 1991, AN Publications Sunderland. See in particular its useful 'Checklist for a non-exclusive licence' on pages 53-54, with further notes on types of payment on pages 58-60.
 - The Museums Association, 'Copyright for Museums', *Museums Briefing No 6*, 1994, Museums Association.
 - In the UK, copyright is protected by the Copyright, Design and Patents Act 1956 and Copyright, Design and Patents Act 1988. The 1988 Act introduced several new elements, including the concept of moral rights (the way that a work of art is treated and whether authorship is acknowledged). It brought photographs and portraits within the general definition of works of artistic craftsmanship.

The 1988 Act also protects the privacy of photographs and films which were commissioned for private and domestic purposes and which cannot be shown in public without the permission of the commissioner.

- Design and Artists Copyright Society (DACS) Ltd, St Mary's Clergy House, 2 Whitechurch Lane, London E1 7QR. DACS is the copyright collecting society in the UK for the visual arts, looking after the copyright interests of its members, collecting fees and pursuing infringements. It licenses reproduction and collects fees which are based on a published tariff. It also has reciprocal agreements with other copyright societies, to ensure that works are not reproduced without permission outside the country in which they were made.

- For sound recordings, contact the headquarters of the Performing Right Society, (29-33 Berners Street, London W1P 4AA), the Mechanical Copyright Protection Society (41 Streatham High Road, London SW16 1ER) and Phonograph Performance Limited (14 Ganton Street, London W1V 1LB).

28 Standards for handling

- 28.1 Exhibits should only be handled and moved when necessary. They should be given the most support and the least stress. The safety of the handler should also be considered. Lenders should specify if only their representatives or nominees are allowed to handle their exhibits. When agreeing to these conditions, organisers should ensure that the venues will also observe them.

The organiser should:

- 28.2 allow time and money to develop procedures to minimise the handling and movement of exhibits at each venue;
- 28.3 determine the appropriate method of handling each exhibit, in consultation with the lender;
- 28.4 agree with the lender who is allowed to handle each exhibit;
- 28.5 assess each venue's expertise in handling;
- 28.6 train nominated staff or provide them with written instructions to handle the exhibits;
- 28.7 advise venues of the number of experienced staff required for the safe handling and movement of an exhibit;
- 28.8 require the use of supports and protection appropriate to an exhibit's vulnerability;
- 28.9 advise venues of equipment suitable for the safe handling and movement of the exhibits;
- 28.10 advise venues of the space and time to set aside for the safe handling and movement of exhibits;
- 28.11 help each venue to keep the movement and handling of exhibits to a minimum;
- 28.12 satisfy itself of the venues' procedures for recording the movement and eventual location of exhibits.

The lender should:

- 28.13 brief the organiser on the appropriate method of handling the exhibit;
- 28.14 agree with the organiser who is allowed to handle the exhibit;
- 28.15 advise the organiser of the number of experienced staff required for the safe handling and movement of the exhibit;
- 28.16 require the use of supports and protection appropriate to the exhibit's vulnerability;
- 28.17 advise the organiser of equipment suitable for the safe handling and movement of the exhibit;
- 28.18 advise the organiser of the space and time to set aside for the safe handling and movement of the exhibit;
- 28.19 advise the organiser of any other precaution to minimise handling during a tour;

The venue should:

- 28.20 plan time and space for handling the exhibits safely;
- 28.21 nominate a member of staff to supervise handling and to record movement;
- 28.22 advise the organiser of its expertise in handling;
- 28.23 observe the organiser's stipulations on who is allowed to handle each exhibit;
- 28.24 provide the required number of experienced staff;
- 28.25 brief nominated staff on handling the exhibits;
- 28.26 use supports and protection appropriate to an exhibit's vulnerability;
- 28.27 obtain and use the recommended equipment;
- 28.28 set aside sufficient space and time for the safe handling and movement of exhibits;
- 28.29 plan routes when exhibits have to be moved;
- 28.30 record the movement and eventual location of exhibits.

Guidelines and notes

- 28.31 Venues should observe any condition laid down by a lender that only its representative is allowed to handle its exhibit [24]. If staff other than the lender's representatives are permitted to handle exhibits during the installation and dismantling of an exhibition, the organiser should agree with each venue who these people are. The organiser should brief any specialist packer at the time that services are contracted.
- 28.32 Normally the organiser will supervise installation and dismantling or will provide training or instructions both on the appropriate method and the amount of handling permissible for each exhibit [10]. The organiser should specify whether gloves are to be worn, and of what type. Instruction manuals, transport manifests and tour inventories can help to plan unpacking and installation and keep handling and moving exhibits to a minimum [6]. The condition of each exhibit should be checked before it is moved [29].
- 28.33 Staff should be trained in handling and moving different types of exhibit, so that they are aware of the potential risks and dangers both to the exhibits and display materials and to themselves, and so that the exhibits are handled carefully. Even exhibits which are apparently robust should be protected from accidental damage, sudden shocks or excessive vibration and from physical damage from tools, equipment or hard objects used or worn by the handler.
- 28.34 Before an exhibit is moved, a route should be planned and prepared, and a clear area should be made ready to receive it. Floor loadings should be checked if necessary. Exhibits should not be allowed into the exhibition areas whilst carpentry, electrical work and painting are going on, and they should not be installed until paints and glues have dried and the display cases and other furniture are fully ready [16, 17]. Some lenders specify that their exhibits should be the last objects to be placed in a display case, so all fittings and labels must be ready beforehand.
- 28.35 The venue should plan to minimise the number of moves. Exhibits should be moved as close as possible to their final position before being unpacked. Moves from one part of a building to another

should always be recorded, and each venue should have a standard procedure for recording the location of exhibits [6]. Staff should be familiar with procedures in the event of an emergency [39]. Public galleries should be closed to visitors when exhibits are moved through them. Access should be restricted to the exhibition area during installation, and adequate patrolling should be provided [34].

- 28.36 Exhibits should be properly supported when being handled or moved, using the carrying frames or crates or on the pallets provided by the organiser. Suitable lifting and moving equipment should be provided to ensure that no one lifts, carries or moves any load which is so heavy or bulky as to risk causing injury or damage. The venue should abide by health and safety regulations, which will vary from country to country.
- 28.37 The organiser should agree with lender and venues any methods of fixing or holding an exhibit in place. Fixings which have been removed with the lender's permission (eg. hanging fittings on frames) should be retained and replaced at the end of the showing or tour [17].
- 28.38 The organiser should identify which exhibits, if any, might be handled or touched by the public, and provide instructions on how these should be displayed, advertised and supervised.
- 28.39 Standards and advice in this section are expanded in the booklets in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*, particularly in Section 18 of *Standards in the Museum Care of Larger & Working Objects: Social and Industrial History Collections*, 1994, Museums & Galleries Commission, London.

Sources of advice and help

- British Museum, *A Guide to the Storage, Exhibition and Handling of Antiquities, Ethnographia and Pictorial Art*, 1990 (2nd edition), British Museum Publications, London.
- Miles, G., 'Object handling' in Thompson J. M. A. et al (eds), *Manual of Curatorship*, 1992 (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.
- Shelley, M., *The Care and Handling of Art Objects*, 1987, Metropolitan Museum of Art, New York.
- Sitwell, C., *Packing and Handling Works of Art*, 1989, Touring Exhibitions Group.
- Stollow, N., 'Preparation and handling', *Conservation and Exhibitions*, 1987, Butterworths, Sevenoaks.
- Tate Gallery, *Manual of Art Handling*, (forthcoming), Tate Gallery, London.
- Advice on techniques and equipment for handling and moving different types of materials can be obtained through the Area Museum Councils, and from the national museums.
- See Section 5 'Location Control' and Section 6 'Movement Control' in *SPECTRUM: The UK Museum Documentation Standard*, 1994, Museum Documentation Association, Cambridge.

29 Standards for condition checks

- 29.1 A condition check procedure should be used before and after each movement to identify any damage, deterioration or infestation. It should record condition in a consistent way throughout the tour, to minimise misunderstandings between lender, organiser and venue. The condition of vulnerable or high-value exhibits should be checked by the lender's representative.

Where a lender does not lay down a condition check procedure, the organiser should:

- 29.2 plan for the time and cost of setting up a condition check procedure;
- 29.3 complete its own standard form for each exhibit;
- 29.4 require its representative or nominee to use this form when an exhibit is unpacked and repacked;
- 29.5 receive confirmation of condition checks before and after each move;
- 29.6 monitor and document the condition of exhibits throughout the tour;
- 29.7 take appropriate action on any new damage, deterioration or infestation;
- 29.8 advise the lender of all changes in condition.

The lender should:

- 29.9 use a standard form to record the condition of each exhibit;
- 29.10 require any courier or nominee to use this form when an exhibit is unpacked and repacked;
- 29.11 receive confirmation of condition checks before and after each move;
- 29.12 check the form regularly to monitor the condition of each exhibit throughout the tour;
- 29.13 take appropriate action on any new damage, deterioration or infestation.

The venue should:

- 29.14 follow the condition check procedure;
- 29.15 provide space and equipment for checking the condition of exhibits;
- 29.16 complete the appropriate form where the organiser delegates this task;
- 29.17 advise the organiser about any new damage, deterioration or infestation;
- 29.18 inform the organiser if the exhibit is not in a state to continue to be on exhibition.

Guidelines and notes

- 29.19 The organiser should devise a system for checking and recording the condition of individual exhibits, and should ensure that condition checks are carried out before and after each move during the tour, including the return to the lender. The layout of the form should be clear and uncluttered, and should

follow a standard format, to help those responsible for completing it to understand it at a glance. The form should also be easy to handle, consult and complete during installation and dismantling. Photocopies of photographs or diagrams should be used as well as verbal descriptions. The procedure should include a method of reporting back any changes in condition, eg by returning a photocopy of the relevant forms to the organiser, who should then refer it to the lender [6].

- 29.20 The procedure may combine the report forms and procedures of the different lenders. A frequent lender will normally have its own Condition Check form, to record the status of the exhibit immediately prior to leaving its premises, during the tour itself and on the return to its premises. Ideally, there should be a single form for the whole tour. The different forms used by the larger museums should ask similar questions and be reasonably consistent in format, so that condition can be recorded in a consistent way throughout the tour [24].
- 29.21 The organiser should provide a Condition Check form where smaller institutions or individuals do not supply one, and the lender should be given a copy showing the exhibit's condition on arrival at the organiser's premises. The organiser should ensure that the same standard of checking is applied to all exhibits throughout the tour.
- 29.22 Condition should be checked before and after each movement to identify any damage, deterioration or infestation. The condition of vulnerable or high-value exhibits should be checked by the courier supervising unpacking and installation and dismantling and repacking [33]. If no courier is present, the organiser must send a representative or nominate a person in the venue to use this form to record the condition of the work after unpacking and before repacking. The organiser may delegate condition checks to the venues where the exhibits are robust, of low value or from the organiser's own collection. The Condition Check form can also help to identify the exhibit and serve as an aide-memoire.
- 29.23 Where the organiser has delegated condition checks to the venues, the latter should follow the organiser's procedure carefully, to maintain consistency and legibility of recording. Wherever monitoring responsibilities lie, venues should satisfy themselves that exhibits are in a good enough state to continue on exhibition. Venues should provide a clean space with sturdy tables and suitable lighting, as well as equipment such as magnifying glasses and environmental monitors.
- 29.24 The condition of working objects and equipment should be checked by a competent person [18]. The condition of all display furniture (display cases, frames, plinths, etc.) should be noted and any defect or repairs reported [16, 17].

Sources of advice and help

- Jones L., 'Hankyu - The Final Analysis: A New Approach to Condition reporting for Loans', *V&A Conservation Journal*, July 1993, No.8, pp 14-16, Victoria & Albert Museum, London.
- Stollow, N., 'Examination procedures and reporting', *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, pp 25-46, Butterworths, Oxford.
- The Victoria & Albert Museum has extensive experience of lending many different types of material and its 'Final Condition Statement for Outgoing Loans' is a useful model.

30 Standards for packing

- 30.1 Packing is an integral part of the transportation strategy for a tour. Crates, boxes and other packing should be designed to provide maximum protection and support and minimum stress for exhibits in transit. Display materials should also be provided with packing to help them to survive in good condition until the end of the tour.

The organiser should:

- 30.2 design packing to withstand the wear and tear anticipated in a tour;
- 30.3 provide exhibits and display materials with physical support appropriate to their vulnerability and the risk;
- 30.4 provide packing to protect exhibits and display materials from shocks or excessive vibration;
- 30.5 pack separately exhibits and display materials;
- 30.6 use inert materials for packing exhibits and display material;
- 30.7 provide packing to protect exhibits and display materials from extremes of temperature and humidity;
- 30.8 provide packing to protect exhibits from loss or theft;
- 30.9 design packing that each venue can move without damage or injury;
- 30.10 advise venues of the space needed for moving cases and for the temporary storage of empty cases;
- 30.11 provide precise instructions for unpacking and repacking;
- 30.12 mark packing with appropriate symbols and instructions for handling and access.

The lender should:

- 30.13 supply any crate or packing previously made for the exhibit;
- 30.14 advise the organiser of the time and cost of making any new packing;
- 30.15 provide the organiser with the dimensions and weights of packed exhibits;
- 30.16 specify any requirements for packing ordered by the organiser.

The venue should:

- 30.17 provide the organiser with dimensions of openings for service routes;
- 30.18 provide trained staff;
- 30.19 plan time and space for packing and unpacking;
- 30.20 follow instructions for unpacking and repacking;

30.21 store packing safely and in similar conditions to the exhibition space;

30.22 replace damaged packing, and inform the organiser.

Guidelines and notes

- 30.23** A transportation strategy will define the type of packing required in relation to the mode of transport, escort arrangements and insurance or indemnity cover [26, 32, 33]. Design of packing should be discussed with carriers, since it will influence the method and cost of transport. Thermal and shock-absorbing requirements should be specified when ordering packing. Air freight makes particular demands on packing.
- 30.24** When packed, exhibits should be orientated in the position which puts them under least stress. They should be wrapped separately and be clearly distinguished from the surrounding packing or filling. Packing materials should be inert and appropriate to the nature of the exhibits. Within a strong rigid casing, shock-absorbing materials should protect the exhibits against physical shock and vibration. Packing should be stencilled with the international symbols to indicate the right way up and fragile material.
- 30.25** Packing should help to maintain exhibits and display materials within the agreed parameters of temperature and humidity. The degree of protection should be appropriate to sensitivity of the exhibit, the length of the journey and the weather conditions. Packing should be stencilled with the international symbol for protection from the weather. After a long journey or in extreme weather conditions, packing should be allowed to acclimatise before being opened, and should be opened gradually.
- 30.26** Packing balances safety with size, weight and cost. The size and strength of packing should be appropriate to the size and weight of its contents, with smaller items supported within compartments or smaller boxes to minimise damage from movement or vibration. Dimensions and weights should also be designed for the access routes in each venue (taking into account sizes of door and lift openings and difficult corners and stairs) and for the equipment and staff available at each location. Gross weight should be stencilled on the outside of each case. Where possible, packing should be designed for trolleys and lifting equipment, eg with a pallet base, so that it can be carried by fork-lift equipment. Handles and load points should be provided, and packing should be stencilled with the international symbols to indicate carrying points or carrying restrictions.
- 30.27** Before delivery of the exhibition, the organiser should advise each venue of the approximate number of staff needed to move each crate without contravening health and safety legislation. The venue should clear an access route, make ready staff and equipment and prepare areas for unpacking and storage in acceptable conditions.
- 30.28** Packing should be designed to withstand the wear and tear of a tour, and should be easy to maintain and practicable to replace. As part of the Condition Check procedure, a venue should advise the organiser of any damage or other changes to the packing which may compromise its ability to protect its contents during transit [29]. The organiser should supply all materials which should be replaced, eg tape for glass. It should keep a supply of materials for replacing dirty or damaged packing. A venue should notify the organiser about any packing and support materials which have become damaged or dirty or otherwise unsuitable for re-use. It should replace damaged packing with the same material, and the organiser should reimburse costs where it has not provided the replacement itself.
- 30.29** For transit, packing should not be labelled on the outside with details of its contents, but should bear a code to enable contents to be identified using the tour inventory [6]. It should be possible to locate exhibits immediately, so that they can be inspected by Customs if necessary, and so that they can be replaced in the right container when the exhibition is repacked. The organiser should also provide a

manifest, which lists the crates, as well as their dimensions and weights, as a simple way of accounting for all crates at delivery and collection times [6].

- 30.30 Crates and other packing should be marked on the outside with the method of gaining entry. A case should be designed to be opened easily and to allow the removal of the contents without the need for special tools or equipment. If special tools are required, they should be packed separately but be clearly marked or coded. The organiser should replace any missing tools. Inside each crate should be a list of its contents, together with full instructions (with diagrams or photographs as necessary) on the order in which supports should be removed for access to the exhibits, and the order in which exhibits and their supports should be replaced.
- 30.31 Venues should provide clean storage for all transit cases and packing material [31]. If packing materials cannot be stored in the same environmental conditions in which the exhibits are displayed, they must be given time to adjust to those conditions prior to repacking. Internal fittings should not be removed. Only when in storage in controlled and secure premises should a case be labelled to indicate if it is full or empty and to identify the exhibit for which it is intended.
- 30.32 Display cases, panels and other exhibition furniture should be packed separately from the exhibits [16, 17].
- 30.33 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

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- British Museum, *A Guide to the Storage, Exhibition and Handling of Antiquities, Ethnographia and Pictorial Art*, 1990 (2nd edition), British Museum Publications, London.
 - Sitwell, C., *Packing and Handling Works of Art*, 1989, Touring Exhibitions Group.
 - Stollow, N., *Conservation and Exhibitions*, 1987, Butterworths, Sevenoaks.
 - Some Area Museum Councils offer a handling, packing and transport service.

31 Standards for storage

- 31.1 Exhibits, exhibition furniture and packing materials should be stored in conditions as near as possible to those in the exhibition area, with the exception of lighting which is only required when an exhibit is being checked or moved.

The organiser should:

- 31.2 arrange storage for exhibits which have to acclimatise inside their packing;
- 31.3 store exhibits, materials and packing to avoid shocks, vibration, abrasion, flood and contamination;
- 31.4 maintain temperature and humidity within the store at levels similar to those agreed for the display areas;
- 31.5 secure the store to protect the exhibits, materials and packing from the risk of loss or theft;
- 31.6 reduce the exposure of stored exhibits to light to a minimum;
- 31.7 advise venues of the space and conditions required for the storage of the exhibition and/or individual exhibits, where necessary;
- 31.8 advise venues of the space and conditions required for the storage of packing materials.

The lender should:

- 31.9 require its exhibits to be stored in conditions equivalent to those agreed for the exhibition space;
- 31.10 require packing materials to be stored in similar conditions or to be acclimatised before repacking.

The venue should:

- 31.11 arrange suitable storage, if required, for exhibits which have to acclimatise inside their packing;
- 31.12 arrange suitable storage for the packed exhibition, if required;
- 31.13 arrange suitable storage, if required, for exhibits that are not displayed;
- 31.14 arrange suitable storage of packing cases and materials;
- 31.15 plan storage to avoid shocks, vibration, abrasion, flood and contamination;
- 31.16 maintain temperature and humidity within the store at levels similar to those agreed for the display areas;
- 31.17 secure the store to protect the exhibits, materials and packing from the risk of loss or theft;
- 31.18 reduce the exposure of stored exhibits to light to a minimum.

Guidelines and notes

- 31.19 Following a long journey or after a journey by air or water, exhibits should be stored in controlled conditions, still packed in their crates, to allow them to adjust gradually to the exhibition environment. For reasons of space and environmental conditions, it may be more practical to place the unopened cases in the exhibition area. The length of this period of acclimatisation should be agreed with the organiser.
- 31.20 Venues should be prepared to store an exhibition in its packing for any necessary period before installation and after dismantling. Transport schedules are often difficult to change, and there may be periods between the delivery and installation or between dismantling and collection when the exhibition must be stored in safety. Individual exhibits which are not to be displayed or are withdrawn from display for any reason must be stored in appropriate conditions. If any exhibit is not on display, the venue should inform the organiser, who should then inform the lender, setting out reasons and confirming storage conditions [24].
- 31.21 Where exhibits are held in storage for an extended period, periodic inspection must be made to check on their wellbeing and to ensure that levels of humidity and temperature are within satisfactory limits. For the sake of environmental continuity, exhibits should be stored in their packing, in conditions which are monitored and controlled in the same way as the exhibition area. Light is only needed when the exhibit is being checked, so the store should be kept in darkness or the exhibit should remain in its packing or be covered with opaque material. Access to storage areas should be controlled, especially during the installation and dismantling of an exhibition.
- 31.22 Because they have a vital buffering role when exhibits are moved outside the exhibition environment, packing materials should be stored in similar conditions. If conditions between storage and display areas are different, packing should be acclimatised in the exhibition area to bring them into equilibrium with the exhibits. This will ensure that the packing does not have an adverse effect on the exhibits once the latter are replaced in their crates [30].
- 31.23 To achieve the best environmental conditions for all materials, storage may have to be organised on the basis of types of material. Where it is not possible to provide all the appropriate conditions in individual rooms or zones, microclimates should be created in sealed cases.
- 31.24 Shelving should be strong enough, and should be wider than the boxes or exhibits to be placed on it, to avoid knocks to overhanging boxes. The stacking of boxes should be avoided. Heavier items and boxes should be placed on lower shelves to reduce risk of damage and injury when moving them. Crates should be placed on pallets or shelves at least 15 cms above the floor [38]. The operation of roller racking and drawers should be smooth, to avoid damage to fragile material. Floor loading should be adequate.
- 31.25 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Stolow, N., 'Storage', *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, pp 59-69, Butterworths, Oxford.
- Advice may be available from the Area Museum Councils.

32 Standards for carriers and agents

- 32.1 The organiser should devise a transportation strategy to protect exhibits from shocks or excessive vibration, extremes of humidity and temperature and loss or theft throughout the tour. Any arrangement between organiser, lender, agent and/or carrier and venue should be agreed in advance in writing, and responsibilities for action and payment should be clearly defined before exhibits are moved between premises. A shipping agent should prepare relevant documentation and ensure rapid passage through ports and airports, to shorten the period of exposure to environmental and security hazards.

The organiser should:

- 32.2 plan for the time and cost of making and supervising transport arrangements;
- 32.3 commission an agent, if necessary, to arrange carriers and/or customs documentation;
- 32.4 confirm arrangements with agent or carriers when a schedule and/or documentation is satisfactory;
- 32.5 provide agent or carriers with details of the exhibits and precautions to protect them in transit;
- 32.6 brief the agent or carrier on responsibilities vis-à-vis any courier;
- 32.7 obtain from lenders details of vehicular access to delivery/collection points;
- 32.8 brief the carrier in good time on collecting and returning exhibits;
- 32.9 advise lenders of the name and local contact of the agent or carrier, and arrangements for delivery and collection;
- 32.10 obtain from venues details of vehicular access to delivery/collection points;
- 32.11 brief the agent or carrier on addresses, dates and times of delivery and collection for each venue;
- 32.12 advise the venue of expected dates and times of delivery and collection, and the name and local contact of the agent or carrier;
- 32.13 inform each venue of the duties of the agent during delivery and collection of the exhibition, especially vis-à-vis any courier(s);
- 32.14 keep details of transport itineraries and schedules secure and confidential;
- 32.15 confirm in writing the organiser's obligations in transit and when each venue's responsibilities begin and end.

The lender should:

- 32.16 advise the organiser of any preferences with regard to agents or carriers;
- 32.17 provide the organiser or its agent with details of the exhibits and precautions to protect them in transit;

- 32.18 provide the organiser or its agent with details of vehicular access to the exhibit's location;
- 32.19 brief any courier on its responsibilities vis-à-vis the agent and/or carrier;
- 32.20 observe the arrangements and timetable of the organiser or its agent for collection and return of the exhibit;
- 32.21 satisfy itself about the organiser's arrangements for transport during the tour.

The venue should:

- 32.22 provide the organiser with details of vehicular access to the delivery/collection point;
- 32.23 keep details of transport itineraries and schedules secure and confidential;
- 32.24 prepare staff and facilities for the expected dates and times of delivery and collection;
- 32.25 observe the arrangements and timetable for the delivery and collection of the exhibition;
- 32.26 note the respective duties of agent and courier(s) during delivery and collection of the exhibition;
- 32.27 confirm in writing its obligations in transit and when these responsibilities begin and end;
- 32.28 observe any requirements of Customs & Excise concerning sealing and unsealing a consignment;
- 32.29 transfer all documentation as required.

Guidelines and notes

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- 32.30 A mode of transport should not be fixed without considering also packing, couriers or escorts and insurance or indemnity cover [26, 30, 33]. A transportation strategy combines the choice of carrier and transport to be used for collecting and returning exhibits and for touring the exhibition together with these other factors, to keep hazards and costs to the minimum. Exhibits should be entrusted to reputable carriers who are trained to transport museum material and equipped to transport large, awkward, fragile or valuable items. The Museums Security Adviser can provide a list of carriers in the UK. Lenders may insist on a specific carrier [24].
 - 32.31 The organiser is normally responsible for collecting and returning all exhibits. If the final venue is responsible for returning exhibits, this should be with the knowledge and approval of the lenders, and should be accompanied by a complete transfer of documentation [6]. Lenders should be advised of the name of the carrier, registration number of the vehicle and expected times and dates of collection and delivery. The carrier should be fully briefed on what to expect at collection or delivery, so that it is prepared for difficult locations.
 - 32.32 The organiser should indicate who is responsible for arrangements for transport between venues. If venues are required to arrange onward transport, this should be clear when the hire arrangements are agreed, and should also be with the knowledge and approval of the lenders and be accompanied by a complete transfer of documentation [6, 10]. Venues should be informed of the packed size and weight of the load and any security or environmental requirements [30, 34, 35].
 - 32.33 The organiser should request from each venue route directions to its delivery point, parking restrictions and contact instructions which it can pass to its carriers. All relevant information should be given to

a carrier in good time, to enable it to provide a realistic estimate of the time and cost. The organiser should specify the number, sizes and weights of crates, levels of protection and any other special requirements, address for collection and delivery, and preferred schedule. The carrier should indicate how it intends to carry out the task.

- 32.34 Organiser and carrier should agree where a consignment should not be a part-load, or where radio-contact or courier escort is required [33]. As far as possible, journeys should be continuous and direct. There are legal restrictions on the number of hours drivers are permitted to drive, and the carrier should advise the organiser how a journey can be completed within the law. The organiser should arrange secure storage where there are any overnight stops, and where there is a possibility of delays, eg from cancellation of ferry crossings. The advice of the local police should be sought on any special security arrangements if the value is very high. Individual exhibits and whole exhibitions should only be left unattended once they are in secure premises, and a courier or second driver should accompany a driver.
- 32.35 Exhibits should travel by road in appropriate packing which has been securely fastened within a roadworthy, insulated and secure vehicle equipped for the transport of museum exhibits [30]. Vehicles should have alarms, secure locks and seals to detect tampering, especially for a ferry crossing. Air-ride suspension should be specified if the material or the journey requires it. Where environmental control is required, actual temperature and humidity limits should be specified [25, 35]. Carriers should observe fire precautions in transit: vehicles should have appropriate fire extinguishers; and staff should be trained in dealing with fires [37].
- 32.36 For ferry crossings, the carrier and/or the agent should specify a below-decks, mid-beam and mid-ships position. The insulation of the vehicle and the packing of the exhibits must be adequate to cope with shorter crossings, when air-conditioning and air-ride systems must be switched off. Environmental control systems should be plugged into the ferry's power supply, where provided by operators on longer routes and where voltages are satisfactory. The crossing should be treated in the same way as secure storage for overnight stops during inland journeys. The vehicle should be left securely locked and alarmed, and arrangements should be made with the ship's purser, if possible, for periodic inspection.
- 32.37 Sea passages of longer than thirty-six hours should not be contemplated, particularly in containers and ships' holds where it is impossible to maintain stable environmental conditions. If exhibits are to be transported in containers, the organiser should specify a below-decks, mid-ship, mid-beam position. If cabin space is contemplated instead, shipping companies should be asked for details of environmental conditions in passenger accommodation. Whatever the length of crossing, the period on the quayside should be shortened by avoiding delays and ensuring rapid passage through customs.
- 32.38 In the UK, specialist fine art and museum carriers can also act as agents for international shipments, preparing customs documentation and making arrangements for international transport and for the courier in transit. Agents should be in attendance at ports of entry and exit, to supervise the movement of the shipment and to co-ordinate arrangements with carriers, airline or ferry personnel, customs officers, police and security services. A tour involving movement over several international borders will require the services of several agents, all co-ordinated by a 'leading agent'. Agents should be chosen on the basis of their experience of the type of move and the type of material in the shipment. Lenders and venues should be consulted on their experience of agents with whom they have worked satisfactorily.
- 32.39 The organiser or agent should provide drivers with all the necessary customs documentation to be presented at ports of entry and exit. Arrangements should be made in advance to clear customs as soon as possible, and to fund any import duty or port charges required. Agents at the point of disembarkation should be instructed to request immediate port clearance to a bonded store or final Customs control at the venue. Storage by HM Customs must be kept to a minimum, and it is normally possible for customs officers to seal packing at the previous venue and to open it on arrival at the following venue.

- 32.40 The carrier should inform the organiser of estimated times of collection and delivery, which the organiser should communicate to the venues involved. The venue must ensure that the staff and premises are ready to receive (and, after the showing, to dispatch) the exhibition on schedule. Venues should check carefully the packed sizes and weights of the exhibition, to provide sufficient staff and equipment, and to ensure that cases and crates can be taken into the exhibition area [28, 30]. Delivery and collection should be documented with signed receipts [6]. All necessary documentation should be transferred to the carrier on collection of the exhibition.

Sources of advice and help

- Gresswell, M., *Importation and Exportation of Exhibitions and Artefacts*, (undated), Touring Exhibition Group.
- Mecklenburg, M. F. (ed), *Art in transit: studies in the transport of paintings*, 1991, National Gallery of Art, Washington.
- Richard, M., Mecklenburg, M. F. and Merrill, R. M. (eds), *Art in transit: handbook for packing and transporting paintings*, 1991, National Gallery of Art, Washington.
- Stollow, N., *Conservation and Exhibitions*, 1987, pp 174-196: Chapter 10, 'Transportation modes, strategies and equipment', Butterworths, Sevenoaks.
- See 'General conditions for the transport of items to be covered by the Government Indemnity Scheme', obtainable from the Museums & Galleries Commission, London.
- Guidance on transport can be obtained through the Area Museum Councils.

33 Standards for couriers

- 33.1 A lender should liaise with the organiser on the need for a courier, either to escort exhibits in transit or to install them, or both. The courier should be briefed and authorised to act for the protection of the exhibit(s). Organiser and venues should plan their arrangements to ensure the courier's work is completed as quickly as possible

The organiser should:

- 33.2 inform itself about the lender's policy and criteria for the use of couriers, before requesting a loan;
- 33.3 note the lender's reasons for requiring a courier and the proposed duties, once the loan has been requested;
- 33.4 agree arrangements to satisfy the lender's requirements;
- 33.5 agree with the lender any financial and administrative implications;
- 33.6 plan for a courier to be present for all the duties agreed with the lender;
- 33.7 brief the courier on arrangements with agent and/or carrier and venues;
- 33.8 inform the venues about the duties of couriers during the installation and removal of the exhibition;
- 33.9 make arrangements to enable the courier's tasks to be completed as quickly as possible;
- 33.10 defer to the courier in all matters concerning the safety of the exhibit, and carry out any necessary improvements to the exhibition.

The lender should:

- 33.11 publish its criteria on the use of couriers;
- 33.12 decide whether an exhibit requires a courier;
- 33.13 decide if the courier's duties can be shared with another institution;
- 33.14 inform the organiser immediately if a courier is necessary;
- 33.15 agree the courier's responsibilities and duties with the organiser;
- 33.16 agree the courier's method of travel with the organiser;
- 33.17 agree with the organiser its financial and administrative duties vis-à-vis the courier;
- 33.18 plan for the time and cost of making an experienced courier available for as long as agreed;
- 33.19 brief the courier about responsibilities, duties and key contacts.

The venue should:

- 33.20 provide the organiser with sufficient detail to help a lender to decide if an exhibit requires a courier;
- 33.21 help the organiser to agree satisfactory arrangements with a lender;
- 33.22 note the stages at which a courier should be present;
- 33.23 note the moments when the exhibit passes into and out of the venue's care;
- 33.24 defer to the courier in all matters concerning the safety of the exhibit;
- 33.25 make arrangements to enable the courier's tasks to be completed as quickly as possible;
- 33.26 plan for the time and cost of hosting couriers;
- 33.27 agree any financial and administrative implications with the organiser;
- 33.28 carry out any improvements to the installation required by the courier.

Guidelines and notes

- 33.29 A transportation strategy will involve decisions about the couriers who should escort the exhibits, in addition to the transport to be used, the packing required and the insurance or indemnity cover to be arranged [26, 30, 32]. A courier is one method by which lenders seek to ensure the safe installation of exhibits, but secure carriers may present a smaller risk for transferring exhibits between different premises.
- 33.30 Individual exhibits and whole exhibitions should never be left unattended, and a courier or second driver should accompany a driver. Carrying larger or high-value exhibits by train may require the presence of two couriers. Taxis should be used only for small items on short and direct routes, and should be ordered, not hailed in the street. Official cars are suitable only for small exhibits that can travel safely wrapped or boxed. Staff who use their own vehicles should have insurance that covers the use of the car for official business.
- 33.31 Museums and galleries should publish their criteria on the use of couriers, which might relate to:
 - fragility;
 - rarity, irreplaceability or uniqueness;
 - political or cultural sensitivity;
 - financial, artistic, historical, scientific or other value;
 - the type of packing used;
 - distance or complexity of move;
 - the type of transport and the number of trans-shipments;
 - handling or installation requirements which require special skills;
 - unfamiliarity with the venue;
 - environmental threats which require the presence of an expert.
- 33.32 To save time and cost, professionals who share the same standards should be able to share couriers. Normally, the lender will appoint a courier from its staff, but it may be possible to delegate this responsibility to a courier from a comparable institution who is accompanying exhibits of similar material or supervising their installation. Wherever possible, the same person should supervise all the moves in a tour. Documentation must be thorough where this is not possible.

- 33.33 The organiser should always be advised of the reasons for the courier. The cost of couriers is a major element of many exhibitions, and organisers and venues should be convinced of the necessity of a courier and then should be satisfied by the way that a courier carries out the specified tasks.
- 33.34 The lender should also be sensitive to the cost borne by the organiser or venues, in terms of the transport the courier uses. When accompanying exhibits as hand-luggage, couriers should travel first or business class to help to protect the exhibits and to reduce fatigue, but advance planning can take advantage of cheaper fares. Return journeys without exhibits should be Standard class. The organiser should advise its carrier and/or agent where a journey will include a courier, so that transport can be arranged [32]. The agent should book tickets for airline seats in order that the courier's flight can be coordinated with the freight passage and clearance formalities.
- 33.35 A courier should have full delegated authority for the safety and security of the exhibit until it is officially released into the care of the organiser or venue, and should take all steps to minimise risk. A courier should be selected because that person's experience is appropriate to the duties and tasks. The courier should be aware of the special conditions relating to the loan and the journey, and should be fully briefed about the exhibit and the venue, as well as the courier's own travel and accommodation arrangements. The courier should also carry appropriate monitoring equipment. In transit, couriers should never leave unattended the exhibits they are accompanying, except when passengers and freight must be separated at airports and on vehicle ferries [32].
- 33.36 The lender should specify whether an exhibit travelling by air should travel as hand luggage or as freight. Air transport is a fast and direct way of reaching major cities throughout the world, but all journeys with customs formalities at ports of entry and exit can involve delays, which an agent may be able to ease [32]. Couriers should only carry individual exhibits as hand-luggage, where the case is small and portable and where the amount of other luggage is limited. The case should be strapped to a seat that has been booked next to the courier.
- 33.37 A crate travelling as air-freight should be accompanied until it is placed on a pallet. The case should be placed on the pallet the right way up and orientated in the best way to reduce stress in flight. It should not be placed on a pallet with material which is any way incompatible or which might pose a risk. It should be covered with polythene sheeting before being netted, to protect it during loading and unloading from the exposed conditions on airport handling areas. The pallet number should be recorded so that before boarding the courier can check that the crate has been loaded.
- 33.38 The venue should arrange hotel accommodation and provide the courier on arrival with any money agreed for subsistence and expenses. The venue should also make any alterations to travel arrangements arising from delays in meeting the conditions of loan. At the venue, a courier should inspect the exhibition and storage facilities, assess the state of readiness of the exhibition area and agree the method of display. Financial responsibility for carrying out any improvements required by the courier should be agreed between organiser and venue [10].
- 33.39 After any agreed rest and acclimatisation period, the courier should supervise unpacking, check items against documentation, complete condition reports, place the exhibits on display and supervise the secure fixing or closing of any cases [28, 30]. On return to the lender's premises, the courier should confirm the safe arrival and installation of the exhibit, ensure that Condition Reports are ready for the next leg of the tour, and brief the next courier if appropriate [6, 29].

Sources of advice and help

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- Buchanan, J., 'The Courier's Art' in *Museum News*, February 1985, the American Association of Museums, Washington, DC.

- Keller, S., *Protecting your collection in transit*, 1939, Steven R. Keller Associates Inc., Algonquin Avenue, Deltona, Florida 32725.
- Rose, C., *Courierspeak*, 1993, Smithsonian Institution Press, Washington.
- Registrars Sub-Committee for Professional Practices of the American Association of Museums, 'Code of Practice for Couriering Museum Objects' in *Registrar*, Volume 4, Number 1, Spring 1987, American Association of Museums, Washington, DC.

34 Standards for security

- 34.1 A venue's building is the outer and most solid line of defence protecting exhibits from security hazards, and any weaknesses in this outer shell should be rectified before alternatives are considered. Invigilation is the inner defence which protects the exhibition from theft or damage when the public has access to the building.

The organiser should:

- 34.2 satisfy itself that the structure of each venue is capable of withstanding attacks by thieves or vandals;
- 34.3 satisfy itself that all openings in the fabric of each venue are defended and covered by suitable intruder detectors;
- 34.4 satisfy itself on each venue's policy of key security;
- 34.5 inform venues of the lenders' overall requirements with regard to security;
- 34.6 provide guidance so that each venue can assess the level of risk for each exhibit;
- 34.7 approve venues' proposals for invigilation;
- 34.8 confirm standards of invigilation with lenders.

The lender should:

- 34.9 assess the security of each venue;
- 34.10 indicate any general requirements for invigilation.

The venue should:

- 34.11 assess the level of risk to exhibits, and advise the organiser of any problems;
- 34.12 assess the level of risk to exhibits, and propose levels of invigilation;
- 34.13 advise the organiser of any history of burglary or break-in of the building when unoccupied;
- 34.14 advise the organiser of any history of theft or damage at the venue;
- 34.15 ensure that the structure of the building is capable of withstanding attacks by thieves or vandals;
- 34.16 ensure that all openings in the building fabric are defended and covered by intruder detectors;
- 34.17 enforce a strict policy of key security;
- 34.18 enforce internal procedures for reporting loss or damage;
- 34.19 observe any special requirements made by the lenders or precise instructions made by the organiser;

34.20 advise the organiser of any special security measures.

Guidelines and notes

- 34.21 The security risk should be assessed for every incoming exhibition, and levels of invigilation should be agreed with the organiser. Unusual or exceptional risks should be discussed with the local Crime Prevention Officer and if necessary with the Museums & Galleries Commission's Museums Security Adviser. The security assessment should take into account the value or other significance of the exhibits, the stipulations of the organiser and/or lenders, the requirements of indemnity or insurance, conditions in the immediate neighbourhood and any previous experience of burglary or break-in.
- 34.22 Round-the-clock warding is a poor substitute for a weak building, undefended openings and an inadequate alarm system. It should be used in conjunction with a strong outer shell and perimeter alarms on all doors and windows, and there should be a method of raising the alarm. Special exhibitions often require physical security to be upgraded, and can be the opportunity for carrying out work which has been postponed for many years.
- 34.23 The structure of the building or the area in which the exhibition will be shown should be capable of withstanding a determined attack. Doors and windows must be physically defended to deter or delay an intruder while an intruder alarm is activated. Display cases should not be regarded as the primary protection against theft of display material when the building is unoccupied [16]. Stores housing exhibition material must be kept locked [31].
- 34.24 Doors, windows, rooflights and other openings should be covered by intruder detectors and by an alarm system to BS 4737. The system should be as simple as possible, to avoid any false alarms. Movement or body-heat detectors should be used only where absolutely necessary and in limited numbers. The signalling of an alarm condition should be by means of a monitored line to an alarm company's central station or, where appropriate, an internal controller. This should give an alarm if the line is cut.
- 34.25 Organisers and venues should agree on the principles of key security. There should be no more keys than are strictly necessary, and the number of people in possession of keys should be kept to a minimum. All keys, both to doors and display cases, should remain within the building in a secure key cabinet or safe, and should be identified by a coding system. Only door-keys held by keyholders and keys to safes should be allowed to leave the buildings. An issue system against signature should be used as a security measure.
- 34.26 Exhibitions often require invigilation to be increased, because of the increased risks arising from media attention, financial value and increased numbers and different types of visitor. Exhibitions involving ethnographic material or natural history specimens can attract hostility from those who associate them with offences against sacred beliefs or animal rights.
- 34.27 A lender's conditions for loans should set out overall principles, and it should be up to the organiser and the venues to set out how they intend to fulfil these conditions according to local conditions, experience and resources [6, 10, 24]. Invigilation should be provided to fulfil these requirements, and must never be reduced. If staff are not available, the exhibition must be closed. Venues should ensure that warding staff are briefed to protect the exhibits and to look out for change or damage. If they are also expected to deal with visitors' questions, this should not be in a way that compromises security.
- 34.28 Access to the exhibition space should be controlled, and invigilation should be increased during installation and dismantling [28]. Special precautions should be taken at private views, lectures and other events taking place outside normal opening hours, to restrict access to supervised areas [19]. Warding staff should be briefed about internal procedures for reporting any loss or damage and for dealing with emergencies [26, 39]. They should also understand the treatment that working objects or interactive devices can tolerate, so that they can deal courteously and effectively with visitors to prevent

injury as well as damage [18]. Display furniture may be used to distance exhibits from the visitor where appropriate [17].

- 34.29 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Burke, R. and Adloye, S., *Basic Museum Security*, 1991 (2nd edition), International Council of Museums, Paris.
- Dovey, B., 'Security' in Thompson, J. M. A. et al (eds), *Manual of Curatorship*, 1992 (2nd edition), Butterworth-Heinemann/Museums Association, Oxford.
- Hoare, N., *Security for Museums*, 1990, Committee of Area Museum Councils.
- Kluwer Handbooks, *Handbook of Security*, updated periodically, Croner Publications Ltd, Kingston on Thames.
- Museums Association's *Guidelines on Security When Using Outside Contractors*, published annually in Museums Yearbook, Museums Association, London.
- Museums & Galleries Commission, 'Museum and Gallery Security', 1989, Museums & Galleries Commission, London.
- Advice is available from the Area Museum Councils, and from the Museums Security Adviser at the Museums & Galleries Commission.

35 Standards for the exhibition environment

- 35.1 The museum building is the outer and most solid line of defence protecting exhibits from the external weather conditions. The internal environment is the inner defence, but air conditioning and other methods of control should be considered only after any weaknesses in the outer shell are rectified.

The organiser should:

- 35.2 inform venues of overall requirements for the environmental conditions in which exhibits will rest for more than 24 hours;
- 35.3 satisfy itself about each venue's measures to protect the exhibits from external weather conditions;
- 35.4 satisfy itself about each venue's measures to control natural and artificial lighting;
- 35.5 satisfy itself about each venue's measures to control variations in temperature and humidity;
- 35.6 satisfy itself about each venue's measures to control pollution.

The lender should:

- 35.7 agree with the organiser the range of temperature and humidity acceptable for each exhibit.

The venue should:

- 35.8 maintain its building to minimise the risk of damage to the exhibition from external weather conditions;
- 35.9 provide records of lighting, temperature and humidity for all areas where exhibits will stay;
- 35.10 take precautions to protect the exhibits from variations in temperature and humidity;
- 35.11 take precautions to protect the exhibits from unacceptable levels of pollution;
- 35.12 ensure that any environmental protection provided or requested by the organiser is not compromised.

Guidelines and notes

- 35.13 The building should be assessed for each incoming exhibition, in relation to the likely external weather conditions (temperature, humidity and pollution), the internal environment and any previous history of flooding or pollution [38]. Display cases should not be regarded as the primary protection against environmental fluctuations [16].
- 35.14 Incoming exhibitions often require environmental controls to be upgraded. In some cases the upgrading is short-term (eg hire of de/humidifiers); in other cases an incoming exhibition can be the opportunity for carrying out repairs or improvements to the fabric which might have been postponed for many years. All buildings used for the display and storage of exhibitions should be regularly inspected to ensure that they continue to give adequate physical protection against external weather conditions. All possible

sources of damp should be identified and remedied. Aside from immediate effects of damage by water, leaks or rising damp can raise relative humidity to unacceptable levels.

- 35.15 The fabric of the building should insulate against external fluctuations of temperature and humidity. Ideally, spaces for temporary exhibitions should be located in the core of a building, which should be less subject to external conditions. Temperature and relative humidity should be monitored in all areas where the exhibition will stay for more than 24 hours, including storage and handling spaces. Variations should be compared with external weather conditions, to assess how well the building insulates against the weather outside.
- 35.16 The building fabric is also the outer line of defence against dust and gaseous pollutants, and it should be regularly inspected to ensure that it continues to give adequate physical protection from the atmosphere outside. Comparison of internal data with data on the weather and air conditions outside will indicate how far the building allows the ingress of dust or gaseous pollutants. Draughtproofing and other simple measures help to prevent external pollutants from entering the building.
- 35.17 Venues should take readings of light, temperature and humidity in their exhibition spaces throughout the year, and should maintain regular records, so that relevant data can be produced on request from organisers or venues [15]. They should assess the environmental risk for every incoming exhibition, comparing these records with the stipulations of the organiser and/or lenders [10]. A lender may require each venue to complete a facilities report, or otherwise provide evidence of appropriate environmental conditions. Even after such a report is completed, venues should continue to monitor the environment in which the exhibition will be stored or displayed. They may be asked to supply environmental data during the showing itself, so that the organiser can keep the lenders informed, if they so wish.
- 35.18 Before an exhibit leaves its usual resting place, its immediate environment should be monitored to identify the range of temperature and humidity to which it has become adjusted. This range should become the basis of its environmental requirements once on loan, and should be used in preference to textbook guidelines because of the risk of damage if the exhibit has to adjust to new conditions. The organiser's aim should be to maintain these conditions and to make any fluctuations in relative humidity and temperature as gradual as possible [6, 14, 24, 25].
- 35.19 The organiser should inform venues of any environmental requirements. It should ask for temperature and humidity records for the exhibition area for a similar period in a previous year or for climatic conditions similar to those anticipated during the showing. The venue should indicate what measures it would take to stabilise any unacceptable fluctuations of temperature and humidity. Museum objects are sensitive to fluctuations in relative humidity which rises as the temperature falls, and vice versa.
- 35.20 Building and painting work can introduce excessive moisture into a building. Drying time can be speeded up using dehumidifiers, but conditions should be monitored before the exhibits are brought into the space. Other temporary increases in humidity levels can be countered by dehumidifiers or mechanical ventilation, but the causes should be tackled first. Cleaners should not use large amounts of water, and visitors should be persuaded to leave wet raincoats in a cloakroom.
- 35.21 Draughtproofing prevents external pollutants from entering the building, but can also trap harmful pollutants that are generated internally. The building fabric can be a direct cause of pollution, and it should be regularly inspected, so that any causes of pollution can be eliminated. Exhibition installation and redecoration can create both particles and vapours, and exhibits should not be installed in a newly-decorated building until dust has been removed and emissions reduced to acceptable levels. Photocopiers are a source of ozone, and should be kept in a well-ventilated space away from exhibits. All exhibition and storage areas should be kept clean and tidy.
- 35.22 Natural and artificial light should also be controlled because of their damaging effects on exhibits and because of the heat generated [15, 16].

- 35.23 Monitoring is the essential preliminary to considering whether any equipment is necessary to control temperature, humidity, dust or gaseous pollutants. Where exhibits have specific or varying requirements beyond the normal control of most venues in a tour, the organiser should create microclimates within sealed display cases or glazed and backed frames [16]. Monitoring equipment should be calibrated and placed in suitable locations to provide accurate readings. It should be maintained and read by trained staff.
- 35.24 Where humidifiers, dehumidifiers, heating or air-conditioning equipment is used to stabilise the internal environment, there should be a maintenance programme carried out or supervised by fully trained and experienced people. The quality of introduced air should be monitored where air-conditioning systems control only temperature and humidity, as this may be the means by which excessive pollutants are introduced into the exhibition environment.
- 35.25 Exhibits should travel in appropriate packing in insulated vehicles. Where environmental control is required, actual temperature and humidity limits should be specified to the carrier [32].
- 35.26 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Cassar, M., *Environmental Management: Guidelines for Museums and Galleries*, 1994, Museums & Galleries Commission, London.
- Stolow, N., *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, pp 19-21, Butterworths, Oxford.
- Thomson, G., *The Museum Environment*, 1986 (2nd edition), 'Climate Inside and Outside the Museum', pp 87-92, Butterworths, London.
- Advice is available from the Area Museum Councils, and from the Conservation Unit's Environmental Adviser based at the Museums & Galleries Commission.

36 Standards for protection against pests

- 36.1 A touring exhibition must not become an agent of infestation. Measures must be taken by organiser and venues to prevent and monitor infestation and to control pests that are present in a venue or are introduced by the exhibition.

The organiser should:

- 36.2 satisfy itself that venues are taking adequate measures to prevent display, handling and storage areas from being infested;
- 36.3 satisfy itself that venues monitor display, handling and storage areas to identify any infestation;
- 36.4 take all necessary steps to avoid infestation of exhibits and their packaging, but advise the venues where there is a risk;
- 36.5 consult the lender for permission to treat an infested exhibit;
- 36.6 give the venue permission to return or treat an infested exhibit and its packing.

The lender should:

- 36.7 check outgoing and returning loans for infestation;
- 36.8 provide a certificate of fumigation for recently-treated exhibits;
- 36.9 either give permission for treatment of infested exhibits;
- 36.10 or collect and treat infested material.

The venue should:

- 36.11 ensure that display, handling and storage areas are kept clean and tidy;
- 36.12 monitor display, handling and storage areas to identify any infestation;
- 36.13 isolate immediately any infested exhibit and its packing;
- 36.14 advise the organiser immediately of any infested exhibits or packing;
- 36.15 commission fully trained and experienced personnel to undertake or supervise the eradication of the pests, if permission is given for treatment.

Guidelines and notes

- 36.16 A touring exhibition may bring together exhibits from many sources and can travel to several venues, so it has the potential to transfer a pest that is present in one exhibit or venue to other exhibits and venues. All incoming exhibits and their associated packaging materials must be inspected for the presence of harmful biologically-active agents before being introduced to the main storage or display areas [29]. Where there is a risk of infestation, incoming exhibits should be kept in quarantine for as long as possible and be inspected regularly for biological activity. If infestation is found, reference should be made immediately to the organiser and to a qualified conservator.

- 36.17 Remedial treatments to eliminate any biologically-active agents should be minimal, in order to reduce potential risk of damage to exhibits, to the environment and to staff and visitors. Non-toxic methods of pest control, such as freezing, low oxygen levels and pheromone traps should be used where possible. All pest control must be undertaken, or supervised, by fully trained and experienced personnel.
- 36.18 Organisers, lenders and venues should each have an integrated pest management plan which includes regular cleaning of all exhibition and storage areas. Rats, mice, birds, insects and other harmful biologically-active agents should be excluded from display, storage and service areas. The environmental conditions should be such that fungi, algae, bacteria growth rates are small. A pest management plan should include monitoring of display, handling and storage areas to identify any infestation. Monitoring should include the systematic laying of traps, which themselves act as control devices.
- 36.19 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Pinniger, D., *Insect Pests in Museums*, 1990 (2nd edition), Archetype Publications, Denbigh.
- Stolow, N., *Conservation and exhibitions: Packing, transport, storage and environmental considerations*, 1987, pp 21-23, Butterworths, Oxford.
- Storey, K. O., *Approaches to pest management in museums*, 1985, Smithsonian Institution, Washington.
- Zychermen C. A. and Schrock, J. R., *A guide to museum pest control*, 1988, Association of Systematics Collections.
- Advice is available from Area Museum Councils and the Conservation Unit of the Museums & Galleries Commission.
- The storage and use of pesticides is controlled under the *Control of Pesticides Regulations*, 1986. Advice on pesticides is available from all regional offices of the Health and Safety Executive and from the Registration Section, Health and Safety Executive, Magdalen House, Stanley Precinct, Bootle, Merseyside L20 3QZ.
- The Health and Safety Commission and the Health & Safety Executive publish a great deal of information which is of interest to museum managers. Many publications are available free of charge. Contact HSE Publications Point, St Hugh's House, Stanley Precinct, Bootle, Merseyside L20 3LZ (Tel 051 951 4000). A full list of current Health and Safety Commission/Health & Safety Executive publications, 'Publications in Series', is published twice yearly. See:
- 'Health and Safety Commission Approved Code of Practice for the Safe Use of Non-Agricultural Pesticides', Health and Safety Executive, 1991.
- 'Pesticides', a list of permitted pesticides published annually by HMSO on behalf of the Health and Safety Executive and the Ministry of Agriculture, Fisheries and Food.
- For control of substances hazardous to health in fumigation operations, 'Control of Substances Hazardous to Health Approved Code of Practice', Health and Safety Commission, 1988.

37 Standards for protection against fire

- 37.1 The organiser must ensure that the exhibition installation itself is not a fire hazard or an obstacle to emergency evacuation. A venue has an extra duty of care when exhibits are on loan to it, and an incoming exhibition is an opportunity to review and upgrade its procedures for preventing and responding to fire.

The organiser should:

- 37.2 design the exhibition to avoid fire hazards;
- 37.3 advise each venue on exhibition layouts to avoid obstacles to emergency evacuation;
- 37.4 select materials for displays and packing on the basis of their fire-retarding characteristics;
- 37.5 satisfy itself that each venue has been designed or adapted to minimise the risk and spread of fire;
- 37.6 satisfy itself about each venue's fire protection measures.

The venue should:

- 37.7 consult the fire officer on any exhibition installation which might constitute a fire hazard;
- 37.8 arrange any external contracts for installation work on the premises on a 'Permit to Work' basis;
- 37.9 ensure that any materials added to the exhibition are selected for their fire-retarding characteristics;
- 37.10 ensure that all electrical wiring and equipment is regularly checked and maintained;
- 37.11 ensure that all parts of the building are covered by an automatic fire-detection and alarm system;
- 37.12 ensure that all parts of the building are equipped with fire-fighting equipment;
- 37.13 ensure that all staff are briefed in fire prevention and response for every exhibition installation.

Guidelines and notes

- 37.14 Local authority fire officers should inspect museums and galleries regularly, so that they are familiar with their particular requirements. A temporary exhibition provides a useful opportunity to invite a fire officer to do so.
- 37.15 Approval should be sought for any exhibition layout which might constitute a fire hazard or contravene fire regulations, and the organiser should ensure that the designer consults the fire officer. Normally all exhibition materials should be fire-retardant, and the fire officer's advice should be sought on the selection of materials used for display and packing. Works of art and other exhibits are not exempt from fire regulations.
- 37.16 Equipment should be installed and maintained to meet the safety standards of the country concerned. Venues in the UK should comply with the Fire Regulations for Public Buildings, 1993 (as amended).

An automatic fire-detection and alarm system should be installed and maintained in accordance with BS 5839: Fire Detection and Alarm Systems in Buildings. Fire-fighting equipment should comply with BS 5423: Portable Fire Extinguishers, and BS 5306: Fire Extinguishing Installations and Equipment on Premises. All contracts for building and installation work on the premises must be on a 'Permit to Work' basis and must include a 'hot-work clause'. Hot work should not normally be permitted.

- 37.17 The approval of the fire officer should also be sought for any installation which might be an obstacle to emergency evacuation. Venues should assess likely levels of attendance and type of visitor. A fire officer may advise that extra staff should be employed and trained for supervising emergency evacuation or that admissions should be controlled if an exhibition is likely to be very popular. Similar precautions may be required if the exhibition is likely to attract visually-impaired visitors or those using wheelchairs, who require more time and attention during emergency evacuation [13].
- 37.18 Exhibition areas should be insulated to not less than half an hour protection, but preferably one hour, from the spread of fire from workshops, laboratories, kitchens, boilers, chemical stores and other areas of risk. Smoking should be confined to designated parts of the premises which do not contain exhibits.
- 37.19 All staff should be briefed in fire prevention and response for each incoming exhibition, especially where the nature of the installation or the numbers or types of visitors anticipated require additional measures. There should be a fire precautions manual containing checklists and disaster plans and a reporting procedure.
- 37.20 In the event of a fire, the emergency services should be given a confidential plan of the building and a complete record of the material on display and storage, including exhibits in a touring exhibition [39]. The danger of water-damage as a result of fire should be considered in the museum's Disaster Plan and should be regularly discussed with the Fire Brigade [37, 39].
- 37.21 Carriers should also observe fire precautions in transit [32].
- 37.22 These standards and guidelines should be read in conjunction with those in the booklets in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

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- In the UK, a fire officer's inspection will be based on two Acts, the Fire Precautions Act 1971 and the Fire Safety and Safety of Places of Sport Act 1987.
 - A venue's conditions will be assessed in the light of two HMSO publications: *Guide to Fire Precautions in Existing Places of Work that Require a Fire Certificate*, which covers means of escape, methods of fighting fires and advice to management; and *Code of Practice for Fire Precautions in Factories, Offices, Shops and Railway Premises Not Required to Have a Fire Certificate*, which also covers legislation, fire resistance of materials, risk assessment, disabled facilities, fire-fighting equipment, instructions and fire-drills.
 - Information about UK fire authorities and companies offering prevention and detection services is contained in the *Security & Fire Prevention Yearbook*, available from Paramount Publishing (17-21 Shenley Road, Borehamwood, Herts).
 - Other useful information such as safety data sheets can be obtained from the Fire Protection Association (140 Aldersgate, London, EC1) and Fire Prevention Information (Aldermay House, Queen Street, London, EC4N 1TJ).
 - Many museums and galleries are in historic buildings, whose adaptation to meet fire prevention and security requirements often causes problems. *Fire safety in historic buildings*, 1990, published by

the Fire Protection Association is a useful source of advice. Area Museum Councils can also give advice - directly or through consultants - on possible solutions.

- In the UK, the level and standard of staff training in fire prevention and response should be consistent with Part 1 (18) of the Fire Precautions Act 1971.
- In the UK a 'hot-work clause' must meet the safety regulations contained in Section 31(4) of the Factories Act 1969.
- Helpful advice is contained in *The Museums and Records Office Emergency Manual*, 1991, East Midlands Museums Service, Nottingham.
- National Fire Protection Association Technical Committee on Libraries, Museums and Historic Buildings, *Recommended practice for the protection of museums and museum collections*, 1985, National Fire Protection Association, Boston.

38 Standards for protection against flooding

- 38.1 Exhibits, display furniture and packing should be protected from immediate damage from flooding and from the resulting increase in relative humidity.

The organiser should:

- 38.2 be satisfied that the venues have been designed and maintained to minimise the risk of damage by water;
- 38.3 be satisfied by each venue's precautions to protect exhibits from damage from water;
- 38.4 require temporary water detection alarms, if necessary.

The venue should:

- 38.5 ensure that the exhibition area has been designed and maintained to minimise the risk of damage by water;
- 38.6 provide an alarm system to detect the presence of water;
- 38.7 take precautions to protect exhibits from damage from water.

Guidelines and notes

- 38.8 Buildings used for the display and storage of exhibitions should be regularly inspected to ensure they are watertight. Failed or non-existent damp courses, leaking pipes, water tanks, faulty guttering, guttering blocked with leaves or snow, missing roof-tiles and other possible sources of damp should be identified and remedied. A badly-maintained building puts its contents including loans from other sources at risk, so maintenance should be a high priority.
- 38.9 As far as possible, exhibits should not be placed under pipework or tanks. Compliance with relevant building regulations and recommendations often make complete exclusion of pipework difficult, especially in old buildings. Every effort should be made, in discussion with the appropriate technical consultant, to find a satisfactory compromise. Where exhibits can be raised off the floor, pipework might be placed at floor level rather than ceiling level.
- 38.10 All pipework and stop-cocks should be labelled in accordance with BS 1710 and should be noted on the building plan in the museum's Disaster Plan [39]. They should be frequently inspected during frosts. Automatic cut-off valves should be installed, and leak detectors are desirable. Drainage to cope with flooding should be provided, and should have non-return traps.
- 38.11 If exhibits can be raised, they should be placed no lower than 15 cms above the floor. In storage, exhibits which can be raised (if necessary on a pallet, with lifting gear), should be raised and placed away from the walls. As extra protection from water leaking from above, the tops of display-cases should, where possible, be protected with polythene sheeting. Waterproof boxes, cabinets, etc, should be used wherever possible.
- 38.12 The danger of water-damage as a result of fire should be considered in the museum's Disaster Plan and should be regularly discussed with the Fire Brigade [37, 39].
- 38.13 All staff and volunteers should receive regular training in flood prevention and response. In the event of flood, the emergency services should be given a confidential plan of building and a complete record of material on display and in storage, including exhibits in a touring exhibition [39].

- 38.14 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- The Fire Brigade will provide advice on the prevention of flooding.

- 38.1 Buildings used for the display and storage of collections should be regularly inspected to ensure they are watertight. Failed or non-existent damp courses, leaking pipes, water tanks, faulty gutters, guttering blocked with leaves or snow, missing roof-tiles and other possible sources of damp should be identified and remedied. A badly-maintained building puts its contents including loans from other sources at risk, so maintenance should be a high priority.
- 38.9 As far as possible, exhibits should not be placed under pipework or tanks. Compaction with concrete, building regulations and recommendations often make complete exclusion of pipework difficult, especially in old buildings. Every effort should be made in discussion with the appropriate technical consultant to find a satisfactory replacement. Where exhibits can be raised off the floor, pipework might be placed at floor level rather than ceiling level.
- 38.10 All pipework and stop-cocks should be labelled in accordance with BS 1719 and should be noted on the building plan in the museum's Disaster Plan (39). They should be frequently inspected during floods. Automatic cut-off valves should be installed, and leak detectors are desirable. Drainage to cope with flooding should be provided, and should have non-slip treads.
- 38.11 If exhibits can be raised, they should be placed no lower than 15 cm above the floor in storage. Exhibits which can be raised off the floor on a pallet with lifting gear should be raised and placed away from the walls. As extra protection from water leaking from the top of display-cases should, where possible, be protected with polythene sheeting. Waterproof bags, exhibits etc. should be used where possible.
- 38.12 The danger of water-damage as a result of fire should be considered in the museum's Disaster Plan and should be regularly discussed with the Fire Brigade (37, 39).
- 38.13 All staff and volunteers should receive regular training in flood prevention and response. In the event of flood, the emergency services should be given a confidential plan of building and a confidential list of material on display and in storage, including exhibits in a touring exhibition (39).

39 Standards for planning for emergencies

- 39.1 A written Disaster Plan should include temporary supplements relating to any loans or exhibitions temporarily lodged in a venue.

The organiser should:

- 39.2 ensure that the carrier has a procedure for emergencies during transit;
- 39.3 require each venue to include the exhibition as a temporary supplement to its formal Disaster Plan;
- 39.4 indicate any priorities for rescue in the event of a disaster;
- 39.5 ensure that each venue has briefed its staff on the protection and rescue of the exhibition;
- 39.6 inform the lender immediately of any loss or damage resulting from an emergency.

The venue should:

- 39.7 include the contents of an incoming exhibition as a temporary supplement to its formal Disaster Plan;
- 39.8 take account of the organiser's priorities for rescue in the event of a disaster;
- 39.9 brief staff on the protection and rescue of material in the exhibition;
- 39.10 inform the organiser immediately of any loss or damage resulting from an emergency.

Guidelines and notes

- 39.11 A museum will normally write a Disaster Plan for the evacuation of the public and for the protection and rescue of its own collections during and after an emergency. In addition, the Plan should include a temporary supplement for any touring exhibition on show in the museum.
- 39.12 For fire and flood, the emergency services should be given a confidential plan of the building and a complete record of the material on display [37, 38]. The plan should show the priorities for limiting damage to exhibitions and collections, as well as services, hazardous stores, etc. Exhibits in a touring exhibition should be added to the record of the material on display and in store.
- 39.13 The venue should brief its staff on the protection and rescue of any loans or exhibits temporarily lodged in the institution, over and above their regular training in how to respond to emergencies and disasters. The general contents of a Disaster Plan should be known to all staff through previous discussion, training sessions and emergency exercises. As well as the protection given to incoming material, such supplements provide an opportunity for further training. Staff should be briefed on internal procedures for reporting any damage or loss and for informing lenders [24, 34].
- 39.14 The supplement to the Plan should include special procedures and planning for the evacuation of visitors if the exhibition is a complicated installation or attracts larger numbers of visitors or people with special needs [13].
- 39.15 Carriers should have general procedures for emergencies during transit, and the organiser should specify the action to take in relation to the particular shipment and the person to contact, in the event of an emergency [32].

- 39.16 These standards and guidelines should be read in conjunction with those in the Museums & Galleries Commission's series *Standards in the Museum Care of Collections*.

Sources of advice and help

- Helpful advice is contained in *The Museums and Records Office Emergency Manual*, 1991, East Midlands Museums Service, Nottingham.
- Anderson, H. and McIntyre, J., *Planning manual for disaster control in Scottish libraries and record offices*, 1985, National Library of Scotland, Edinburgh.
- Jenkins, I. A., *Disaster planning and preparedness: an outline disaster control plan*, 1987, British Library, London.
- Solley, T. T., Williams, J. and Baden, L., *Planning and emergency treatments in museums, art galleries, libraries, archives and allied institutions*, 1978, Institute for the Conservation of Cultural Material Incorporated, Canberra.
- Advice can be obtained from the Area Museum Councils. In addition, The Conservation Unit, based at the Museums and Galleries Commission, maintains a register of private conservators throughout England, Wales and Northern Ireland and a list of suppliers of materials. In Scotland this information is held by Historic Scotland's Conservation Bureau.
- The National Preservation Office video, 'If disaster strikes', is useful for training. Contact your AMC for hire or purchase of this video and to organise disaster contingency planning seminars.

Useful addresses

The addresses of these organisations can also be found in the *Museums Yearbook*, published annually by the Museums Association (42 Clerkenwell Close, London EC1R 0PA).

MUSEUMS & GALLERIES COMMISSION

(including the Conservation Unit)

16 Queen Anne's Gate
London SW1H 9AA
Tel: 0171 233 4200
Fax: 0171 233 3686

Access Co-ordinator: Alison Coles

TOURING EXHIBITIONS GROUP

Information Officer: Alice Masters
Hampshire County Council Museums Service
Chilcomb House
Chilcomb Lane
Winchester SO23 8RD
Tel: 01962 846304
Fax: 01962 869836

Chair: James Ayres
John Judkin Memorial
Freshford Manor
Bath BA3 6EF
Tel: 01225 723312
Fax: 01225 723730

Secretary: Mike Sixsmith
29 Point Hill
Greenwich
London SE10 8QW
Tel & Fax: 0181 691 2660

Treasurer: Steve Brake
Wrexham Library Arts Centre
Rhosddu Road
Wrexham
Clwyd LL11 1AU
Tel: 01978 261932
Fax: 01978 361876

AREA MUSEUM COUNCILS

Regional centres for information on UK museums, they also provide grants and advisory services.

AREA MUSEUM COUNCIL FOR THE SOUTH WEST

Hestercombe House
Cheddon Fitzpaine
Taunton TA2 8LQ
Tel: 01823 259696
Fax: 01823 413114

THE COUNCIL OF MUSEUMS IN WALES

The Courtyard, Letty Street
Cathays
Cardiff CF2 4EL
Tel: 01222 225432
Fax: 01222 668516

EAST MIDLANDS MUSEUMS SERVICE

Courtyard Buildings
Wollaton Park
Nottingham NG8 2AE
Tel: 0115 985 4534
Fax: 0115 928 0038

NORTH OF ENGLAND MUSEUMS SERVICE

House of Recovery
Bath Lane
Newcastle upon Tyne
NE4 5SQ
Tel: 0191 222 1661
Fax: 0191 261 4725

NORTH WEST MUSEUMS SERVICE

Griffin Lodge
Cavendish Place
Blackburn BB2 2PN
Tel: 01254 670211
Fax: 01254 681995

NORTHERN IRELAND MUSEUMS COUNCIL

185 Stranmillis Road
Belfast BT9 5DU
Tel: 01232 661023
Fax: 01232 683513

SCOTTISH MUSEUMS COUNCIL

County House
20/22 Torphichen Street
Edinburgh EH3 8JB
Tel: 0131 229 7465
Fax: 0131 229 2728

SOUTH EASTERN MUSEUMS SERVICE

Ferroners House
Barbican
London EC2Y 8AA
Tel: 0171 600 0219
Fax: 0171 600 2581

WEST MIDLANDS AREA MUSEUM SERVICE

Hanbury Road
Stoke Prior
Bromsgrove B60 4AD
Tel: 01527 872258
Fax: 01527 576960

YORKSHIRE & HUMBERSIDE MUSEUMS COUNCIL

Farnley Hall
Hall Lane
Leeds LS12 5HA
Tel: 0113 263 8909
Fax: 0113 279 1479

NATIONAL ARTS COUNCILS

THE ARTS COUNCIL OF ENGLAND

14 Great Peter Street
London SW1P 3NQ
Tel: 0171 333 0100
Fax: 0171 973 6590

ARTS COUNCIL OF NORTHERN IRELAND

Stranmillis Road
Belfast BT9 5DU
Tel: 01232 381591
Fax: 01232 661715

THE ARTS COUNCIL OF WALES

Museum Place
Cardiff CF1 3NX
Tel: 01222 394711
Fax: 01222 221447

THE SCOTTISH ARTS COUNCIL

12 Manor Place
Edinburgh EH3 7DD
Tel: 0131 226 6051
Fax: 0131 225 9833

CRAFTS COUNCIL

44a Pentonville Road
Islington
London N1 9BY
Tel: 0171 278 7700
Fax: 0171 837 6891

REGIONAL ARTS BOARDS

ENGLISH REGIONAL ARTS BOARDS

5 City Road
Winchester
Hants SO23 8SD
Tel: 01962 851063
Fax: 01962 842033

EAST MIDLANDS ARTS

Mountfields House
Epinal Way
Loughborough
Leicestershire LE11 0QE
Tel: 01509 218292
Fax: 01509 262214

EASTERN ARTS BOARD

Cherry Hinton Hall
Cherry Hinton Road
Cambridge CB1 4DW
Tel: 01223 215355
Fax: 01223 248075

LONDON ARTS BOARD

Elme House
133 Long Acre
London WC2E 9AF
Tel: 0171 240 1313
Fax: 0171 240 4580

NORTH WEST ARTS BOARD

12 Harter Street
Manchester M1 6HY
Tel: 0161 228 3062
Fax: 0161 236 5361

NORTHERN ARTS

9-10 Osborne Terrace
Jesmond
Newcastle upon Tyne NE2 1NZ
Tel: 0191 281 6334
Fax: 0191 281 3276

SOUTH EAST ARTS

10 Mount Ephraim
Tunbridge Wells
Kent TN4 8AS
Tel: 01892 515210
Fax: 01892 549383

SOUTH WEST ARTS

Bradinch Place
Gandy Street
Exeter EX4 3LS
Tel: 01392 218188
Fax: 01392 413554

SOUTHERN ARTS

13 St Clement Street
Winchester
Hampshire SO23 9DQ
Tel: 01962 855099
Fax: 01962 861186

WEST MIDLANDS ARTS

82 Granville Street
Birmingham B1 2LH
Tel: 0121 631 3121
Fax: 0121 643 7239

YORKSHIRE & HUMBERSIDE ARTS

21 Bond Street
Dewsbury
West Yorkshire WF13 1AX
Tel: 01924 455555
Fax: 01924 466522





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