
Overview

This standard is for archaeologists who have responsibility within organisations to assess which items can be lent to others and for liaising with users of the collection.

Organisations routinely lend and borrow items to and from other organisations and individuals. There have to be some criteria and procedures for the lending and borrowing of items, set within the context of the organisation's overall policy on collection management. Once the criteria and procedures are established, any request from a potential borrower for a loan has to be measured against them and the loan can then be negotiated. When items are borrowed, the situation is reversed. This unit covers establishing criteria for lending items so that the candidate and others have clear guidelines to follow; evaluating requests from borrowers for the loan of items; agreeing (however simply) what happens when items are lent to others; and agreeing (however simply) what happens when items are borrowed from others.

Performance criteria

You must be able to:

Establish criteria and procedures for lending items

- P1 Identify and apply relevant technical and ethical standards
- P2 Determine the categories of borrower and the purposes of borrowing
- P3 Estimate and agree the resources required to provide a lending service
- P4 Establish criteria which express the standard conditions for lending items
- P5 Establish procedures for identifying the current condition of an item
- P6 Establish procedures for assessing risk to items
- P7 Ensure the lending procedures collect and record all the details required by the organisation
- P8 Specify clearly the limits of responsibility for lending items
- P9 Establish procedures for monitoring and reviewing the lending criteria

Evaluate a request for the loan of an item

- P10 Identify clearly any risks to the item with advice from specialists where necessary
- P11 Establish the purpose of the loan with the borrower
- P12 Specify clearly the borrower's intended use of the item
- P13 Identify clearly the environment in which the loan will be maintained
- P14 Identify the costs of the loan and the liability for those costs
- P15 Establish arrangements for monitoring the loan
- P16 Check that the terms of the loan fall within the organisation's lending criteria

Agree the loan of an item to a borrower

- P17 Establish and agree the lending terms with the appropriate people
- P18 Conduct negotiations with the borrower within your area of authority

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P19 Present the conditions of the loan to the borrower in a clear and precise manner

P20 Agree with the borrower who will be responsible for the costs of the loan

P21 Agree a method of monitoring the transportation, installation and ongoing condition of the loaned items

P22 Agree and formally record all relevant details of the loan

Agree the loan of an item from a lender

P23 Explain clearly the purpose of the loan to the lender

P24 Identify the lender's borrowing conditions and correctly evaluate the organisation's ability to meet them

P25 Identify clearly the environment in which the item will be maintained

P26 Identify any potential risks to the item and feasible methods to minimise them

P27 Conduct negotiations with the lender within your area of authority

P28 Agree and formally recording all relevant details of the loan

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Knowledge and understanding

You need to know and understand:

- K1 Relevant technical and ethical standards
- K2 How to establish standard conditions for lending items and collections
- K3 How to specify procedures and criteria for loans
- K4 How to evaluate the effectiveness of procedures
- K5 The loan policy, procedures and criteria of the organisation
- K6 National guidelines on the selection, retention and dispersal of collections
- K7 How procedures can be used to identify potential risks to the item
- K8 The information that is required during lending and borrowing
- K9 The job roles in the organisation, and how to specify limits of responsibility
- K10 The potential threats to objects from their environment
- K11 Why a loan policy is necessary
- K12 Who should receive copies of the loan policy
- K13 How to minimise potential threats
- K14 How to monitor loans, and how this differs according to the type of borrower
- K15 The likely purposes of loans
- K16 The potential risks to items from the method of transportation, the borrower's staff and the means of display
- K17 The impact the purpose of the loan has on the evaluation of the request
- K18 The information that is required during lending
- K19 The likely differences between different types of borrower, and the duration of the loan
- K20 The cost factors associated with a loan
- K21 The insurance requirements
- K22 How to encourage and enable team members to take responsibility for monitoring and controlling activities against budgets

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- K23 The requirements and legal rights of the organisation in relation to lending items
- K24 How to specify the loan terms, and how to present these to the borrower
- K25 What room for manoeuvre there is during negotiation
- K26 Under what circumstances it would be necessary to refuse a loan
- K27 The responsibilities of the lender and borrower
- K28 Who the appropriate people are with whom to conduct negotiations
- K29 The potential problems that may affect the loan
- K30 The potential reasons for a loan
- K31 Why it is important to formally record agreements with the borrower
- K32 Your organisation's requirements
- K33 How to establish and specify the terms of the loan
- K34 How to assess whether the organisation can meet the lender's terms
- K35 How to provide details of the accommodation for the loaned item
- K36 How to maintain goodwill during negotiation
- K37 How to consider offers, either acceptances or rejections
- K38 How to record the results of the negotiation for different types of borrowing
- K39 The concerns of the lending organisation, and how these can be addressed
- K40 What it is reasonable to expect in terms of monitoring the loaned item
- K41 What room for manoeuvre there is during negotiation
- K42 Who the appropriate people are with whom to conduct negotiations
- K43 Why the loaned item is needed

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Validity

Status

**Originating
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occupations**

Suite

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