

LOAN POLICY

Statement of Basic Principles

1. A loan is the temporary physical transfer of material without transfer of ownership. Loans are undertaken by the Peabody Museum as a matter of professional courtesy.
2. Loans are made on behalf of Yale University by a curator or curatorial designee.
3. Because the University recognizes the Director as the primary custodian of the Museum's collections, the Director retains the final power to authorize loans or exceptions to policy.
4. Loans are made for non-commercial purposes.
5. Responsibility for the care and custody of material loaned by the Peabody Museum must be accepted in writing by a suitable institution through its authorized representative. Exceptions to this requirement can be made only by the Director on the advice of a curator or curatorial designee.
6. In the case of incoming loans, only a curator, the Director, or a curatorial designee can accept material on behalf of the Peabody Museum.

Outgoing Loans - External

Requests from institutions outside the University to borrow Peabody Museum specimens for research or exhibit should be made in writing to the appropriate curator or curatorial designee. Requests should include the following information: the purpose of the loan; a description of the material requested in as much detail as possible; and where, and under whose responsibility, the specimens will be housed while on loan.

The Museum loans only to institutions, not to individuals. A permanently employed institutional representative who has authority to bind the institution is named responsible for the loan. Investigators who are not located at, or affiliated with, an institution can make arrangements to have specimens sent to a nearby facility as long as a responsible member of that institution is willing to accept responsibility for the specimens, and provided that the specimens remain on the premises of that institution. Specimens requested by students, post-doctoral fellows, or emeritus faculty require endorsement by an appropriate curator or current faculty member with authority to bind the institution, and will be considered the direct responsibility of the institution and the endorser.

Only under exceptional circumstances will loans be made to individual borrowers without institutional affiliation or sponsorship. To be named an "authorized borrower," an unaffiliated individual must be known to a division of the Peabody Museum, must have demonstrated the capacity to handle and store specimens correctly and securely, and to return specimens in a timely manner, and must be formally approved jointly by the appropriate curator and the Director of the Peabody Museum.

Some specimens in the Museum's collections are not available for loan, including specimens judged too fragile or too environmentally sensitive to travel, and specimens needed for teaching or exhibition at the Museum. Some divisions do not loan type specimens, figured specimens, or single representatives of a taxon.

Loan requests will be reviewed by staff of the appropriate division, and when appropriate by the conservator. After review, loans must be approved by the curator or curatorial designee. Environmental guidelines for material requested for exhibit will be specified by the conservator.

All specimens loaned from the Peabody Museum of Natural History are subject to the following stipulations:

1. The length of each loan will be specified at the time of the loan, and will generally not exceed one year. Requests for extensions should be made in writing to the appropriate division.
2. Loaned specimens may not be transferred or forwarded to another individual or institution, even if the person who requested the loan changes institutional affiliation, without prior written permission from the responsible Peabody Museum curator or curatorial designee.
3. Specimens on loan for research should be housed securely and according to professional standards. Specimens should be protected from extremes of temperature and humidity, from insects, vermin, and dirt. Light-sensitive specimens should be protected from light when not being studied.

In the case of loans for exhibit, the Peabody Museum Conservation Department will specify handling and mounting methods, and lighting and security guidelines. In some cases, a borrowing institution will be asked to submit a facilities report before an exhibit loan can be approved.

4. Specimens should not be sampled, dissected, prepared, molded or otherwise replicated, remounted, reframed, repaired, coated for photography, fumigated, or in any way altered without prior written permission from the appropriate curator or curatorial designee.

5. Exchange or permanent retention of a duplicate specimen is permitted by some divisions of the Museum by arrangement in writing with the curator or curatorial designee.
 6. Documentation affixed to specimens such as accession or catalogue numbers must not be altered or discarded. The Museum should be notified of taxonomic changes when material is returned.
 7. Specimens returning from loan are the responsibility of the borrower until received by the Peabody Museum. Returning specimens, which must be accompanied by an invoice, should be packed properly and with the same care as they were when sent out, and returned by the same shipping method, or as specified by the division at the time of return.
 8. The curator and staff of the division loaning a specimen will indicate the appropriate value for insurance on the loan form; returning specimens should be insured for this value. When specimens are valued at more than \$2,500, the Assistant Director for Conservation and Collections should be consulted.
 9. In the case of research loans, the borrower must agree in advance to cover the cost of return shipping and return insurance. Reimbursement may be required for additional expenses such as construction of shipping crates, outward shipping, and couriering.
- For exhibit loans, the borrower must agree in advance to provide all-risk, wall-to-wall insurance and to cover all packing and shipping costs. Reimbursement may also be asked for conservation treatment, for fabrication of exhibit mounts, and for couriering.
10. The Peabody Museum should receive credit in exhibit labels, catalogues, and publications based on the use of specimens from its collections. The acronym "YPM" should be used to cite the Museum's specimens (unless otherwise specified by the division). Authors are asked to send two reprints of any publication based in whole or in part on material loaned from the Museum.

Failure to follow the Museum's policies may jeopardize the borrowing institution's future loan privileges.

Outgoing Loans - Intramural

An intramural loan is a temporary physical transfer of material to another organization within Yale University.

Requests from such organizations to borrow Peabody Museum specimens for research or exhibit should normally be made in writing to the appropriate curator or curatorial designee. Requests should include the following information: the purpose of the loan; a description of the material requested in as much detail as possible; and where, and under whose responsibility, the specimens will be housed while on loan.

Specimens requested by students, post-doctoral fellows, or emeritus faculty require endorsement by an appropriate curator or current faculty member, and will be considered the direct responsibility of the endorser.

Some specimens in the Museum's collections are not available for loan, including specimens judged too fragile or too environmentally sensitive to travel, and specimens needed for teaching or exhibition at the Museum. Some divisions do not loan type specimens, figured specimens, or single representatives of a taxon.

Loan requests will be reviewed by staff of the appropriate division, and when appropriate by the conservator. After review, loans must be approved by the curator or curatorial designee.

All Peabody Museum specimens loaned intramurally are subject to the following stipulations.

1. The length of each loan will be specified at the time of the loan, and will generally not exceed one year. Requests for extensions should be made in writing to the appropriate division.
2. Loaned specimens may not be transferred or forwarded to another individual or institution, even if the individual who requested the loan changes institutional affiliation, without prior written permission from the responsible Peabody Museum curator or curatorial designee.
3. Specimens on loan for research should be housed securely and according to professional standards. Light-sensitive specimens should be protected from light when not being studied. In the case of loans for exhibit, the Peabody Museum Conservation Department will specify handling and mounting methods, and lighting and security guidelines.
4. Specimens should not be sampled, dissected, prepared, molded or otherwise replicated, remounted, reframed, prepared, repaired, coated for photography, fumigated, or in any way altered without prior written permission from the appropriate curator or curatorial designee.

5. Exchanges or permanent retention of a duplicate specimen is permitted by some divisions of the Museum by arrangement in writing with the curator or curatorial designee.
6. Documentation affixed to specimens such as accession or catalogue numbers must not be altered or discarded. The Museum should be notified of taxonomic changes when material is returned.
7. Specimens returning from intramural loan are the responsibility of the borrower until received by the Peabody Museum. Returning specimens, which should be accompanied by an invoice, should be packed properly and with the same care as they were when sent out. It is the responsibility of the borrower to make proper arrangements for the return of materials to the Peabody Museum, and to inform the loaning division of these arrangements.
8. The Peabody Museum should receive credit in exhibit labels, catalogues, and publications based on the use of specimens from its collections. The acronym "YPM" should be used to cite the Museum's specimens (unless otherwise specified by the Division). Authors are asked to send two reprints of any publication based in whole or in part on material loaned from the Museum.

Failure to follow the Museum's policies may jeopardize future borrowing privileges.

Incoming Loans

The Peabody Museum accepts loans for research and for special exhibits. All transactions whereby specimens and documentary materials are brought into the Museum must be covered by a written agreement. It is the responsibility of the borrower to ensure that necessary documentation, including required permits, is in place for loans involving specimens covered by protective legislation and treaties such as the Endangered Species Act, CITES, NAGPRA, etc. The Peabody Museum will not borrow specimens that are known to have been collected or imported in violation of state, federal or international restrictions, or which may otherwise place the Museum in a compromising legal or ethical position.

Anyone who borrows material in the name of the Peabody Museum must agree to abide by these conditions.

1. **Research Loans.** A request to borrow research specimens from another institution or individual should be made in writing. Loans for use by students, post-doctoral fellows, and others are accepted only with the written endorsement of the appropriate Peabody Museum curator. All incoming loans must be signed

for by the curator or curatorial designee of the appropriate division, and processed both in and out by that division.

Insurance arrangements for incoming loans should be based on the value placed on the loan by the lender. When specimens are valued at more than \$2,500, the Assistant Director for Conservation and Collections must be consulted. All conditions set on an incoming loan must be reviewed by the curator. Conditions set on use and storage of specimens must be achievable. Once accepted, conditions are binding, and the Museum will make every effort to adhere to these restrictions. No portion of an incoming loan may be transferred to a location or person that has not previously been approved in writing by the lending institution. Borrowed specimens may not be altered in any way without written permission. It is the responsibility of the borrower to see that a loan is returned in a timely fashion.

Specimens that are damaged or lost while at the Peabody Museum must immediately be documented in writing, and the lending institution must be notified. Questions about insurance or other costs relating to damage or losses must be referred to the Assistant Director for Conservation and Collections.

2. Exhibit Loans. A request to borrow specimens for exhibit at the Peabody Museum must be made in writing by either the Director or the appropriate curator or curatorial designee. When an exhibit loan has been approved, originals or copies of the loan agreement, releases, environmental requirements, or other written agreements are given to the Assistant Director for Conservation and Collections who, in consultation with the concerned division(s), oversees arrangements for insurance, shipping, unpacking and repacking. The conservator completes condition reports in consultation with the division, and oversees compliance with conditions (mounting method, environmental considerations, etc.) set by the loaning institution.