

## Courier Principles

The National Gallery, London, the Metropolitan Museum of Art, New York and the Museum of Fine Arts, Boston, have joined together to develop a framework for evaluating courier requirements for loaned objects from their collections.

The presence of a physical courier is often the best way to mitigate risk for museum objects in transit and ensure the safe handling of works through unpacking, installation, deinstallation and return. However, the outbreak of the Covid-19 pandemic in March 2020 and the continuing travel restrictions have made it necessary to adapt alternate methods for monitoring works in transit, including the use of “bookend” couriers and “remote” courier appointments made possible by developing technology. The pandemic response has provided the museum sector with a generational opportunity to reflect upon standard practices related to couriating artwork, and has generated robust discussions between registrars, conservators, curators, museum directors, art shippers and insurance brokers concerning best practices, which are shaping nuanced criteria for when a physical courier is required.

The experiences of shipping objects during the pandemic have informed our ways of working and our institutions are now committed to reducing the number of couriers, where possible, but we also recognize that these decisions must be made on an object-by-object, venue-by-venue basis. Many objects, by nature of their fragility, rarity, importance to the collection or other criteria as defined below, will always require physical couriers who can identify and solve problems on the spot, both in transit and at the borrowing institutions. Other objects may be more suitable to travel without courier accompaniment, or with bookend supervision of transit by experienced museum staff or contracted representatives and/or shipping agents and remote supervision of condition checking and art handling. There also may be times when a hybrid approach with some physical and remote elements is a valid option.

We acknowledge the on-going conversations about physical versus remote couriers highlight a number of issues of concern including: the environmental impact of lending and borrowing; the additional workload and resource burdens placed on borrowing and lending staff to enable the remote monitoring of loans; and the net benefits of the remote model in terms of reduced courier costs versus the needs for additional staff, equipment and time to efficiently manage a remote installation; the expectations of insurers and government indemnity programs that museums will continue to adhere to the highest standards of risk management; and the understanding that current technological options are in need of further development.

A critical part of the loans review process is determining whether a physical courier or a remote option is appropriate, or whether there needs to be any additional supervision at all. We suggest that the following criteria should be carefully considered and discussed by the designated curators, conservators and registrars.

- Concerns about extreme fragility of objects
- Special handling requirements for objects
- Pre-eminence and artistic/historical/cultural importance of objects
- Indemnity/insurance requirements, and insurance values
- Proposed shipping route, method of transport, schedule and overnight stops
- Whether the scale of the loan adds complexity to logistical and installation arrangements

- Prior experience working with the borrower and knowledge of their staff skill set, staff resourcing, experience, and communication protocols
- Knowledge, experience and communications with the transport agents
- Current/topical external factors and emergencies
- Relevant anticipation of risk, and contingencies for mitigation against risk
- Requirements of touring exhibitions or exhibition transfers to/from partner venues as per exhibition/lender agreements
- Possibility of sharing of couriers with other lenders, for transits and on site, with the borrower
- Whether adopting a policy of using virtual couriers will have an impact on the number of loans granted
- The impact internally on staff when working remotely across different time zones
- Whether sending couriers will have a significant impact on exhibition budgets
- The significant resources, time, and technology required for staff to facilitate remote courier appointments
- Whether digital platforms can be successfully supported by lender and borrower for installation/de-installation

As formal approach to the review process, the attached *Loan Out Courier Assessment (Appendix A)*, is a tool to guide decisions based on the individual loan and object. It can be adapted to accommodate a variety of institutions and collections.

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## Appendix A

### LOAN OUT – COURIER ASSESSMENT

<b>Exhibition Title</b>	Exhibition title
<b>Venue/s</b>	
<b>Dates</b>	

### COMMENTS ON OBJECT/S

<b>Artist / Title</b>	<b>Medium</b>	<b>Conservation requirements</b>	<b>Handling requirements</b>

### RISKS AND CONSIDERATIONS

<b>Objects</b>		Comments:
Conservation requirements	YES / NO	
Handling requirements	YES / NO	
Specific/unique artistic/historical/cultural importance?	YES / NO	
Individual values over indemnity/insurance thresholds	YES / NO	
<b>Borrower/Venue</b>		
Previous loans / experience with borrower or venue	YES / NO	
New / renovated venue	YES / NO	
Knowledge of borrower	YES / NO	<i>e.g. knowledge, experience, communication etc.</i>
Knowledge of venue	YES / NO	<i>e.g. access, environment, equipment etc.</i>
<b>Transport</b>		
Complicated journey	YES / NO	<i>e.g. route, duration of journey, method of transport</i>
Overnight stops	YES / NO	<i>e.g. schedule and overnight stops</i>
Knowledge of transport agent/s	YES / NO	<i>e.g. knowledge, experience, communication, drivers, vehicles etc.</i>
Customs/licenses/legal documents	YES / NO	
<b>Other</b>		
Indemnity/insurance requirement	YES / NO	
Topical or current external factors/emergency situations	YES / NO	
Requirement of borrower, exhibition touring/partner or other contractual agreement	YES / NO	

ACTION PLAN			
<b>Courier required?</b> (edit as required)	<b>Yes (Physical)</b> <ul style="list-style-type: none"> <li>• For all movements</li> <li>• Outward only</li> <li>• Installation only</li> <li>• Return only</li> <li>• Bookend only</li> <li>• Other</li> </ul>	<b>Yes (Remote)</b> <ul style="list-style-type: none"> <li>• Airport</li> <li>• Arrival</li> <li>• Installation</li> <li>• Takedown</li> <li>• Other</li> </ul>	<b>No</b> <ul style="list-style-type: none"> <li>• No courier for any part of the trip</li> </ul>
<b>Type of courier?</b>	<i>e.g. Conservator / Registrar / Exhibition manager / Art Handler / Technician / Preparator / Curator / other</i>		
<b>Rationale for decision</b>	<p><i>State overall risk that courier will mitigate or reason they are required) e.g. Courier required because...USGI indemnity requirement, very fragile object, new unknown borrower, long complicated journey etc.</i></p> <p><i>Courier not required because...uncomplicated relatively stable work, short journey, trusted relationships and proven track record etc.</i></p>		
<b>Mitigations</b> (if not sending a physical courier)	<ul style="list-style-type: none"> <li>• <i>None required</i></li> <li>• <i>Use digital tracker for live updates on location/temperature/vibration</i></li> <li>• <i>Borrower to provide bookend courier to/from...</i></li> <li>• <i>Local known/trusted individual to act as courier</i></li> <li>• <i>Other trusted lender to act as courier</i></li> <li>• <i>Regular communications with transport agent at all key stages of journey</i></li> <li>• <i>Enhanced documentation from borrower</i></li> <li>• <i>Virtually oversee delivery</i></li> <li>• <i>Virtually attend unpacking/installation</i></li> </ul>		
<b>Assessed by</b>	<i>Name / Title</i>		
<b>Signed off by</b>	<i>Name / Date</i>		
<b>Additional comments</b>			