

The Henry Moore Foundation

Ethical Loans Policy

The Henry Moore Foundation is a registered charity, set-up and generously endowed by Henry Moore in 1977 to advance the education of the public by the promotion of their appreciation of the fine arts and in particular the works of Henry Moore. It operates from Perry Green, Hertfordshire and the Henry Moore Institute, Leeds.

The Foundation also supports a wide range of projects and activities in the visual arts through its Grants Programme. Among areas covered are grants to art institutions, galleries and museums for new projects, collections, and research and development, plus student bursaries, Post-Doctoral fellowships at UK universities and fellowships for artists at UK art schools and colleges.

The Henry Moore Foundation runs an estate at Perry Green consisting of the Moores' home, Hoglands, seventy acres of garden and parkland, studios and galleries which are open to the public by appointment from April to October; visitors are charged an admission fee. Housed on the estate is a major collection of the artist's sculpture, drawings, graphics and textiles, as well as a vast photography and letter archive, and library relating to Moore's life and work. The Foundation facilitates access to this unique resource for research, workshops, publications, displays, exhibitions and loans. Access to the library and archives for research is available by appointment all year; admission is free, and the Foundation may be able to provide accommodation to those travelling from further afield.

The exhibition galleries at both venues are fully accessible. Staff on duty are trained to offer assistance and information as required. All printed information is available in large print and/or Braille. Public areas are fitted with an induction loop.

The Foundation's exhibition programme, both at Perry Green and venues worldwide, draws on the collections gifted to it by the artist, which have been augmented subsequently by gifts and acquisitions. In order to fulfil this programme, the Foundation borrows works on a regular basis from institutions and private individuals in the UK and abroad. Recent displays of Moore's work have included themed exhibitions in Helsinki, Berlin, Paris and Frankfurt; retrospective exhibitions in Barcelona and Athens;

exhibition tours of Japan and Brazil, and a major outdoor sculpture exhibition tour to botanic gardens in Kew, New York and Atlanta.

The Henry Moore Institute was formed by the Foundation in 1993 in partnership with the City of Leeds in a distinct building adjoining Leeds Art Gallery. It has its own galleries and curatorial programme, bringing together three related strands: collections, research and exhibitions. Admission to the Institute is free.

The Institute's staff includes those salaried by the City of Leeds to care for the Leeds' sculpture collections. The collection includes sculpture, works on paper and archives of primary source material. The Foundation helps to develop these collections with resources for their acquisition, research and display though the collection remains the sole property of Leeds Museums and Galleries (LMG). The Institute arranges annual redisplays of the Leeds' sculpture collection and occasionally asks for loans from other collections to complement and enhance Leeds' collections displays.

All due diligence guidelines (outlined in this policy) apply to loans from the Leeds' collections, except that the Institute may request works of art by emailing the LMG Registrar directly. The Registrar regards such loans as inter-site transfers and will not issue the Institute with formal loan agreements; this is only possible because of the unique partnership between the City and the Foundation. The Institute will ask for Leeds' loans at least six months in advance and will arrange 'nail to nail' insurance before works are moved.

The Institute's library is open to the public every day of the week and its archive is open by appointment. Both these resources are used by scholars, students and the general public, and through a Fellowship scheme. There is no admission fee but users are required to register.

The Institute arranges a diverse programme of temporary exhibitions in its gallery spaces as well as shared spaces in Leeds Art Gallery. The exhibition programme explores the meanings of sculpture, historically and geographically. Shows are developed in-house, through research work undertaken by the curatorial team, and in collaboration with international specialists. The Institute borrows works for exhibitions from major international and national collections as well as commercial galleries, artists

and private collections. The Institute arranges 10-11 exhibitions a year and all are free to the public. The Institute is a Known Consignor.

The research programme complements exhibitions and collections, not only by convening conferences, seminars and public lectures on their themes, but also by working with outside students and scholars and disseminating new thinking in the area. Conferences are developed in tandem with other institutions and specialists, and may lead to publications which are published with the help of the Foundation. All events are open to the public. Occasional charges apply for larger events.

The Institute has operated a Fellowship programme since 1995. In addition, in 2006 the Institute launched a Senior Fellowship scheme allowing senior academic staff a break from teaching and other responsibilities. The programme brings a wide-variety of artists, curators and scholars to Leeds giving fellows time and space to pursue their own research interests. Fellowships are central to the Institute's programme generating conferences, publications and exhibitions which further the study of sculpture.

The Institute maintains close links with the Fine Art department at Leeds University. Institute staff teach and advise on the Art History MA programme and a small number of both Museum Studies and Art History students complete internship projects at the Institute. In addition the Institute is currently supporting a doctorate student working on the Helen Chadwick Archive, funded by the AHRC, in collaboration with Leeds University. Senior Fellows are also required to contribute to the Art History MA programme by providing a talk or seminar.

Outward Loans Policy

As part of its directive, the Foundation is actively involved in curating, mounting and supporting exhibitions of Moore's work worldwide, and receives many requests for exhibitions and loans per year.

Loans from Leeds' collections (including the archive at the Institute) are administered by Leeds Museums and Galleries.

Loans are made for the following purposes:

- To widen access to collections and facilitate outreach
- To help advance the education of the general public
- To contribute to a wider understanding of art
- To support research into the collections and exhibitions
- To support other museums and institutions and develop partnerships

The Foundation considers requests for exhibitions and loans from all parts of the collection.

Borrowers

Borrowers will fall into one of the following categories:

- Accredited / registered museums and galleries (however the Foundation will consider requests from those without accreditation)
- Libraries and Archives
- Educational institutions
- Public and charitable bodies, including community organisations
- The Foundation will not normally agree to loan requests from private individuals

Borrowers will need to demonstrate they can provide and maintain suitable facilities and appropriate conditions (i.e. environmental, security); however exhibition/loan requests will be dealt with on a case-by-case basis. A site visit by Foundation staff may be required to determine exactly what facilities can be provided, and the exhibition/loans will be selected accordingly.

Borrowers will also need to demonstrate that they have an ethical loans policy, where appropriate.

Exhibition Loans

- Requests for loans for exhibition should include information about the exhibition, other items being displayed and how the item fits into the exhibition
- Wherever possible the request should include accession number, object or artist's name and title
- Information on the venue, or for all venues for a touring exhibition should be included preferably using UKRG facilities reports and questionnaires (available at www.ukrg.org)
- Borrowers are asked to provide as much information as possible with the initial formal request, which will speed the response to the request
- Informal discussions are welcomed before a formal request is made to the Director

Refusals

The Foundation may refuse loans from time to time, although it endeavours wherever possible to facilitate loans. The Foundation may refuse for one of the following reasons:

- When suitable environmental conditions and/or security cannot be provided
- Insufficient time to consider and prepare the loan
- If the item is fragile, or unstable or at excessive risk of damage from handling or transit
- If the item is required by the Foundation for display, learning or outreach
- If the item has been lent frequently
- If the item is in demand from Foundation visitors
- If the request is for use as props in theatre, film or TV production
- If excessive cost would be involved in moving the item
- If the project is unsuitable or incompatible with the Foundation's aim to promote the artist
- If the artist has been displayed too frequently within the same geographical area

The Foundation will provide an explanation for any refusal. If the refusal is due to environmental or display issues the Foundation will work with the borrower to try to overcome these issues. Where a work is already scheduled for display or loan, the Foundation may endeavour to offer an alternative.

Recall of items

The Foundation reserves the right to recall any item from loan at any time. Normally the Foundation will only do so in the event of an emergency or where the borrower fails to comply with the Standard Conditions of Loan.

Notice

- Requests for loans should be made as early as possible, at least six months in advance of the date required.
- In exceptional circumstances the Foundation will consider requests with a shorter lead in time
- Where a number of items are requested, for touring exhibitions and loans overseas at least nine months notice in advance is requested.
- The Foundation endeavours to acknowledge requests within three weeks of receiving a formal request and will try to make a decision within eight weeks of receipt of a satisfactory UKRG facilities report and environmental charts. If the Foundation can not meet this schedule it will inform the borrower of a delay

Costs

Costs relating to conservation, transport, casing, insurance, and couriers are negotiated with the borrowing venue on a case-by-case basis and will be summarised in writing in advance.

Couriers

- Couriers may be required if:
 - The journey is particularly long, hazardous or unsafe
 - The item requires special handling / installation and / or is fragile
 - The object(s) is extremely rare or of high value
- Couriers are Foundation representatives and have full authority to withdraw a loan if conditions, as laid out in the loan agreement, are not met
- The borrower is usually responsible for couriers' expenses including travel, accommodation and subsistence but this may be negotiated as necessary

Incoming Loans Policy

The Foundation is committed to producing world-class temporary exhibitions and displays at both venues and in some instances for touring exhibitions as well. In order to meet this commitment, the Foundation regularly seeks to borrow works from collections and individuals worldwide.

The Foundation is committed to ensuring the highest standards are maintained whilst a loan is in its care, including packing and transport, handling, display, environment, invigilation and security.

Loans to the Foundation are requested for the following purposes:

- To widen access to works from diverse cultures and periods
- To enhance the Foundation's ongoing temporary exhibition and display programme
- To contribute to a wider understanding of art
- To showcase research into a specific artist or subject matter

Potential lenders

Lenders will fall into one of the following categories:

- Museums and galleries
- Commercial galleries and dealers
- Private collections/individuals or their appointed agents
- Practising artists or their appointed agents
- Libraries and archives
- Educational institutions

Curators working for the Foundation will alert lenders of the ethical loans policy at the earliest opportunity during the research and development of each exhibition and display.

Loans

- Foundation Curators and Research Coordinators may commence the loan request with informal discussions before making a formal request to the appropriate individual
- Subsequent requests for loans for exhibition will include information about the exhibition, other items being displayed and how the item fits into the exhibition

- A request will only be made after initial enquiries regarding legal ownership and provenance have been made
- The request will include the artist's name, title, date, full dimensions and accession number. Loan letters will not be issued without this information
- Information on the Foundation venue or for all venues for a touring exhibition will be provided using UKRG facilities reports, security and case questionnaires (or the equivalents issued by other countries)
- Lenders will be required to declare in writing that they acquired the objects by legitimate means, have legal ownership and are unaware of any third party claims. Further documentary evidence may then be required if any doubt remains
- Lenders will be asked to provide as much information as possible with the initial formal request, including insurance value, handling and display requirements
- Loans at both venues will normally be covered by the Foundation's annual insurance policy, unless lenders request other arrangements
- In accordance with the Foundation's Due Diligence Policy, lenders will be asked to provide a full provenance of the work/s. The Foundation Curators will check thoroughly the provenance and will ask the Lender for further information or proof of acquisition if the details provided give cause for any concern. The Foundation will carry out its own research in order to satisfy this requirement as necessary
- If Immunity from Seizure is requested by a lender, the Foundation will publish information of the loan, the lender and a provenance on its website in accordance with DCMS guidelines at least 4 weeks before a work enters the UK. The Foundation will also inform the MLA
- Records of incoming loans are kept for 25 years and are considered confidential

The Foundation actively encourages its curatorial staff to adhere to its Due Diligence Policy through in-house training, attendance at conferences and provision of resources on the subject.

The Foundation is able to provide and maintain suitable facilities and appropriate conditions for objects on loan. This can be demonstrated to the Lender through UKRG facilities reports and environmental readings. The MLA-appointed National Security Advisor has approved the security provisions of both venues. The Foundation will endeavour to meet any specific handling, display or security requirements the Lender may require, and will discuss this in advance of the loan arriving.

Cancellation of loans

Cancellations will always be a last resort since all aspects affecting a loan will be considered thoroughly before the Foundation makes a loan request. However, in exceptional circumstances, cancellations may be made for the following reasons:

- If a lender's terms and conditions of loan prove extraordinary and cannot be met.
- If costs associated with a loan (e.g. loan fees, conservation, crating or transport) rise to unacceptable levels
- If the insurance value given for a loan is higher than the known market value
- In the event of unrest (including war) in the country of origin
- If the Lender can not confirm that they acquired the object by legitimate means.
- If the Lender can not confirm that they have legal ownership of the object
- If the Lender is aware of any third party claims to the object
- If any information surrounding provenance is unacceptable under current national and international standards
- If evidence suggests that the object has been illegally excavated or exported from its country of origin
- Where appropriate, if the DCMS does not grant Immunity from Seizure for the loan.