

ABERDEENSHIRE HERITAGE

EXIT POLICY

Purpose

1. Exit is defined as the management and documentation of items accessioned by Aberdeenshire Heritage, or on loan to it, leaving the responsibility and care of Aberdeenshire Heritage, either permanently or for a temporary period.
2. The term “exit” is used throughout this Policy with this meaning and no other.
3. Exit refers solely to the movement of Aberdeenshire Heritage’s accessioned items and items on loan to it, which are leaving its responsibility and is not intended to mirror Aberdeenshire Heritage’s **Entry Policy**, which also governs the movement of unaccessioned material.
4. The purpose of the Policy is to enable Aberdeenshire Heritage to be accountable for all accessioned items leaving Aberdeenshire Heritage, which are on loan to it, to define the permitted reasons for exit, to define the authorisation levels for permitting exit and to define the minimum level of documentation required.

Scope

5. This Policy applies to:
 - a. All sites and branches of Aberdeenshire Heritage.
 - b. Accessioned items or significant parts of accessioned items which currently form part of the permanent collections, and which are leaving Aberdeenshire Heritage for any reason.
 - c. Items on loan to Aberdeenshire Heritage when they are returned to their owners, or which leave Aberdeenshire Heritage temporarily for any reason.
 - d. Items being moved by a contractor from one site or branch to another, or from one branch to a non-Aberdeenshire Heritage destination.
6. This Policy does **not** generally apply to:
 - a. Material moved internally from one Aberdeenshire Heritage site/branch to another by Aberdeenshire Heritage staff.
 - b. The movement of items, which are part of the Handling Collection, or to unaccessioned “props”, except when such items are leaving Aberdeenshire Heritage under the Disposal procedure.
 - c. Material moved out of any of Aberdeenshire Heritage’s sites/branches in the event of disaster or another emergency although some form of inventory will be required. Refer to the Aberdeenshire Heritage Disaster Plan for further information.
 - d. The movement of unaccessioned material.
 - e. Copies made for sale or free distribution to members of the public or other external organisations.

7. Exit is always the result of another Aberdeenshire Heritage transaction, and other procedures will dictate the exact point at which Exit comes into effect and any special conditions which may apply. The activities which will most commonly result in Exit are:

- a. Loans in (return to owner of borrowed material or temporary movement off site for any reason).
- b. Loans out (despatch of Aberdeenshire Heritage material).
- c. Location and Movement Control.
- d. Collections Care and Conservation.
- e. Deaccession and Disposal.
- f. Creation of surrogate copies.

Liability, Insurance and Indemnity

8. In all circumstances, the liability for damage and security when items leave Aberdeenshire Heritage falls upon Aberdeenshire Heritage until the receiving institution, organisation, individual or their authorised agent accepts the item and signs Aberdeenshire Heritage's Exit Form acknowledging responsibility for the item.

9. If Aberdeenshire Heritage is not using its own transport, the contractors or shippers chosen must be approved by Aberdeenshire Heritage, except in the case of a returning Loan In item when the lender has specified a contractor.

10. In certain circumstances a member of Aberdeenshire Heritage staff will be required to accompany an item as courier to ensure it reaches its destination safely.

11. When items leave the care of Aberdeenshire Heritage for any reason steps must be taken to ensure that insurance or indemnity cover is adequate, whether items are to be transported at Aberdeenshire Heritage's or the recipient's risk.

12. On occasion, where an owner has approved this method, items may be sent by the Royal Mail's *Special Delivery* service. Royal Mail's maximum liability for *Special Delivery* should be checked to make sure that the value of the item does not exceed it. If it does, then an alternative method of Exit must be found.

Authorisation

13. Only authorised staff may approve the Exit of an item from Aberdeenshire Heritage and/or the permanent collections.

14. Authorised staff must ensure that all necessary permissions have been granted before authorising an Exit transaction, liaising with the Documentation section.

15. Authorised staff are:

- Principal Museums & Heritage Officer
- Curatorial Officers

Documentation

16. Every exit transaction must be supported by an authorised Aberdeenshire Heritage business document appropriate to the case. For example, an artefact leaving Aberdeenshire Heritage on loan must have completed Loan Out documentation.

17. Aberdeenshire Heritage will document the exit of items from Aberdeenshire Heritage in order to track them and to maintain a link between the item and any information about it. The information that must be recorded is:

- a. Exit or other transaction reference number
- b. Any unique identifying numbers for the items
- c. Brief description of items
- d. Condition note
- e. Information about any hazards associated with the material
- f. Reference to appropriate file containing additional details (e.g. loan-in file, acquisition/disposal file)
- g. Reason for exit
- h. Method of despatch
- i. Aberdeenshire Heritage courier (if used)
- j. Authorising signature of Aberdeenshire Heritage
- k. Date of exit
- l. Destination name, address and telephone number
- m. On delivery – signature of authorised receiver
- n. On delivery – date of receipt
- o. If appropriate – on return – signature of receiving Aberdeenshire Heritage staff
- p. If appropriate – on return – date of return to Aberdeenshire Heritage staff

18. This information will be recorded on an **Exit Form**.

19. A form for exit may be otherwise generated, as long as it contains all the information at 17 above. If required for departmental administration, other data can also be recorded on a form recording exit as long as the form still fulfils its exit function.

20. Aberdeenshire Heritage may also be expected to provide one or more of the following documents, not necessarily related to its own systems and procedures:

- a. Customs clearance
- b. Export licences
- c. Shipping instructions/forms
- d. Insurance certificate
- e. Packing/Unpacking instructions
- f. Condition check forms

How long, and in what form, Exit Information is held

21. Exit information will be retained in perpetuity by Aberdeenshire Heritage, in electronic or manual form.

Exceptions

22. There are no exceptions to this Policy, other than those explicitly defined in the Scope section.

Review

23. This Policy is subject to review every five years. The next date for review is October 2013. The Policy may be reviewed at an earlier date if necessary.