

Permanent Collection Management Policy
The Danbury Museum and Historical Society Authority
February 2015

Updated February 2019 under the auspices of DMHSA Board of Trustees.

I. INTRODUCTION

Mission

The Danbury Museum & Historical Society Authority acquires, preserves, exhibits, and interprets Danbury's past. Situated in downtown Danbury, the museum preserves the John and Mary Rider House c.1785), the Dodd Hat Shop (c.1790), the Marian Anderson Studio, the old King Street Schoolhouse, the Little Red Schoolhouse and the Charles Ives Birthplace. Huntington Hall, a modern exhibit building, contains the museum offices and a research library.

Purpose

This policy outlines institutional practices governing: (i) acquisition, accessioning, and de-accessioning, and (ii) care and use of DMHSA's Permanent Collection. Separate policies will govern the non-permanent collections (see Collecting Policy for definitions).

Legal Status

The Danbury Museum and Historical Society Authority (DMHSA) is an Authority of the City of Danbury.

Ethics Statement

The DMHSA adheres to the Code of Ethics of the American Association of Museums, the Statement of Professional Standards and Ethics of the American Association for State and Local History, the Codes of Ethics for the American Institute of the Conservation of Artistic and Historic Works, the Code of Ethics for Archivists from the Society of American Archivists, and the Code of Ethics of the American Library Association.

II. STATEMENT OF AUTHORITY AND COLLECTING POLICY

The DMHSA Board of Trustees has the ultimate responsibility for the care, custody, control, and management of the Permanent Collection. The Board of Trustees delegates authority to the staff to administer the daily needs of physical, environmental, accessibility, and documentary care of the Permanent Collection, as overseen by the Executive Director. Collections staff is responsible for carrying out all day-to-day collection management functions as commonly accepted in museum and special collections practices. (See Gift Form, Appendix A.)

Collection staff is responsible for applying relevant archival, library, and museum standards in implementing and carrying out day to day collection management functions including acquisitions, accessioning, cataloging, de-accessioning, and research. They are also responsible for the physical care of the Permanent Collection, balancing the conservation and maintenance requirements of each item with the need for public access. Staff communicates and works with other task force groups as needed or designated by the Executive Director.

III. COLLECTION CARE AND STEWARDSHIP

Stewardship is one of the most important responsibilities of a collecting institution. It takes many forms, including maintaining a physically and environmentally secure environment, as well as maintaining proper detailed accession records; and providing for active maintenance, care, and conservation treatment of an object or group of objects. Commonly accepted standards and methods of conservation are adhered to.

All Permanent Collection items will be entered into the cataloging system appropriate to the department primarily responsible for such item. All newly acquired paper materials, including both printed and manuscript items, but not including items defined as graphics, will be entered in a “library” database. All newly acquired artifacts and graphics (photographs, prints, drawings, maps), will be entered into a “museum” database.

All Permanent Collection materials are marked with accession and/or manuscript numbers according to currently accepted best practices. Records for library materials are retained in the collection files; records for the museum are retained in the object files. Standards for digitization of Permanent Collection materials shall be maintained by staff. Digital asset management is a new and evolving area of museum and library work, and it is understood that old digital files will need to be refreshed on a regular basis, since electronic files will degrade over time, and migrated to cope with changes in technology. Current best practices for digitization are difficult to define and constantly changing. It is the responsibility of collections staff to ensure that everyone is aware of and maintains—as far as practical given the cost of technology and time—current standards of digital asset management. Digital asset management and maintenance shall be an ongoing initiative which shall be continually reviewed to ensure current standards and guidelines are being met.

The DMHSA is committed to providing its Permanent Collection with a safe and secure storage environment, continuous environmental monitoring, and protection from the agents of deterioration, to the maximum extent that available resources permit. DMHSA has traditionally taken a minimalist approach to object treatment, emphasizing conservation over restoration, in the belief that the condition of an object frequently reflects the history of its use.

IV. LOANS

Consistent with the goal of balancing access and preservation, the Permanent Collection is non-circulating¹, except when made available as a loan—as described below. Both outgoing and incoming loans shall be consistent with long-term preservation of objects and the needs of DMHSA educational and exhibition programs.

Goals of the outgoing loan program are: to increase public access to objects in the DMHSA Permanent Collection; increase public awareness of the DMHSA; and to support the broader mission of historical and cultural research, interpretation, and education; and to preserve the DMHSA Permanent Collection through conservation and/or through digitization projects funded by other institutions that require borrowing the original.

Goals of the incoming loan program are: to provide public education and access to items not in the Permanent Collection; to supplement the scope, depth, and interpretive value of the Permanent Collection; and to support the educational, interpretive, and programming activities of the DMHSA.

Outgoing Loans

A loan is defined as any transaction in which possession of a Permanent Collection item is temporarily transferred to the custody of a second party for a defined period of time, without a transfer of ownership. All DMHSA materials leaving DMHSA premises for any purpose must be appropriately documented, both before removal, and upon return. Items documented as being in short-term custody of staff acting on behalf of the DMHSA for external programs should not be considered as being on formal loan.

Permanent Collection materials may be removed from the DMHSA premises only for the following purposes: exhibition or study by another public institution; photography, microfilming, digitization, or conservation treatment; or as a development opportunity or to build awareness of DMHSA in a way designated by the Executive Director on a case-by-case basis. Outgoing loans may be made to qualified institutions (as determined by staff) for purposes of exhibition, scholarly research, or educational use. Outgoing loans may not be made to private individuals or for-profit organizations, unless such loans are: (i) required for the provision of services to DMHSA (e.g., conservation, photography, microfilming) or (ii) approved by the Board of Trustees.

Outgoing Loan Approvals

All outgoing exhibition or study loan requests must be made in writing and must state the purpose of the loan, the period of the loan, and the appropriate authorization for undertaking the loan on the part of the borrowing institution. Requests must be

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accompanied by a current copy of the borrower's *AAM Standard Facility Report* or comparable documentation acceptable to DMHSA. The advice of a conservator shall be obtained if there is any question regarding the condition of the object or its ability to withstand the stress of transportation, handling, or changed environmental conditions.

Exhibition or study loans to other public institutions require formal approval by Executive Director. Loan requests may be refused on the basis of such factors as object condition, in-house need, security and/or environmental issues of borrowing institution, or past experience. Loans for photography, microfilming, or conservation treatments, require approval by the Collections Manager or Executive Director.

Outgoing Loan Documentation

All outgoing loans must be documented by an *Agreement for Outgoing Loan* (see Appendix B). The *Agreement* specifies the identity of the borrower, purpose of loan, length of loan, object(s), accession number(s), estimated value(s), and permission for access by DMHSA staff to inspect and monitor the borrower's compliance with the terms of the *Agreement*. Any other pertinent information relating to shipping, handling, or exhibition conditions, conservation requirements, or other exceptions should be specified and agreed to in writing prior to the issuing of the *Agreement*.

The *Agreement* must be signed by the Executive Director, and either the Collections Manager or other collections staff member.

Outgoing Loan Insurance

Borrowing institutions must provide "wall-to-wall" insurance coverage for the full value of the items, as specified by DMHSA in the *Agreement for Outgoing Loan*. A *Certificate of Insurance*, in form and substance satisfactory to DMHSA staff, identifying DMHSA as an "additional insured," must be provided to DMHSA prior to the execution of the loan. Outgoing loans for photography, conservation treatment, and microfilming are insured by DMHSA. If an item is deemed particularly significant by staff when the loan is presented for approval, its particular significance should be defined by staff and appropriate UCC filings may be considered so there is no confusion about the fact that the object on loan is the property of DMHSA and not the borrower.

Outgoing Loan Condition Reports

For exhibition and study loans, the DMHSA prepares condition reports for all outgoing objects. Borrowing institutions must acknowledge the condition of the object(s) upon receipt and must provide DMHSA with immediate written notification of any damage or observed discrepancies. Condition must be rechecked by the borrower prior to return and by DMHSA upon receipt.

Outgoing Loan Expenses and Fees

For exhibition and study loans, the borrowing institution is responsible for paying a loan processing fee of \$50 per item, in addition to the costs of packing, shipping, insurance, and any necessary conservation costs. In certain circumstances, as determined by the Collections Manager or the Executive Director, a modified fee structure may be negotiated. If DMHSA requires a staff courier or an art shipper to accompany the loan item in transit, the courier's expenses must be paid by the borrowing institution.

Restrictions on Borrowers

Restrictions on borrowers are specified in the *Agreement for Outgoing Loan*. DMHSA may specify particular installation, environmental, security, handling, or shipping requirements for outgoing loan object(s). Failure to comply with such specifications or other terms of the loan will be grounds for loan recall.

Material on loan shall remain in the possession of the borrower until returned to the DMHSA; no sub-loans or transfers may be done without advance written approval from DMHSA. Borrower shall be required to repack loan object(s) for return in the same fashion in which they were received, unless changes are approved in writing in advance by DMHSA. Packing shall in all cases be in accordance with professional standards.

Credit Lines

Borrowers are required to use the credit line provided by DMHSA in all label copy, catalogs, press releases, promotional and other materials. Such credit lines shall be stated on the loan documentation and shall include the name of the donor if applicable.

Inappropriate Outgoing Loans

The DMHSA does not loan Permanent Collection materials for purely decorative purposes, for commercial purposes, or to private individuals for any purpose. In no instance should the DMHSA name or the loaned item be connected with any product endorsement without the approval of the Executive Director and Board of Trustees.

Appropriate Incoming Loans

The DMHSA may request and implement incoming loans from public or private owners, principally for purposes of exhibition, study, or photography. Such loans must be limited to a specified period of time, not to exceed one (1) year. At the end of the specified loan period, the item(s) shall be returned to the lender in a timely fashion. DMHSA shall not provide free storage, conservation treatment, or insurance to lenders beyond the agreed loan period. Incoming loans may be renewed on an annual basis, with the approval of the appropriate staff. No new loans of indefinite duration will be accepted by the DMHSA.

Approval and Documentation of Incoming Loans

All requests for incoming loans must be made in writing and must state the purpose and period of the loan. (See Appendix C.)

DMHSA will comply with lenders' reasonable conditions for such loans and will exercise the same diligence with respect to preservation and security as it does its own collection. The DMHSA will abide by the terms of the lender's loan agreement unless otherwise specified prior to commencement of the loan.

Incoming Loan Insurance

The DMHSA insures objects borrowed for exhibition or study through its fine arts policy. Values are provided by the lenders subject to DMHSA review.

Long-term Loans

As of 2015, the DMHSA no longer enters into new long-term or open-ended loan arrangements or deposits. Pre-existing long-term loans or deposits will be subject to the above guidelines of annual renewal.

Periodic on-site inspections of long-term outgoing loan items should be made to document condition of objects.

Old Loans

"Old loans" are defined as expired loans. Unclaimed objects from these loans whose owners cannot be located are considered abandoned.

The DMHSA abides by any Connecticut state legislation regarding abandoned property. In the absence of such legislation, the DMHSA shall not accession any items into the Permanent Collection without first conducting due diligence in locating the owner, heir, or authorized agent of the item.

Full documentation of efforts to locate the owner shall be permanently maintained in the loan and object files. In the absence of legislation, a course of action regarding old loans should be reviewed and approved by the Executive Director on a case-by-case basis after consultation with legal counsel, when and where appropriate.

Unsolicited Loans

It is the policy of the DMHSA not to accept undocumented, unsolicited loans. Any object(s) brought to DMHSA and left by the owner for purposes of identification, study, or as a possible gift or loan shall be recorded on a *Temporary Custody Receipt* stating the owner's name, address, and the reason for leaving the object(s). Failure by the owner to remove such objects from DMHSA, upon request by DMHSA, may result in disposal or treatment as a gift.

V. OBJECTS IN CUSTODY

Objects in custody are items for which DMHSA is responsible but whose legal status is unclear. The three major categories of objects in custody are:

- Items that are found in the collection for which no documentation can be located
- Documented loans that have not been reclaimed by the owner of record and for which a current owner cannot be located
- Unsolicited objects that have not been reclaimed by the owner.

Undocumented objects in the collection may, at the discretion of collection staff, either be accessioned or disposed of. Non-accessioned objects found in the collection that have ownership information should be dealt with according to current Collecting Policy guidelines or appropriate Abandoned Property or related legislation.

Old documented loans should be dealt with in accordance to Old Loans, under Section IV. LOANS.

DMHSA does not currently accept custody of objects unless they are documented as possible acquisitions or loans. Unsolicited objects (which DMHSA staff shall attempt to keep to a minimum) shall be documented with a *Temporary Custody Receipt* recording the following information: date of receipt, owner's name and contact information (mailing address, telephone, e-mail address), a description that is detailed enough to identify the object(s) with certainty, reason for leaving the object at the DMHSA, and whether the owner would like the object returned. The receipt should state that 1) the objects listed were left at the owner's initiative and risk, and 2) provide notification that any objects not picked up 60 days after notice of intent to return shall be considered the property of the DMHSA, to be disposed of or accessioned at DMHSA's discretion. This receipt must be signed by the owner or his/her agent prior to leaving the unsolicited object in DMHSA custody, and the DMHSA staff member accepting the object(s). DMHSA shall endeavor to provide reasonable care for objects in custody, but may not provide insurance for such objects, unless it is to DMHSA's benefit to do so.

DMHSA typically does not enter into Repository Agreements with outside groups or agencies. Existing agreements or arrangements will continue to be honored.

Claimants to an object in custody must provide evidence to support claims of ownership, including a formal statement indicating they are the sole party of interest or are authorized to represent all parties of interest.

VI. ACCESS AND USE OF THE PERMANENT COLLECTION

To carry out its mission, DMHSA strives to make all Permanent Collection materials as accessible as reasonably possible consistent with responsible stewardship and available resources.

Permanent Collection materials may be used for scholarly or personal research; teaching or interpretation purposes in conjunction with school visits, tour group visits, family programs, lectures, or cultivation programs; display or exhibition within the DMHSA; or outgoing loans to appropriate qualified institutions (as determined by DMHSA staff). All requests for access to Permanent Collection materials will be considered in light of such factors as the condition of the material, its rarity or duplication within the Permanent Collection, its relevance to the proposed activity, and the ability of the staff to provide adequate levels of care and security for the original material. Permanent Collection materials may not be used in live demonstrations or re-enactments.

Methods and Conditions of Access

Methods of making the Permanent Collection accessible include, without limitation as determined by DMHSA professional staff: (i) personal examination of materials; (ii) display of materials in DMHSA exhibitions; (iii) loans of materials to other qualified institutions (as determined by DMHSA professional staff) for exhibition or study; (iv) production and distribution of photographic or facsimile reproductions; (v) research and publications; (vi) presentation in school or adult programming; and (vii) provision of images and information in response to remote inquiries received.

For security purposes, researchers using DMHSA materials are required to register in writing, providing name and contact information, and one current form of photo identification. All researchers must be accompanied by staff at all times. Visitors will be informed of procedures and conditions necessary for the security and preservation of the Permanent Collection and will be required to comply fully. Non-compliance will result in withdrawal or refusal of access or referral to law enforcement.

Exhibitions

Use of the DMHSA Permanent Collection in exhibitions is a priority of DMHSA. Objects must be displayed in accordance with good stewardship practices. Exhibited objects should be available for research or examination if possible; some objects may not be accessible due the nature of the installation. All objects considered for inclusion in an exhibition need to be reviewed by appropriate collection staff and evaluated for potential research needs, as well as their condition, exhibition environment, and duration of exhibition. Final authority, should a dispute arise, rests with the Executive Director. Exhibition label copy must include donor credit lines. A final checklist of all exhibited items including accession, manuscript, or call numbers, must be provided in the exhibition folder for ultimate inclusion in the DMHSA archives.

Educational Programs and Public Outreach

Education programming is a vital component of the DMHSA mission. Accordingly, appropriate use of Permanent Collection items in school and adult programs and family

programs is allowed and encouraged, so long as prudent and appropriate standards of care and security are observed. Items may be used in off-site programming with the advance approval of appropriate collection staff. (See Section IV. Loans – Outgoing Loans)

Online Access

The DMHSA is committed to using evolving electronic technology and ongoing cataloging to increase access to the Permanent Collection. To this end, the DMHSA actively pursues funding to support the creation of digital records and images and participates in collaborative access projects and opportunities as resources allow.

Limitations

Access to the Permanent Collection will not be limited except as necessary to secure and preserve holdings or to comply with legal or contractual obligations. Conditions that may restrict access include security or safety concerns, incomplete processing, fragile condition, use in exhibitions, unavailability due to loans, or temporary donor- or source-imposed restrictions. Certain sections of the DMHSA institutional archives are not open to researchers and may only be open to certain members of the DMHSA staff; these include personnel records, acquisition records, donor records, financial information, privileged correspondence, and other materials that may be required by law to be kept confidential.

Staff Assistance

Staff will assist researchers by providing access to the Permanent Collection as necessary and within reason in light of available resources, along with answering basic queries.

Researchers whose projects require extensive assistance, as determined by staff, will be directed to the Research for Fee program.

VII. RISK MANAGEMENT

Security of visitors, employees, and the Permanent Collection is of paramount importance. To this end, a variety of security measures have been put in place, including: fire detection, alarm, and suppression systems; burglar and intruder alarms; limited key access; compliance with current building and fire codes; and staff training. All staff members should be aware and alert to any problems in the building and should alert the facilities management and/or collection staff to any issues.

Maintenance

Preventive maintenance schedules for equipment and pest management programs are established and maintained by facilities management staff in conjunction with appropriate contractors.

Emergency/Disaster Response

A DMHSA Emergency Response Plan, written in 2011, covers all of DMHSA. A collection-specific disaster response plan does not exist and will be drafted in the future to guide staff if any event endangers the safety or security of the Permanent Collection. Any and all such plans shall be reviewed and updated every 3 to 5 years, if practicable.

Insurance

All DMHSA Permanent Collection items on premises are self-insured. Permanent Collection items in transit are covered to the limits specified by the fine arts insurance policy; items stored off-site are covered by the fine arts policy as are objects taken off-site for conservation, photography, microfilming, or for education talks and programs. The policy for insurance on incoming or outgoing loans is stated above in Section IV. Loans. DMHSA does not insure deposits, temporary loans, or items being considered for acquisition. If depositors or lenders wish their items to be insured while on DMHSA premises, they must arrange for their own insurance.

VIII. INTELLECTUAL PROPERTY RIGHTS

Copyright and Publication

It is DMHSA's aim to assist researchers, scholars, students, and the general public in every reasonable way in their efforts to study Connecticut history and publish the results of their research. All reproductions and publications from the DMHSA collection are governed by U.S. copyright law. All researchers must agree that any use made of reproductions will conform to applicable copyright law provisions. The publisher must agree to hold DMHSA harmless with regard to any claims, damages, and/or costs/expenses that the publisher or author(s) may incur as a result of publishing materials housed in this institution. *DMHSA grants only such rights as we hold and does not guarantee that we hold all rights.*

Permission to Publish and Permission Fees

Permission must be obtained in writing from appropriate collection staff to publish or exhibit photographic reproductions of any Permanent Collection materials, or to quote from manuscript or copyrighted materials. Publishing includes, but is not limited to, printed and electronic formats. Permission for use in programs or presentations is not required; however, the credit of "Courtesy of The Danbury Museum and Historical Society Authority" should be noted. All permissions are granted as one-time, nonexclusive licenses with conditions as stated on the *Application for Permission to Reproduce*. A fee applies to certain types of publication or exhibition use. Fees will be charged according to an established fee schedule. Permission will not be fully granted for publication until all fees have been paid in full.

Permanent Collection Photography and Reproductions

Photography and digital scans of Permanent Collection items are produced for documentation and publication purposes by designated staff, or by professional photographers on a contract basis.

Photography and/or digital files of Permanent Collection material may be provided to individuals or organizations; upon written request and payment of applicable fees, according to an established fee schedule.

Study Photography

Study photographs for personal use are permitted with the approval of collection staff and following current *Research Center Regulations* available in the Research Center. A *Permission for Collections Research Photography* form detailing items photographed should be completed for both the DMHSA's and the researcher's records. Such photographs may not be published without written permission and payment of relevant fees.

Press Photography

Photography by official representatives of print and electronic media is permitted with the approval of appropriate staff. Such press photography is permitted free of charge provided it is conducted explicitly for the purposes of publicizing the DMHSA, and that stipulated credit lines are published. Such press photography must be carried out in compliance with any conservation or handling restrictions stipulated by the DMHSA. Photography by any representatives of print or electronic media, for any purpose other than the express promotion of the DMHSA, is subject to the same regulations and procedures as all other photography for publication including the payment of applicable permission fees.

Facsimile Reproductions

DMHSA may occasionally allow facsimile reproductions of Permanent Collection items. Such reproductions require a mutually acceptable contract and the payment of applicable licensing fees.

IX. CULTURAL PROPERTY

DMHSA will not knowingly acquire objects prohibited by law or the Collecting Policy and will be sensitive to the requirements of the creators or their descendants about how certain objects are managed in the collection. DMHSA abides by the guidelines

governing cultural property as stipulated by the Native American Graves Protection and Repatriation Act (NAGPRA).

X. DEACCESSIONS

Definitions

- *Deaccessioning*: Deaccessioning is the formal removal of an object from the Permanent Collections. Deaccessioning is the opposite, or reversal, of accessioning.
- *Disposal*: Disposal refers to what happens to an item after it has been deaccessioned.

Purpose of Deaccessioning

Deaccessioning is conducted in strict conformity with DMHSA's public trust responsibilities the AAM Code of Ethics for Museums, and AASLH guidelines, and House Bill No. 5355, Public Act No. 12-171, "AN ACT CONCERNING MUSEUM PROPERTY," effective October 1, 2012, which addresses the issues of loans and abandoned property in museums and libraries

(<http://www.cga.ct.gov/2012/ACT/PA/2012PA-00171-R00HB-05355-PA.htm>).

Deaccessioning is undertaken primarily for the purpose of focusing, refining, and upgrading the DMHSA collections, in support of the DMHSA Mission and public trust responsibilities.

Process of Deaccessioning

Criteria: Material may be deaccessioned if it meets any of the following criteria:

- a. It falls outside of DMHSA's collecting scope.
- b. It is in poor condition.
- c. It has physical properties that threaten other materials, such as mold or insect infestation.
- d. It duplicates material already in the collections.
- e. It is of inferior quality.
- f. It has no provenance or no object history.
- g. It is peripheral to DMHSA's mission and has greater relevance to another collection.

Missing or stolen objects may not be deaccessioned. The corresponding records should be marked appropriately as of the date the loss is noted.

Approval of Deaccessioned Items: All deaccessions from the Permanent Collections must be approved by staff appointed by the Executive Director. Records will be kept regarding deaccessioned materials and these may vary. Staff in charge of collections may decide, with approval of the Executive Director, what level of documentation of deaccessioned items is necessary (some paper materials may be sold as lots, for

example.) Once approved by the Executive Director and Collections Staff, items will be presented at a Board of Trustees monthly meeting for deaccession discussion and vote, and then presented a second time at the next subsequent Board of Trustees meeting for final assessment and vote to deaccession.

Disposition of Deaccessioned Items: Deaccessioned objects may be disposed of by public sale, competitive bid by commercial vendors, transfer of ownership to another public institution, repatriation according to NAGPRA regulations, or transfer to the Non-Permanent Collections. If sold, items from the print, manuscript, broadside, map, and ephemera collections may be disposed of by sale to dealers by closed bid. Public auction is the preferred method of selling other deaccessioned items. Collections items that are severely deteriorated, or composed of hazardous materials, may be destroyed by a safe and appropriate method.

The following methods of disposal are not acceptable for deaccessioned collections materials:

- Sale in the museum shop.
- Sale, exchange, gift, or transfer to private individuals or dealers.
- Private sale, exchange, gift, or transfer to DMHSA staff or Board members, their representatives, or immediate family members. In the event of public sale, such individuals shall be eligible, as any other private individuals, to bid on offered items.

Accession numbers or other DMHSA collections identification will be removed from deaccessioned items when feasible. Such identification will not be removed if in case where the item is being transferred to another public collection, removal would damage the material, or the number is determined by the Head of Collections to have significance in preserving the known history of an item.

Disposal of Non-Accessioned Acquisitions

Occasionally, items are given or bequeathed to DMHSA that are not appropriate to the Permanent Collections; other items may be given with the explicit understanding of both parties that they will be sold to benefit the collections. Such items are not accessioned and are not subject to the rigorous approval process for deaccessioning. Documentation of the receipt and disposal of such objects should be permanently maintained.

Use of Proceeds from Deaccessioning

All proceeds from the sale of collections materials are applied to acquisitions or care of collections.

XI. BEQUESTS

Bequests for Unrestricted Purposes can be given to the DMHSA, we ask that you submit a letter with your intentions, and several photographs if you intend to donate an artifact and offer the possible avenues for gifting language below.

A general unrestricted bequest is particularly valuable, as it can be used to address the greatest need.

For a bequest of artifact(s), the possible language is: “I give the Danbury Museum & Historical Society the (specified artifact(s)) to be used for the benefit of the Danbury Museum & Historical Society Authority.”

For a bequest of securities, the possible language is: “I give the Danbury Museum & Historical Society all my shares of XYZ stock or mutual funds to be used for the benefit of the Danbury Museum & Historical Society Authority.”

For a bequest of cash, the possible language is: “I give to the Danbury Museum & Historical Society (insert amount) to be used for the benefit of the Danbury Museum & Historical Society Authority.”

If you cannot or do not want to specify the exact amount or nature of the intended gift, a proportional bequest is often the best way to accomplish your goals. We would receive a percentage of the estate or residue of the estate, after all the other provisions have been met. Possible language is: “I give to the Danbury Museum & Historical Society Authority (insert percentage) of my estate, or (insert percentage) of the rest, residue, and remainder of my estate to be used for the benefit of the Danbury Museum & Historical Society Authority.”

Contingent Bequests:

A contingent bequest takes effect only if the primary intention cannot be met (e.g. if the primary beneficiary does not survive the donor.) This ensures that property will not be distributed to unintended beneficiaries.

Possible language is: “If (name of primary beneficiary) does not survive me, or shall die during the administration of my estate, or as a result of a common disaster, then I give to the Danbury Museum & Historical Society Authority the rest, residue, and remainder of my estate, to be used for the benefit of the Danbury Museum & Historical Society Authority.”

Bequests for Restricted Purposes:

If you would like to honor a family member or special person or provide support for a specific program or department that was meaningful to you, then you can designate

your bequest specifically for that purpose. You simply use any form of the possible language included above and specify a particular use after “for the benefit of.” Often, specific guidelines govern the use of these types of funds. Therefore, we recommend that you contact us to discuss your restricted gift.

Updated and agreed upon by the Danbury Museum & Historical Society Board of Trustees February 21, 2019.

Appendix B

The Danbury Museum & Historical Society
43 Main Street
Danbury, Connecticut, 06810
www.DanburyMuseum.org
203.743.5200

OUTGOING LOAN AGREEMENT

Purpose of Loan: _____

Inclusive Dates of Loan:

Borrower: _____ Address: _____

Contact: _____ Email: _____

Telephone: _____

Credit Line: _____

Accession #	Object	Value

Total Insurance Value:_____

Authorizing Signatures

Lender:_____

Date:_____

Borrower:_____

Date:_____

Item condition notes and or special instructions/limitations:

Appendix C

The Danbury Museum & Historical Society
43 Main Street
Danbury, Connecticut, 06810
www.DanburyMuseum.org
203.743.5200

INCOMING LOAN AGREEMENT

Purpose of Loan: _____

Inclusive Dates of Loan:

Lender: _____ Address: _____

Contact: _____ Email: _____

Telephone: _____

Credit Line to read: _____

Object	Value	Condition

Total Insurance Value:_____

Authorizing Signatures

Lender:_____

Date:_____

Borrower:_____

Date:_____

Item condition notes and or special instructions/limitations:
