



CHELMSFORD HISTORICAL SOCIETY

Collection Management Policy



SEPTEMBER 21, 2021

CHELMSFORD HISTORICAL SOCIETY INC.
40 Byam Road, South Chelmsford, MA 01824

Chelmsford Historical Society Collection Management Policy

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A Brief History of the Chelmsford Historical Society

The Chelmsford Historical Society (hereafter the “Society”) was formed on 7 October 1930 and is dedicated to preserving the historical heritage of the community. Incorporated as a non-profit organization in 1963, it is comprised of a President, a Board of Directors, and many members. Over the years, the Society’s collection of artifacts from the life of the town has grown steadily with collectibles from all periods of Chelmsford’s growth—the contemporary as well as the early days. The collection was originally displayed in the Adams Library and was subsequently displaced to the 1802 Schoolhouse when the library needed room for expansion. The growing collection quickly outgrew the cramped quarters, and some items were stored in members’ attics. The need for a permanent home where the Society’s accessions could be displayed for townspeople and visitors was fulfilled in 1968 when Albert and Sophie Murray generously donated their residence at 40 Byam Road to the Society. Under the conditions of the gift, the Society established a capital fund that was intended to provide income for maintenance of the building and grounds. The Museum Trust is managed by seven trustees who are recommended by the President of the Society and approved by the Board of Directors.

Beginning in 1969, the Society sponsored study programs bringing in experts to help manage and interpret the vast collection. The original Barrett-Byam Homestead collection consisted of five main rooms in the house portion of the complex and opened its doors to the public in December 1970 with the collection on display throughout. Over the years, many changes and improvements have been made to the facility to provide additional exhibit space. The Donald H. Fogg Memorial Room was dedicated on May 30, 1976, to the memory of all Chelmsford citizens who have served in the armed forces, including former Chelmsford High School teacher Donald Fogg. The Watt-Stevens Educational Center was dedicated on May 2, 1982, fulfilling the dreams of Mr. Charles Watt and Miss Hazel Stevens to have a meeting room and supplementary exhibit space to showcase additional artifacts. Through the dedicated efforts of many members of the Society, the upper section of the old barn was converted into a Country Store exhibit and dedicated on May 5, 1991. In September 2010, the former barn cellar was transformed into the Ralph Parlee Agricultural Center with the unveiling of Donna Burger’s painting of Mr. Parlee in his strawberry fields.

The Society has offered guided tours, programs, and specials events throughout its history, including hosting curriculum-based educational field trips of all Chelmsford’s third grade students during the 1970s and 1980s, Christmas Open Houses starting as the first public program offered in 1970, Antique Auto Meets, Farm Fairs, Flea Markets, and Sunday afternoon speaking programs highlighting many of Chelmsford’s stories and its people. Some of the more nationally recognized Chelmsford-based items in the collection include Roby Swords, Chelmsford Glass, Chelmsford Ginger Ale, Byam Matches, and the country’s first town history, *The History of Chelmsford*, written by Wilkes Allen (1820). While interest in Chelmsford’s history has blossomed during times of national and local celebrations, the Society remains a steward of preserving the items in the collection and making these treasured resources available to the public.

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The Society's Mission and Vision Statement

The mission of the Society is to stimulate excitement, curiosity, and research into Chelmsford's history and its people. The mission is accomplished by collecting, protecting, and conserving appropriate and historically significant artifacts that relate to the town. By exhibiting and interpreting these artifacts, we strive to create engaging and enjoyable encounters ensuring that the people can discover and learn from our heritage.

Our vision is to:

- Promote the understanding and appreciation of Chelmsford's history to the community.
- Foster an environment of teaching and learning that strengthens our sense of community.
- Responsibly preserve and maintain the history of Chelmsford.
- Maintain standards and best practices as defined by the American Alliance of Museums for the development, care, and preservation of our collection, buildings, and property.
- Expand our knowledge about current museum practices and trends.

Statement of Authority

The Society is a privately funded, volunteer, not-for-profit organization governed by a Board of Directors. The Board is charged with the general administration, control, and direction of the Society's collection and affairs including management of all monies and property.

A Statement of Purpose and Mission for the Collection Policy

The collection belonging to the Society represents pieces of the lives of those who came before us. They are held in trust for the public good and are fundamental to the Society. Therefore, this document is written to provide clear standards of operation concerning the acquisition, documentation, preservation, and care of the Society's collection. The purpose is to provide a framework of safety, integrity, and continuity for future operation of the Society.

Scope of Collection

The collection is the tangible expression of the mission and consists of many objects including farm tools, household items, clothing, and furniture mostly from the 1800s, documents from the 1600s onward, and many photos and books. The collection could be improved by the accession of objects that reflect other industries in town like the mills of North Chelmsford, schools, immigration, sports, and the progress of technology.

The Society does not collect living organisms, hazardous materials, damaged objects, or objects that do not support the goal of the Society's mission and vision statement.

The Curator, as a member of the Board, oversees and makes recommendations to the Board concerning the care, use, preservation, and storage of the collection and approval of loans to and from the collection. The Curator also works with the Accessions Chairperson to accept new items into the collection.

Acquisitions

An acquisition refers to something obtained by The Society. Acquisition does not necessarily mean that a transfer of ownership has taken place. The Society will acquire items either by donation, bequest, or purchase. An "Acquisition Questionnaire" form shall be filled out to provide baseline information about each item or group of items under consideration for accession.

A "Temporary Custody Receipt" form shall be filled out for all objects in the Society's custody while waiting for approval to be accessioned into the collection. The Society shall decide within 60 days of receipt. See "Conditions Governing Temporary Deposits."

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Each item to be added to the collection is subject to approval by the Accession committee, based on its relevance to the history of Chelmsford, and that:

- It can be cared for long term
- It is of historical interest in keeping with our mission statement and scope of the collection
- Its ownership is not in question
- It is in reasonably good and complete condition
- It has documentation as to what it is, how it was used, who used it, and who donated it

Accessions

Accessions refer to those items that are part of the collection and have accession numbers.

Once an object is approved, a “Deed of Gift” form shall be filled out and signed by the Accession Chairperson and Donor. All donations to the Society will be outright, unconditional, and irrevocable gifts and will become the complete and total property of the Society at the time of the Donor’s signature on the Deed of Gift. In the event the object is not accepted for accession, the Donor has 30 days to retrieve said object after which time the Society may dispose of it. See “Terms and Conditions for Artifact Donations.”

The Accession committee must keep a written and photographic record of all accessions both in the collection database, Past Perfect, and in a paper copy. Each object acquired for the permanent collection is given a permanent, unique number using the standard Trinomial System, for example: 2021.5.12 where “2021” is the donation year, “5” is the sequential number for that accession, and “12” is the sequential number for the specific item within the accession. This composite number is applied to each item and its associated documentation. The Accession Chairperson will report all new accessions to the Board during regular meetings.

Found in Collection / Objects in Custody

As a rule, all items found in the collection with no documentation to indicate the ownership shall be assigned a standard trinomial number like other accessions, but the second part shall always be 00. An exception to this rule applies when Photos and Archives, generally 8 ½ x 11 or smaller, have been documented as part of a previously established container system. These items shall be numbered in the same way except that the second and third parts shall correspond to the box where these items are to be stored in the library or workroom.

These objects shall be tagged with the number and recorded in the Past Perfect collection authority file “Found in Collection” until Society records are sufficiently researched to provide assurance that no records concerning the object shall be found.

Objects cannot be accessioned or disposed of if the Society has no legal ownership. Massachusetts General Laws Part II, Title II, Chapter 200B, Section 5 provides for acquisition of title by a museum to property when identity of a lender is unknown.

Documentation / Inventory

Ongoing documentation of an object’s accession, location, loan history, condition, etc. shall be kept in Past Perfect digitally (with periodic external backup).

To assure proper preservation, care, integrity, and accountability of the collection, the Curator shall conduct inventories in one location each year, scheduled such that these locations are all covered in a ten-year cycle:

- Main house first floor: Military room, Keeping room, Parlor, Dining room
- Main house second floor: Master bedroom, Children’s room, Office, Library
- Main house third floor: Attic
- Center Barn: Country Store, Newspaper storage
- Rear Barn: Watt-Stevens Hall, Ralph Parlee Center

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Using the previous electronic master inventory list sorted by location first and accession number second, confirm the location, accession number, and condition of all items. Create a new electronic inventory master list that corrects all discrepancies from the previous list. All un-accessioned items Found in Collection shall be assigned accession numbers as described above and added into the new master inventory list.

In addition, all changes shall be recorded in the Past Perfect 5 archival management system database. Note: Not all items accessed between 1930 and 2001 have been entered into Past Perfect and this is an ongoing process. For future reference, paper copies of the new inventory shall be organized into clearly marked notebooks.

Deaccessioning

The Society must be able to protect and improve the quality of its collection through the process of deaccessioning. If an object is no longer in presentable condition, beyond repair, stolen beyond reasonable expectation of recovery, a duplicate, is hazardous to health or safety, or no longer supports the Society's mission, it can be deaccessioned and disposed. Before considering an item for deaccession, the records must be reviewed to ensure that the terms of any gift, bequest, or conditional purchase would not be violated. As a courtesy, the Society will make a reasonable effort to contact the Donor or closest living relative and notify them of the deaccession intent and how this action will benefit the collection. Objects that are candidates for deaccession will be brought up at the regular Board meeting by the Curator using the "Recommendation for Deaccession" form. A majority vote of the Board shall determine the final disposition.

Disposal

Once an object is deaccessioned, the reason for deaccessioning, date, and method of disposal will be documented and added to the object's permanent file. Use the "Record of Final Disposition" form.

Accession numbers cannot be re-used once an object is deaccessioned. All identifying marks, tags, and numbers are to be removed from an item before disposal.

There are several methods of disposal: donation/trade, sale, or destruction. Items to be disposed of may be donated or traded to qualified non-profit museums, schools, or similar public institutions. Objects may be sold by a reputable, disinterested third party at public sale or auction. Proceeds from the sale of deaccessioned objects will be placed in a separate account and used only to purchase new acquisitions or for conservation and preservation of the current collection. If an object is hazardous, it must be destroyed in a safe and appropriate manner. Any destruction of objects shall be documented and witnessed by an impartial observer.

Loans

The Curator and the Board of Directors are responsible for loans to and from the Society's collection. The Curator must approve all loans. Proper documentation of all loans is required to avoid a) loss of the Society's property to another institution and b) legal and costly ramifications to search for and notify a lender of unclaimed property. The "Loans" form shall be numbered with the year and sequential number of the loan that year, like the first two terms in the trinomial system as described above.

Incoming Loans

- Upon ratification of this Collection Management Policy, loans to the Society are accepted only for a prearranged use and for a defined period.
- The "Loans" form must be completed and signed before the Society can accept the loan.
- The Society gives loaned items the same degree of care and preservation given to items in our own collection and implements any special care instructions noted on the "Loans" form. Any damage to the item while it is on loan must immediately be reported to the lender.
- Insurance coverage, if needed, shall be provided by the Society. This may be waived by agreement with the lender.

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- The Society allows others to photograph or copy loaned items only with the lender's written permission.
- All loaned items will be returned to the lender at the end of the specified loan date. If the lender or Society wish to terminate the loan before the specified date, written notice must be received/sent 30 days prior to termination of the loan. Refer to Massachusetts General Laws Part II, Title II, Chapter 200B Section 4 concerning termination of a loan.
- In the case of a lender's death, the lender's representative must notify the Society in writing, giving the full name and contact information of the new owner.
- The Society is not responsible for the destruction or damage of loaned items caused by acts of nature, acts of war, invasion, foreign enemies, civil commotions, or any military or usurped power whatsoever.

Outgoing Loans

- No item may be loaned out unless the Curator establishes that the object(s) are in such condition as to withstand ordinary strains of packing, shipping, and exhibition.
- The "Loans" form must be completed and signed prior to shipment.
- The borrower shall be responsible for all packing and transportation costs.
- The borrower shall give objects lent from the Society's collection the same care, according to prevailing professional museum standards, as it does to its own property and implement any special care instructions noted on the "Loans" form.
- Terms of insurance will be negotiated between the Society and the borrower.
- The borrower must immediately report any damage to the item while it is on loan.
- No alteration, restoration, or repair will be undertaken without the written authorization of the Society.

Intellectual Property

All records and documents pertaining to the collection must remain the property of the Society and be open to responsible public examination for use at reasonable hours, except for collection valuation information.

Risk Management

Risk management starts with staff and education. The Board of Directors is responsible for identifying and eliminating or reducing risk to visitors, staff, the collection, and buildings. All members are encouraged to expand our collective knowledge about current museum practices and trends. Procedures and policies in place for this purpose include:

Preservation / Care

The Board of Directors is charged with the general administration, control, and direction of the Society's collection. The first rule of preserving the collection is to do no harm. The Museum Manager oversees proper maintenance of house and grounds, pest management, and environmental controls maintaining the relative humidity between 35-60 percent and the temperature between 65-72 degrees in the main house. Natural light is avoided near collection material with the use of window shades. The Curator oversees proper storage, exhibition, documentation, and conservation of the collection and shall provide periodic training to all staff on the proper care and handling of the collection. Food is not permitted in gallery space and smoking is prohibited in all buildings. Public programs shall be designed to minimize danger to all artifacts. Rare or fragile objects shall not be used in demonstrations or hands-on activities.

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Conservation

If repairs or conservation are required, the Curator shall consider historical significance, condition, request for exhibition, and financial resources when justifying the necessity of such treatment. All repairs shall be performed by skilled museum professionals who adhere to standard museum practices. Documentation must be recorded including a pre- and post- treatment report.

Fire and Theft

Smoke detectors, fire alarm and intruder alarm systems are provided by and monitored by Mellonics Alarms Inc., who notifies the Chelmsford Fire and Police Departments. There is also a Knox Box for immediate key entry into the building by the Fire Department. Fire extinguishers and evacuation routes are located throughout the property. Keys are kept by the Vice President and distributed as needed with approval of the Board.

Disaster and Emergency Plans

The Museum Manager and Curator are responsible for coordinating the development and maintenance of the Disaster/Emergency Preparedness Plan to ensure the protection of the collection against all types of disasters.

Insurance Coverage

Insurance is provided by Norfolk and Dedham Mutual Fire Insurance Co., overseen by the Kaplansky Insurance Agency in Chelmsford, 978-256-0900. Insurance is annually reviewed by the Society Trust Treasurer.

Code of Ethics

The stewardship of the collection entails the highest public trust and carries with it the responsibility of care, documentation, accessibility, and responsible disposal of items in the collection. All actions of Society members, volunteers, and Society's staff shall be such that they avoid apparent and actual conflict of interest with all aspects of museum operations and collection. Staff and volunteers will ensure that the collection is properly cared for and will uphold to the standards set forth in the American Alliance of Museum's "Code of Ethics for Museums" and "A Legal Primer on Managing Museum Collections" by Marie C. Malaro.

Appraisals

Members of the Board are prohibited from providing appraisals, written or verbal, except for internal use in estimating values for purchases or deaccessions, or determining insurance valuations. Donors desiring to take an income tax deduction must have an independent appraisal made by a qualified appraiser concerning the value of their gift.

Review / Revision

The Curator shall determine when a formal review and revision of the Collection Management Policy is necessary, usually every three years, to maintain its validity and usefulness in guiding staff and Board members. In considering revisions, the Curator shall be guided by current AAM standards and best practices. The Curator shall submit proposed revisions to the Board for final approval.

Appendix Forms and Conditions

Acquisition Questionnaire

The history of an object provides valuable information for research and interpretation. Please take a moment to answer as many of the following questions as apply.

Donor Name: _____

Phone(s): _____ Email: _____

Street Address, City, State, ZIP: _____

Description of object:

How did you acquire? When? Where?

Previous owners?

Names, dates, location and/or anyone else who may have information about this object:

Do you have any information about the manufacture of this object?

Maker, where, when, materials, how used/purpose:

Do you know of any changes made while in your care or previously?

Do you have any other materials relating to this object: bill of sale/receipt, photos, letters, etc.? _____

If yes, would you be willing to donate originals or copies? _____

Has object been appraised? Can you provide a copy? _____

Has object been exhibited? If yes, when, and where? _____

Has object been mentioned or reproduced in any publication? When and where?

Are you the copyright holder or, can you provide info for the copyright holder?

Additional comments:

Thank you for your time and effort in completing this form.

Temporary Custody Receipt

This is to acknowledge receipt of the items listed below by the Chelmsford Historical Society from:

Name: _____

Date: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____ E-mail: _____

Object Description:

(attach extra sheets if needed)

The items listed above are left in the custody of the Chelmsford Historical Society to be considered as:

- An unconditional donation. The Society reserves the right to keep, lend, or otherwise dispose of the donated material.
- To be considered for acquisition.
- For identification. Does not constitute an authentication; will not include appraisals.
- To be photographed for addition to the Society's archives/library.
- For other. Please specify: _____

Disposition if not accepted for accession:

- Patron will pick up.
- The items shall be considered an unrestricted gift, become the property of the Society, and may be transferred to another institution, sold, or discarded.

I have read "Conditions Governing Temporary Deposits" listed below and agree to the conditions therein.

Received from: _____ Date: _____
(Signature)

Received by: _____ Date: _____
(Signature of Society's Representative)

Conditions Governing Temporary Deposits

1. If the items described on the face of this receipt are accepted for donation to the Chelmsford Historical Society, the depositor will be notified in writing within sixty (60) days and a “Deed of Gift” and “Acquisition Questionnaire” forms and will be sent for signature.
2. If any items are not selected for donation, the depositor will be notified in writing and will have thirty (30) days from the date of notification to reclaim this property.
3. Should the depositor fail to reclaim deposited items within thirty (30) days of notification, the items shall be deemed an unrestricted gift and they become the property of the Society and may be transferred to another institution, sold, or discarded.
4. The Chelmsford Historical Society (hereafter referred to as the Society) will exercise reasonable care regarding items on temporary deposit. The depositor hereby releases the Society from all liability with respect to any loss or damage to the items referred to on the face of this receipt while said items are in the Society’s possession or in transit and agrees that the Society is not required to cover such items with insurance.

Should the legal ownership of the items change while the deposit is pending, whether by reason of death, sale, insolvency, gift, or otherwise, the new owner shall be required to establish the legal right to receive the items prior to their return by proof satisfactory to the Society.

(The full Society Collection Management Policy can be found on their website www.chelmhist.org)

Deed of Gift

For Society use only

Accession #: _____

Date: _____

Name: _____ Home #: _____

Address: _____ Cell #: _____

City: _____

State: _____ Zip Code: _____ Email: _____

Description of Object(s): _____

This Deed of Gift represents an agreement between the Chelmsford Historical Society and the Donor(s) named hereon. Any variation in the terms and conditions noted hereon must be submitted in writing to the Curator, Accession Chairperson, or other appropriate representative of the Society for approval before signing this agreement.

The Donor has received no goods or services in consideration of this gift.

I/we agree to the "Terms and Conditions for Artifact Donations" and that the artifacts being offered are my/our personal property not otherwise secured to a third party. I/we do hereby irrevocably and unconditionally give and transfer to the Society all right, title, and interests, including all copyright, trademark, and related property interests, if any and when owned by me/us, in and to the described property.

Donor(s): _____ Date: _____

This gift is in memory of: _____

For Society use only:

Accepted for the Society by: _____ Date: _____

Title: _____

Terms and Conditions for Artifact Donations

1. All donations to the Society will be outright, unconditional, and irrevocable gifts to the Chelmsford Historical Society (hereafter referred to as the Society) and will become the complete and total property of the Society at the time of the Donor's signature on the Deed of Gift.
2. Donations may be tax deductible. However, the Society will provide no appraisal of the gift. It is the responsibility of the Donor to obtain this.
3. If the Deed of Gift has not been signed by the Donor after 90 days of notification of its acceptance for the Society's collection, the artifacts listed on the Deed will become the property of the Society, according to the terms stated on this document and on the "Temporary Custody Receipt" form previously signed by the Donor, without any liability accruing to the Society or its agents or employees.
4. Because interests and objectives change and subsequent acquisitions may be in better condition or more useful for the Society's purposes, no guarantee can be made that the artifacts on the face of this agreement will always remain under ownership of the Society or in the collection designated herein. Unless specified on the Deed of Gift, artifacts deaccessioned from the Society's collection will not be returned to the original Donor but will be handled according to the current Collection Management Policy, which states, in part: *Before considering an item for deaccession, the Society's records must be reviewed to ensure that the terms of any gift, bequest, or conditional purchase would not be violated. As a courtesy, the Society will make a reasonable effort to contact the Donor or closest living relative and notify them of the deaccession intent and how this action will benefit the collection.*
5. The goal of preserving our collection, and limited gallery space, do not allow the Society to permanently exhibit any artifact.
6. The Donor freely consents and grants the Society, its assignees, licensees, and successors, the right to record his/her name, contact information, and documentary information and images relating to donated artifacts. The Donor's signature also constitutes free consent and permission to use his/her name and biography, and information and images relating to donated artifacts, including but not limited to use on the Society's website, exhibitions, promotional brochures, broadcasts, and transmissions. He/she expressly releases the Society from all claims arising out of the use of his/her name and biography, and documentary information and images relating to donated artifacts including but not limited to claims of invasion of privacy, defamation, and infringement of the right of publicity.

(The full Society Collection Management Policy can be found on their website www.chelmhist.org)

Recommendation for Deaccession

Date reviewed by Curator: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Accession: _____ Description: _____

Donor name: _____

Donor contact information:

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Reason for Deaccession (check all that apply):

- Lack of significance, relevance, or usefulness to Society research, education, or exhibition mission and goals.
- Opportunity to upgrade or reduce redundancy in a collection.
- Deterioration, damage, or alteration beyond repair/requiring excessive resources to repair.
- Proper preservation within current Society facilities and/or resources is not possible.
- Inadequate provenance documentation that reduces significant usefulness.
- Authenticity has been discredited.
- Legality of ownership is challenged after further investigation.
- Hazardous conditions that may threaten stability of the existing collection and/or health of personnel.
- Return to a previous holder is legally required.
- Legitimate reparation claim.

Justification for Deaccession: _____

Prepared by: _____ Date: _____

Society's Board decision: _____ Date: _____

Record of Final Disposition

Date reviewed by the Society's Board: _____

Object accession number: _____

Object description: _____

Donor: _____

Donor contact information:

Address: _____

City: _____ State: _____ Zip Code: _____

Phone: _____

Email: _____

Final Disposition (check all that apply):

- Exchange or transfer to another internal Society collection
- Exchange or transfer to another museum or educational institution
- Discard or destruction
- Repatriation
- Return to Donor or prior owner
- Public sale
- Other: _____

Justification for Disposition:

Prepared by: _____ Date: _____

Society's Board decision: _____ Date: _____ Deaccession #: _____

Chelmsford Historical Society grants title to the object(s) listed above to the party listed below.

Institution: _____

Staff Member: _____

Title: _____

Witness of Destruction

Deaccession Number: _____

Deaccession Date: _____

Object Accession Number: _____

Object Description: _____

The Object(s) listed above was/were destroyed on: _____

by means of: _____

Signatures below attest to the final and permanent removal of the object(s) from the Society collection and the completion of the destruction of the object(s). This action was supervised by the Society Curator, a Board Member, and an impartial witness.

Curator: _____

Board Member: _____

Witness: _____

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Loans

Date: _____

Accession #: _____

Loan #: _____

Chelmsford Historical Society, 40 Byam Road, South Chelmsford, MA 01824

Institution: _____ Date Out: _____

Name/Title: _____ Date Back: _____

Address: _____ Home #: _____

City: _____ Work #: _____

State: _____ Zip Code: _____ Email: _____

Purpose: _____

Location: _____

Transport: _____

Insurance: _____

Insurance value: _____ Value-Min: _____ Value-Max: _____

Object ID #	Name	Condition
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

I have read and accept the attached conditions of the loan:

Borrower's Signature

Date

Approved and released by:

Chelmsford Historical Society Representative

Date