



STAMFORD HISTORY CENTER

1508 HIGH RIDGE ROAD
STAMFORD, CT 06903
PHONE: 203-329-1183
E-MAIL: INFO@STAMFORDHISTORY.ORG
WEB: STAMFORDHISTORY.ORG

Thomas Zoubek, PhD
Executive Director

The Hon. David Martin
888 Washington Boulevard
Stamford, Connecticut, 06901

January 10, 2018

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Mayor Martin,

On behalf of the Stamford History Center, I am pleased to attach our budget submission for the city's 2018-2019 fiscal year. Let me also add that we were honored to have you with us for the rededication of the Hoyt-Barnum House in its new location at our main site. The House is becoming a major focus of activity for us and the city as we now can offer regular tours and events inside. Our partnership with the city on this project has been the highlight of the last two years, and we are very much looking forward to hosting you again soon, hopefully when the National Historic Site designation is restored this year.

In brief, the Center's 2017-2018 fiscal year has been a successful one. We continue investment in the main building and preparing programs to leverage the Hoyt-Barnum House. We also finally held our annual gala (delayed by the fire at the Italian Center) in September. As year on year numbers demonstrate, we are effectively holding two galas this fiscal year, and the consequent increase in revenues over the last year reflects the delay.

For 2017-2018, we anticipate only modest increases to revenue from our members – whether through our annual appeal or direct membership revenue. We are simplifying our membership offering to make it more attractive, but this will only take place later this Spring. We are also raising our spending on marketing and communication as we are increasingly challenged to provide a more modern digital platform for the museum.

As we adopt our strategy to host more visitors, the city's contribution to our funding remains crucial to cover our General and Administrative expenses. We have managed to hold our utility and maintenance costs level, though this is partly by not using the new cooling unit installed two years ago. Our staffing levels remain the same (two part-time employees). Our insurance costs will rise as we are now asked to insure the school building itself.

While most of the expense related to Hoyt-Barnum occurred in the previous fiscal year, we continue to upgrade and invest in both buildings as visitors to the Center have increased. We have developed new programs to take the history of Stamford and the Hoyt-Barnum House into Stamford Schools. These volunteer presentations are becoming increasingly popular with teachers and parents, and we anticipate this program growing. Fortunately, our volunteer roster continues to grow just enough to cover the new activities and support our regular work in the research library, photo archives, textile preservation, and the overall curation of the collection.

Marshall H. Millsap



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Operating Funds Request FY 2018-2019

Mission: The Stamford History Center, the municipal historian of Stamford, is an educational and research institution whose primary functions are to collect, preserve, conserve, interpret and exhibit materials relating to Stamford's rich history. We are actively engaged in encouraging the citizens of Stamford to tell their own stories and cherish the stories told by others who built our city.

Vision: The Center preserves regional history, with objects, artifacts, and documents, and provides opportunities for the community to understand and experience the past through exhibits and programs. We preserve and offer tours of the Hoyt-Barnum House, build in 1699. As the city's History Center, we have a responsibility to all citizens of our community to preserve the unique and varied experiences reflected in Stamford's story.

Program Summary: We serve all who are interested in the history of the Greater Stamford area, as well as those interested in history in general. We regularly help those interested in genealogy, as well as residents who are researching the history of their houses and neighborhoods. Our services and programs are utilized by current, past, and future residents as well as historians around the country. For example, we work with the Connecticut Ancestry Society to facilitate genealogical workshops and round tables. The History Center also serves as the base for the Civil War Roundtable of Fairfield County. Our resources, (library, website, phot archives, and other collections) are used by diverse groups including journalists, historians, playwrights, realtors and those interested in researching real estate, such as the North Street Cemetery restoration group. Individuals of all ages are drawn to our exhibits and programs.

Among our current offerings are our Victorian Tea lectures, the Founders' Day Lecture, tours of the Hoyt-Barnum House, and Cozy Sunday programs which highlight our collections and unique aspects of Stamford's history. We prepare a special exhibit each year in our first-floor public ally accessible galleries (this year on the history of firefighting in Stamford) in addition to an annual Gala which connects thematically to the exhibit. We also support satellite exhibits, tours, and lectures, as well as historic films and publications. We work closely with the Ferguson Library and regularly discuss how important city historic documents are preserved. We also work with neighborhood associations to raise local consciousness of our history, as we did recently in supporting several harbor tours for Shippan.

We have also begun a program last year to bring Stamford's history to the schools. Currently, this involves a special large ground map of Stamford and a presentation in the classrooms by one of our volunteers. These sessions are increasingly popular with teachers and parents. In the future, we hope to provide tours of the Hoyt-Barnum House as a regular field trip for local students to encourage their understanding of Stamford's history and an appreciation of how history is preserved.

Capital Budget: The Center implemented a new capital budgeting policy and process last year. The Finance Committee of the Board regularly reviews requests and sources, making recommendations to the Board as necessary. Current approved spending totals around \$8000 (new work tables in the Textiles collection room, second floor LAN wiring, new signage for the front of the building, and new computers/software for managing the collection.)

THE STAMFORD HISTORICAL SOCIETY

2018 - 2019 Budget Analysis

	2016 - 2017			2017 - 2018			2018 - 2019
	Budget	Actual	FYE 2017	Budget	Actual	Projected	Budget
	FYE 6-30-17	FYE 6-30-17	B/W to Budget	FYE 6-30-18	FYTD 10-31-17	FYE 6-30-18	FYE 6-30-19
Income							
Fundraising Events	\$16,000.00	\$0.00	(\$16,000.00)	\$16,000.00	\$33,086.14	\$50,770.00	\$20,000.00
Government Funding	\$37,000.00	\$37,000.00	\$0.00	\$45,000.00	\$38,300.00	\$38,300.00	\$42,000.00
Membership Dues	\$12,500.00	\$12,570.00	\$70.00	\$13,500.00	\$2,260.00	\$13,500.00	\$14,500.00
Other Contributions, Gifts & Grants							
Annual Appeal Income	\$14,000.00	\$12,780.00	(\$1,220.00)	\$15,000.00		\$25,000.00	\$20,000.00
Contributions	\$1,500.00	\$10,146.85	\$8,646.85	\$5,000.00	\$372.24	\$10,500.00	\$8,500.00
Grants	\$11,000.00	\$11,999.00	\$999.00	\$5,000.00	\$1,000.00	\$2,000.00	\$5,000.00
Total Other Contributions, Gifts & Grants	\$26,500.00	\$34,925.85	\$8,425.85	\$25,000.00	\$1,372.24	\$37,500.00	\$33,500.00
Total Contributions, Gifts & Grants	\$92,000.00	\$84,495.85	(\$7,504.15)	\$99,500.00	\$75,018.38	\$140,070.00	\$110,000.00
Other Revenue							
Facility Rental	\$850.00	\$795.00	(\$55.00)	\$600.00	\$535.00	\$600.00	\$650.00
Sales	\$4,400.00	\$4,410.85	\$10.85	\$4,350.00	\$639.75	\$4,850.00	\$4,350.00
Total Other Revenue	\$5,250.00	\$5,205.85	(\$44.15)	\$4,950.00	\$1,174.75	\$5,450.00	\$5,000.00
Program Service Revenue							
Events	\$1,950.00	\$3,028.85	\$1,078.85	\$3,250.00	\$0.00	\$2,750.00	\$2,600.00
Education Program				\$5,000.00		\$1,000.00	\$1,000.00
Exhibits and Library	\$1,250.00	\$2,910.55	\$1,660.55	\$2,100.00	\$984.00	\$2,204.00	\$2,400.00
Hoyt Barnum House				\$1,000.00	\$445.00	\$1,000.00	\$1,000.00
Total Program Service Revenue	\$3,200.00	\$5,939.40	\$2,739.40	\$11,350.00	\$1,429.00	\$6,954.00	\$7,000.00
Total Income	\$100,450.00	\$95,641.10	(\$4,808.90)	\$115,800.00	\$77,622.13	\$152,474.00	\$122,000.00
Expenses							
Collection & Exhibit Expenses							
Collections and Library	\$4,000.00	\$2,698.86	(\$1,301.14)	\$3,000.00	\$1,151.45	\$2,500.00	\$2,500.00
Dues and Subscriptions	\$500.00	\$780.00	\$280.00	\$500.00	\$125.00	\$500.00	\$500.00
Exhibit Costs	\$800.00	\$194.29	(\$605.71)	\$1,000.00		\$300.00	\$300.00
Hoyt-Barnum House	\$12,150.00	\$8,052.37	(\$4,097.63)	\$3,350.00	\$924.29	\$2,500.00	\$3,250.00
Library		\$641.92	\$641.92		\$524.46	\$1,000.00	\$1,000.00
Program Expense	\$500.00	\$9,406.56	\$8,906.56	\$1,900.00	\$0.00	\$2,900.00	\$3,900.00
Total Collection & Exhibit Expenses	\$17,950.00	\$21,774.00	\$3,824.00	\$9,750.00	\$2,725.20	\$8,700.00	\$10,450.00
Event Expenses	\$450.00	\$886.44	\$436.44	\$500.00	\$491.86	\$900.00	\$650.00
Fundraising Expenses	\$7,100.00	\$1,190.39	(\$5,909.61)	\$7,400.00	\$16,609.43	\$35,900.00	\$17,400.00
General & Administrative Expenses							
Board Meeting	\$650.00	\$330.00	(\$320.00)	\$500.00		\$500.00	\$500.00
Insurance	\$14,500.00	\$9,891.08	(\$4,608.92)	\$20,001.00	\$5,907.90	\$15,580.00	\$20,880.00
Office Expenses	\$6,050.00	\$4,427.33	(\$1,622.67)	\$5,250.00	\$1,631.20	\$5,250.00	\$4,550.00
Printing & Publishing		\$19.14	\$19.14		\$101.50	\$200.00	\$200.00
Processing Fees	\$800.00	\$571.43	(\$228.57)	\$900.00	\$114.90	\$615.00	\$450.00
Professional Services	\$1,400.00	\$2,169.05	\$769.05	\$1,500.00	\$0.00	\$2,600.00	\$2,600.00
Total General & Administrative Expenses	\$23,400.00	\$17,408.03	(\$5,991.97)	\$28,151.00	\$7,755.50	\$24,745.00	\$29,180.00
Occupancy Costs	\$30,100.00	\$24,487.94	(\$5,612.06)	\$31,550.00	\$5,280.26	\$28,050.00	\$28,050.00
Payroll Expenses	\$46,000.00	\$43,538.82	(\$2,461.18)	\$48,000.00	\$14,455.62	\$45,000.00	\$45,000.00
Total Expenses	\$125,000.00	\$109,285.62	(\$15,714.38)	\$125,351.00	\$47,317.87	\$143,295.00	\$130,730.00
Net Operating Income	(\$24,550.00)	(\$13,644.52)	\$10,905.48	(\$9,551.00)	\$30,304.26	\$9,179.00	(\$8,730.00)
Other Income							
Investment Income-Unrestricted	\$15,000.00	\$7,468.81	(\$7,531.19)	\$15,000.00	\$6,661.41	\$15,000.00	\$15,000.00
Investment Income-Restricted	\$5,000.00	\$2,267.51	(\$2,732.49)	\$5,000.00	\$1,951.38	\$5,000.00	\$5,000.00
Total Investment Income	\$20,000.00	\$9,736.32	(\$10,263.68)	\$20,000.00	\$8,612.79	\$20,000.00	\$20,000.00
Total Other Income	\$20,000.00	\$9,736.32	(\$10,263.68)	\$20,000.00	\$8,612.79	\$20,000.00	\$20,000.00
Net Income	(\$4,550.00)	(\$3,908.20)	\$641.80	\$10,449.00	\$38,917.05	\$29,179.00	\$11,270.00