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Thomas Zoubek, PhD
Executive Director

January 8, 2025

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City of Stamford
888 Washington Boulevard
Stamford, Connecticut, 06901

Mayor Simmons,

On behalf of the Stamford Historical Society, Inc. d/b/a Stamford History Center, I am pleased to attach our budget submission for the city's 2025-2026 fiscal year.

The Center's 2024-2025 fiscal year is projected to end with an operating loss of approximately \$10,000. This loss is due to not having a Fundraising Gala this year and lower Grant Income.

In the coming fiscal year (2025-2026), we project break-even operations with city funding increased to \$50,000. We expect to again hold a Fundraiser which will improve our results from this year.

The History Center has resumed providing educational programming to the elementary grade levels free of charge, and we have expanded our audience now reaching grades K-7 and over 2000 students. These programs have been designed in conjunction with classroom teachers, the SPS Department of Teaching and Learning and the Center's Educational Coordinator. We have obtained partial funding from a grant First County Bank Foundation. We continue to seek additional grants to fully fund the program.

In addition, the Center has opened our latest exhibit this fall documenting the life Stamford's movers and shakers during the Gilded Age. This exhibit features not only a history of Stamford's first large industrial developments, but also the domestic side of the lives of those captains of industry. We continue to address research needs in person in both our library and photo archive.

We strongly believe that the Center provides a significant resource to the city, its students and citizens. We are requesting an increase in City Funding to \$50,000 this year. Please consider our request and advise if we can provide any additional information to assist in your analysis. Thank you.

Sincerely,

Thomas Zoubek
Executive Director

Operating Funds Request FY 2025-2026

Mission Statement and Program Description

Goals and Purpose

Stamford History Center: A Resource for All of Stamford's Citizens

The Stamford Historical Society, Inc. d/b/a 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, Connecticut and our region in order to engage all citizens in the telling of their stories.

The Stamford History Center ("SHC") seeks to serve all of the people of the Greater Stamford area through our educational programming, on-site events, exhibits and by making our resources as available as possible.

Educational Programming

SHC supports educational programming by offering a variety of educational programs to the Stamford Public Schools at no charge. These programs, designed in conjunction with the SPS Department of Teaching and Learning and with input from classroom teachers, are linked to the school curriculum. They cover topics from one's understanding of the local community, the indigenous occupation of Stamford, the Colonial Period of Stamford and the ongoing history of immigration. The programs are especially targeted for the elementary school grades although last year a program was adapted to serve 7th graders. The Center was awarded a number of grants in prior years enabling us to hire a part-time Educational Coordinator to oversee and administer these programs. The grants received are well below the costs of the program and we are relying on donations and other revenues to supplement our funding. We intend to continue the program and will continue to seek out additional grants.

To provide a few highlights on this effort, during the prior school year 2023-2024, we offered five social studies enrichment programs to elementary students, based on grade level and curriculum:

- We presented our curriculum to children at all the public elementary schools, two private schools and one home school cooperative, reaching a total of 2108 children; teacher evaluations for our programs were very positive
- For the school year 2024-2025, we have continued to offer five social studies enrichment programs to address specific curricula (refining "Stamford's First

People" about Stamford's Native American tribes; and "Our City of Immigrants" about the labor and industries that fueled the city's growth for different grade levels)

- At this writing we have/are scheduled to present programs at 10 of the 13 public elementary schools, many with multiple programs, and are on track to serve an estimated 2000+ children this year. This spring we expect several hundred students to tour our Hoyt Barnum House
- We are continuing to devise new programs for grade levels that are currently not served by our existing ones

On Site Events

SHC offers a number of events to the public during the course of each year. These include our "Haunted Stamford" program in October at the Hoyt-Barnum House, our annual Victorian Tea, the reading of the Declaration of Independence on the 4th of July and our spring Cozy Sunday talks and workshops. In addition, we have programs around our exhibit openings. SHC mounts an annual exhibit dealing with a different facet of Stamford's History as well as mini-exhibits in our Halliday Gallery or Halls. We are planning musical events as another means by which we can interact with the community and provide interesting and engaging events.

Resource Accessibility

SHC has gone to great lengths to make our resources available to the public in an effort to enhance the quality of life for Stamford residents. While our budget precludes our being open more than 3 days a week, all of our library materials have been linked to the catalog of the Ferguson Library. Anyone visiting our library will be helped in their research by one of our library aides at no charge. SHC volunteers help people doing genealogical research as well as those investigating the history of their homes. We also often help realtors with property histories. We also served all independent researchers and scholars who come to use our library. Our photo archives collection is also a mine of data and volunteers help patrons regularly with finding images. Community members frequently also use our photo archives for a variety of different projects.

Exhibits

SHC mounts one major exhibit in house annually, and we also at times have a secondary minor exhibit. Our current exhibit: *How the Upper Crust Lived: The Gilded Age in Stamford 1865-1905*. The exhibit includes loaned artifacts from individuals, objects from the museum collections, and photos drawn from our photo archives. In the past, SHC has mounted exhibits on Entertainment in the City, the history of WWII veterans of Stamford, Sports in Stamford, The Fabric of Stamford and Women in the Home and Community, and the histories of the Police and Fire Departments. SHC has also mounted off-site exhibits at the Ancient Order of Hibernians Hall, the Italian Center, the Palace Theater, the Ferguson Library and the Government Center. We have also helped other organizations mount exhibits using objects loaned from our collections. In addition, we have repurposed areas within our building and now have permanent exhibits of

portraits in our library annex, landscape paintings in or library and a special exhibit of the painting of Stamford artist Delos Palmer in our lobby area.

The Stamford History Center is just that, a Center for research by all from elementary school children working on a class project to long time Stamford residents researching their own pasts. SHC centers the community by preserving its past and engaging all citizens in the process of recording its history.

Fiscal Year 2023/2024 Operating Results

- Revenue increased by 25% primarily due to our first Fundraising Gala since 2019. Tag Sale revenue was higher as was Contributions but Grant Income was down as public funding sources decreased.
- Expenses were 30% higher than the previous year due to spending on conservation of major documents and artifacts in our collection. The costs were partially offset by grants. The expenses of the Gala also increased expenses.
- We recorded a small operating loss for the year compared with a small profit in the prior year.
- We originally budgeted an Operating Loss of \$17,000 for the past year. Information Technology spending has been deferred until we can raise funds to support the spending.

Fiscal Year 2024/2025 Operating Budget and Forecast

- We are now projecting total revenue for the year 27% below last year. We do not expect to have a Fundraising Gala this year. Grant Income will be lower again and Tag Sales are also expected to come in lower. Last year's tag sales exceeded expectations. Contributions are higher so far and are expected to exceed last year.
- Expenses are expected to be 22% lower than last year due to Collection Expenses returning to normal after the conservation work done last year. There will also be no Gala Expense.
- We expect an Operating Loss of \$10,000 for the year which is \$7500 worse than the prior year.

2025/2026 Proposed Operating Budget

- The 2025-2026 Budget is roughly in line with our expected 2024-2025 results except for the addition of a Fundraising Gala.
- Revenue and Expense Budgets are higher essentially due to the addition of a Gala. Contribution Revenue is also projected to be lower due to a significant one-time item in the current year's results.
- The projection results in a small Operating Profit for the year.

THE STAMFORD HISTORICAL SOCIETY							
2025 - 2026 Budget Analysis							
	2023-2024			2024-2025			2025-2026
	Budget	Actual	Variance	Budget	Actual	Projected	Budget
	6/30/24	6/30/24	6/30/24	6/30/25	11/30/25	6/30/25	6/30/26
Income							
Contributions, Gifts & Grants							
Fundraising Events							
Total Gala	\$35,000.00	\$28,797.12	(\$6,202.88)	\$35,000.00		\$0.00	\$35,000.00
Tag Sales	\$16,000.00	\$29,799.62	\$13,799.62	\$20,000.00	\$10,359.80	\$20,000.00	\$20,000.00
Fundraising Events	\$51,000.00	\$58,596.74	\$7,596.74	\$55,000.00	\$10,359.80	\$20,000.00	\$55,000.00
Government Funding	\$47,500.00	\$47,500.00	\$0.00	\$50,000.00	\$48,925.00	\$48,925.00	\$50,000.00
Membership Dues	\$17,500.00	\$12,545.00	(\$4,955.00)	\$16,000.00	\$2,170.00	\$14,000.00	\$16,000.00
Other Contributions, Gifts & Grants							
Annual Appeal Income	\$7,500.00	\$7,066.00	(\$434.00)	\$7,500.00	\$100.00	\$8,500.00	\$9,000.00
Contributions	\$7,000.00	\$6,405.00	(\$595.00)	\$7,000.00	\$11,342.00	\$15,000.00	\$7,000.00
Grants	\$25,000.00	\$16,985.86	(\$8,014.14)	\$15,000.00		\$2,000.00	\$2,000.00
Total Other Contributions, Gifts & Grants	\$39,500.00	\$30,456.86	(\$9,043.14)	\$29,500.00	\$11,442.00	\$25,500.00	\$18,000.00
Total Contributions, Gifts & Grants	\$155,500.00	\$149,098.60	(\$6,401.40)	\$150,500.00	\$72,896.80	\$108,425.00	\$139,000.00
Other Revenue							
Facility Rental	\$500.00		(\$500.00)	\$500.00	\$0.00	\$500.00	\$500.00
Sales	\$400.00	\$138.25	(\$261.75)	\$400.00	\$70.00	\$200.00	\$250.00
Royalties		\$80.96	\$80.96				
Total Other Revenue	\$900.00	\$219.21	(\$680.79)	\$900.00	\$70.00	\$700.00	\$750.00
Program Service Revenue							
Events	\$800.00	\$2,490.00	\$1,690.00	\$800.00	\$0.00	\$2,000.00	\$2,000.00
Exhibits and Library	\$2,000.00	\$1,044.00	(\$956.00)	\$2,000.00	\$536.00	\$1,200.00	\$1,500.00
Hoyt Barnum House	\$600.00	\$760.00	\$160.00	\$800.00	\$215.00	\$350.00	\$550.00
Total Program Service Revenue	\$3,400.00	\$4,294.00	\$894.00	\$3,600.00	\$751.00	\$3,550.00	\$4,050.00
Total Income	\$159,800.00	\$153,611.81	(\$6,188.19)	\$155,000.00	\$73,717.80	\$112,675.00	\$143,800.00
Expenses							
Collection & Exhibit Expenses							
Collections	\$1,000.00	\$22,721.81	\$21,721.81	\$1,000.00		\$2,000.00	\$2,000.00
Dues and Subscriptions	\$700.00	\$283.00	(\$417.00)	\$500.00	\$375.00	\$500.00	\$500.00
Exhibit Opening	\$500.00	\$348.00	(\$152.00)	\$500.00	\$548.00	\$600.00	\$600.00
Hoyt-Barnum House	\$2,500.00	\$1,343.57	(\$1,156.43)	\$2,200.00	\$310.45	\$1,200.00	\$1,200.00
Library	\$800.00	\$350.23	(\$449.77)	\$800.00		\$500.00	\$500.00
Program Expense	\$7,050.00	\$1,858.77	(\$5,191.23)	\$1,500.00	\$40.71	\$1,400.00	\$2,400.00
Total Collection & Exhibit Expenses	\$12,550.00	\$26,905.38	\$14,355.38	\$6,500.00	\$1,274.16	\$6,200.00	\$7,200.00
Event Expenses	\$400.00	\$345.50	(\$54.50)	\$400.00	\$0.00	\$350.00	\$350.00
Fundraising Expenses	\$15,950.00	\$15,604.60	(\$345.40)	\$16,250.00	\$1,002.35	\$1,757.00	\$16,200.00
General & Administrative Expenses							
Amortization Expense	\$80.00	\$77.59	(\$2.41)	\$80.00		\$80.00	\$80.00
Depreciation Expense	\$4,000.00	\$393.09	(\$3,606.91)	\$2,300.00		\$400.00	\$400.00
Information Technology	\$3,000.00		(\$3,000.00)	\$3,000.00	\$0.00	\$0.00	
Insurance	\$16,000.00	\$15,363.16	(\$636.84)	\$17,000.00	\$5,253.00	\$15,610.00	\$16,110.00
Marketing Expense	\$4,000.00		(\$4,000.00)	\$3,000.00		\$2,000.00	\$2,000.00
Office Expenses	\$6,500.00	\$8,459.79	\$1,959.79	\$7,000.00	\$2,626.64	\$6,750.00	\$6,750.00
Printing & Publishing	\$350.00	\$620.00	\$270.00	\$750.00	\$290.00	\$750.00	\$750.00
Processing Fees	\$600.00	\$854.89	\$254.89	\$600.00	\$54.64	\$350.00	\$500.00
Professional Services	\$1,950.00	\$1,950.00	\$0.00	\$1,950.00	\$50.00	\$2,550.00	\$3,050.00
Total General & Administrative Expenses	\$36,680.00	\$27,718.52	(\$8,961.48)	\$35,680.00	\$8,274.28	\$28,490.00	\$29,640.00
Occupancy Costs							
Electricity 1508 High Ridge	\$13,000.00	\$9,570.44	(\$3,429.56)	\$13,500.00	\$2,909.43	\$10,000.00	\$11,000.00
Grounds Upkeep	\$1,600.00	\$1,650.00	\$50.00	\$1,600.00	\$1,060.00	\$1,600.00	\$1,600.00
Heating Oil 1508 High Ridge	\$18,000.00	\$18,714.31	\$714.31	\$20,000.00	\$2,809.28	\$17,000.00	\$18,000.00
Phone and Internet 1508 High Ridge	\$3,000.00	\$3,301.51	\$301.51	\$3,000.00	\$1,346.10	\$3,300.00	\$3,300.00
Repair & Maintenance 1508 High Ridge	\$5,000.00	\$906.81	(\$4,093.19)	\$5,000.00		\$1,500.00	\$1,500.00
Security	\$300.00		(\$300.00)	\$0.00			
Water 1508 High Ridge	\$250.00	\$287.83	\$37.83	\$300.00	\$139.65	\$300.00	\$300.00
Total Occupancy Costs	\$41,150.00	\$34,430.90	(\$6,719.10)	\$43,400.00	\$8,264.46	\$33,700.00	\$35,700.00
Payroll Expenses	\$70,000.00	\$52,040.49	(\$17,959.51)	\$52,000.00	\$19,598.59	\$52,187.00	\$53,000.00
Total Expenses	\$176,730.00	\$157,045.39	(\$19,684.61)	\$154,230.00	\$38,413.84	\$122,684.00	\$142,090.00
Net Operating Income	(\$16,930.00)	(\$3,433.58)	\$13,496.42	\$770.00	\$35,303.96	(\$10,009.00)	\$1,710.00