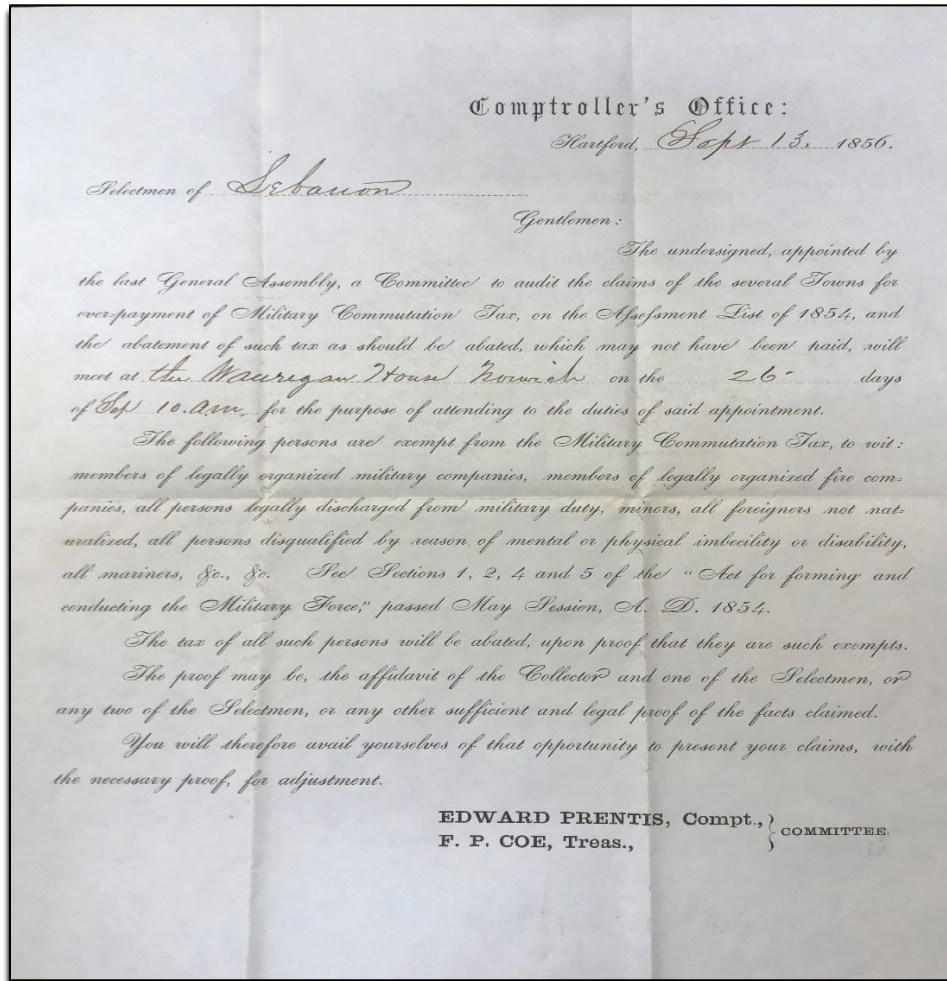


# HISTORIC DOCUMENTS PRESERVATION PROGRAM

PRESERVING THE PAST, PROTECTING THE FUTURE

Annual Report on the  
Historic Documents Preservation Grant Program

**FY 2022**



Connecticut State Library  
Hartford, Connecticut  
January 1, 2023

# CONNECTICUT STATE LIBRARY

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Deborah Schander

## PUBLIC RECORDS ADMINISTRATOR

LeAnn Power, CRM

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## FRONT COVER

*Military Commutation Tax Exemption Audit Notice*. RG 062:071 Lebanon Town Records, Court-Election Records, 1775-1928. Box 8, folder 5, Military Records.

*Issued in accordance with Conn. Gen. Stat. §11-8m(b)*

**Annual Report to the  
Joint Standing Committee on Government Administration  
on the Historic Documents Preservation Grant Program**

**I. Historic Documents Preservation Program**

The Historic Documents Preservation Program supports the preservation and management of local government records throughout Connecticut. The program was established under Public Act No. 00-146, *An Act Concerning Real Estate Filings and the Preservation of Historic Documents* and is codified in *Connecticut General Statutes (CGS) §11-8i through §11-8n*, effective July 1, 2000.

Seventy per cent of the account is allocated for municipal grant awards “to enhance or improve the preservation and management of historic documents,” pursuant to CGS §11-8l(d). As required under CGS §11-8m(b), this annual report describes the municipal grant awards and provides a summary of the State Library’s activities and recommendations concerning the grant program.

Thirty per cent of the program account is allocated for “(1) the preservation and management of historic documents maintained by the State Library, and (2) the expenses of administering the historic documents preservation grant program,” pursuant to CGS §11-8k(c). As required under CGS §11-8k(c), a separate annual report is submitted each year to describe the activities carried out by the State Library with these allocated funds.

**II. Municipal Grant Awards**

The primary intent of the program is to provide financial assistance to Connecticut’s 169 towns and cities to improve the preservation and management of public records. The grant program allows funds to be pooled and distributed, ensuring that every municipality has the resources to carry out a significant records project each year.

The program provides a targeted grant to every municipality that applies for an eligible project. The program also offers records disaster recovery grants dependent upon the availability of funds at the time of application.

The targeted grant program funds a wide variety of eligible projects. The Office of the Public Records Administrator has identified needs and expanded the types of projects eligible for funding beyond the early emphasis on preservation and conservation of land

records. The program currently funds projects in the areas of Preservation and Conservation, Organization and Indexing, Storage and Facilities, Inventory and Planning, and Program Development.

In FY 2022, the State Library awarded targeted grants to 151 municipalities totaling \$949,500, comprised of 114 Cycle 1 awards totaling \$727,000 and 37 Cycle 2 awards totaling \$222,500.

Targeted grants were awarded in the amounts of \$5,500 for small towns (population less than 20,000); \$7,500 for medium towns (population between 20,000 and 69,999); and \$10,500 for large towns (population of 70,000 or more).

With these grants, municipalities have completed many valuable records projects, including preserving early town records; scanning records to improve public access; microfilming records to ensure long term security; purchasing records storage equipment, software and hardware; and improving the organization and management of their public records.

**A. Cycle 1 Targeted Grant Awards**

<b>Municipality</b>	<b>Category</b>	<b>Amount</b>
Ansonia	Preservation/Conservation	\$5,500.00
Ashford	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Beacon Falls	Organization and Indexing	\$5,500.00
Berlin	Organization and Indexing	\$5,500.00
Bethany	Organization and Indexing	\$5,500.00
Bethel	Preservation/Conservation	\$5,500.00
	Organization and Indexing	
Bethlehem	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Bloomfield	Preservation/Conservation	\$7,500.00
	Organization and Indexing	
Bolton	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Branford	Preservation/Conservation	\$7,500.00
Burlington	Organization and Indexing	\$5,500.00
Canaan	Organization and Indexing	\$5,500.00
Canterbury	Organization and Indexing	\$5,500.00
Canton	Preservation/Conservation	\$5,500.00
	Storage and Facilities	
Cheshire	Organization and Indexing	\$7,500.00
Clinton	Organization and Indexing	\$5,500.00

Colchester	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Colebrook	Organization and Indexing	\$5,500.00
Columbia	Preservation/Conservation	\$5,500.00
	Organization and Indexing	
Cornwall	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Cromwell	Preservation/Conservation	\$5,500.00
Deep River	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Derby	Organization and Indexing	\$5,500.00
East Granby	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
East Hampton	Storage and Facilities	\$5,500.00
	Organization and Indexing	
East Hartford	Organization and Indexing	\$7,500.00
East Haven	Organization and Indexing	\$7,500.00
	Preservation/Conservation	
East Lyme	Organization and Indexing	\$5,500.00
Easton	Storage and Facilities	\$5,500.00
Enfield	Organization and Indexing	\$7,500.00
Fairfield	Organization and Indexing	\$7,500.00
Farmington	Program Development	\$7,500.00
Glastonbury	Preservation/Conservation	\$7,500.00
	Organization and Indexing	
Goshen	Storage and Facilities	\$5,500.00
Greenwich	Organization and Indexing	\$7,500.00
Griswold	Organization and Indexing	\$5,500.00
Guilford	Preservation/Conservation	\$7,500.00
Haddam	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Hartford	Organization and Indexing	\$10,500.00
Killingly	Organization and Indexing	\$5,500.00
Killingworth	Storage and Facilities	\$5,500.00
Lebanon	Organization and Indexing	\$5,500.00
Ledyard	Storage and Facilities	\$5,500.00
Lisbon	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Litchfield	Preservation/Conservation	\$5,500.00
	Storage and Facilities	
Lyme	Organization and Indexing	\$5,500.00
Madison	Organization and Indexing	\$5,500.00
Manchester	Preservation/Conservation	\$7,500.00
Mansfield	Organization and Indexing	\$7,500.00
Marlborough	Organization and Indexing	\$5,500.00

Meriden	Preservation/Conservation	\$7,500.00
Middlebury	Preservation/Conservation	\$5,500.00
Milford	Preservation/Conservation	\$7,500.00
	Organization and Indexing	
Montville	Storage and Facilities	\$5,500.00
Morris	Organization and Indexing	\$5,500.00
New Britain	Organization and Indexing	\$10,500.00
New Fairfield	Organization and Indexing	\$5,500.00
New Hartford	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
New Haven	Organization and Indexing	\$10,500.00
Newington	Preservation/Conservation	\$7,500.00
Newtown	Organization and Indexing	\$7,500.00
Norfolk	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
North Branford	Organization and Indexing	\$5,500.00
North Canaan	Preservation/Conservation	\$5,500.00
North Haven	Organization and Indexing	\$7,500.00
	Preservation/Conservation	
North Stonington	Preservation/Conservation	\$5,500.00
Norwalk	Organization and Indexing	\$10,500.00
Norwich	Organization and Indexing	\$7,500.00
Old Lyme	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Old Saybrook	Program Development	\$5,500.00
Orange	Organization and Indexing	\$5,500.00
Plainfield	Organization and Indexing	\$5,500.00
Plainville	Preservation/Conservation	\$5,500.00
Portland	Storage and Facilities	\$5,500.00
Preston	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Putnam	Storage and Facilities	\$5,500.00
Redding	Organization and Indexing	\$5,500.00
Ridgefield	Organization and Indexing	\$7,500.00
Rocky Hill	Preservation/Conservation	\$7,500.00
Salem	Organization and Indexing	\$5,500.00
Salisbury	Organization and Indexing	\$5,500.00
Scotland	Organization and Indexing	\$5,500.00
Seymour	Organization and Indexing	\$5,500.00
Sharon	Organization and Indexing	\$5,500.00
Shelton	Organization and Indexing	\$7,500.00
Sherman	Organization and Indexing	\$5,500.00
Simsbury	Organization and Indexing	\$7,500.00
South Windsor	Preservation/Conservation	\$7,500.00
Southington	Organization and Indexing	\$7,500.00

Stamford	Preservation/Conservation Organization and Indexing	\$10,500.00
Stonington	Preservation/Conservation	\$5,500.00
Stratford	Organization and Indexing	\$7,500.00
Thompson	Organization and Indexing Preservation/Conservation	\$5,500.00
Tolland	Preservation/Conservation	\$5,500.00
Torrington	Preservation/Conservation Organization and Indexing Storage and Facilities	\$7,500.00
Union	Organization and Indexing Storage and Facilities	\$5,500.00
Vernon	Organization and Indexing Preservation/Conservation	\$7,500.00
Voluntown	Organization and Indexing	\$5,500.00
Wallingford	Organization and Indexing	\$7,500.00
Warren	Organization and Indexing	\$5,500.00
Washington	Organization and Indexing	\$5,500.00
Waterbury	Organization and Indexing Preservation/Conservation	\$10,500.00
Waterford	Preservation/Conservation Organization and Indexing	\$5,500.00
Watertown	Preservation/Conservation	\$7,500.00
West Hartford	Organization and Indexing Preservation/Conservation	\$7,500.00
West Haven	Organization and Indexing	\$7,500.00
Weston	Preservation/Conservation	\$5,500.00
Wethersfield	Preservation/Conservation Program Development Organization and Indexing	\$7,500.00
Wilton	Preservation/Conservation Organization and Indexing	\$5,500.00
Winchester	Organization and Indexing	\$5,500.00
Windham	Organization and Indexing	\$7,500.00
Windsor	Preservation/Conservation	\$7,500.00
Wolcott	Organization and Indexing Preservation/Conservation	\$5,500.00
Woodbridge	Organization and Indexing	\$5,500.00
<b>CYCLE 1 TOTAL</b>		<b>\$727,000.00</b>

## B. Cycle 2 Targeted Grant Awards

Municipality	Category	Amount
Andover	Organization and Indexing	\$5,500.00
Bridgeport	Organization and Indexing	\$10,500.00
	Preservation/Conservation	
Bristol	Preservation/Conservation	\$7,500.00
Brookfield	Organization and Indexing	\$5,500.00
Brooklyn	Organization and Indexing	\$5,500.00
Chaplin	Organization and Indexing	\$5,500.00
Coventry	Preservation/Conservation	\$5,500.00
Darien	Organization and Indexing	\$7,500.00
	Preservation/Conservation	
Durham	Storage and Facilities	\$5,500.00
East Haddam	Organization and Indexing	\$5,500.00
East Windsor	Organization and Indexing	\$5,500.00
Eastford	Organization and Indexing	\$5,500.00
Essex	Preservation/Conservation	\$5,500.00
Granby	Storage and Facilities	\$5,500.00
Groton	Storage and Facilities	\$7,500.00
	Organization and Indexing	
Hampton	Organization and Indexing	\$5,500.00
Hartland	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Harwinton	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Hebron	Organization and Indexing	\$5,500.00
Kent	Organization and Indexing	\$5,500.00
Monroe	Organization and Indexing	\$5,500.00
Naugatuck	Preservation/Conservation	\$7,500.00
New London	Preservation/Conservation	\$7,500.00
New Milford	Storage and Facilities	\$7,500.00
	Preservation/Conservation	
Oxford	Storage and Facilities	\$5,500.00
Pomfret	Storage and Facilities	\$5,500.00
	Organization and Indexing	
Somers	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Southbury	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
Sprague	Organization and Indexing	\$5,500.00
Stafford	Storage and Facilities	\$5,500.00
Sterling	Storage and Facilities	\$5,500.00
Suffield	Preservation/Conservation	\$5,500.00
Thomaston	Organization and Indexing	\$5,500.00



Westbrook	Organization and Indexing	\$5,500.00
Westport	Organization and Indexing	\$7,500.00
Willington	Organization and Indexing	\$5,500.00
	Preservation/Conservation	
Woodbury	Storage and Facilities	\$5,500.00
	Preservation/Conservation	
<b>CYCLE 2 TOTAL</b>		<b>\$222,500.00</b>

### III. Grant Program Administration

The program is administered through the Office of the Public Records Administrator. Staff of the State Library and the Historic Document Advisory Committee would like to acknowledge the services of Kathy Makover, Field Archivist. Kathy retired in 2022 after 13 years of administering the grant program. Her detail-oriented work in all aspects of grant administration resulted in improved efficiency and transparency.

LeAnn Power, Public Records Administrator, is currently administering the grant program. The State Library received approval to refill the position in FY2023.

State Library staff generally meet three times each year with the program’s Advisory Committee, which includes town clerks representing small, medium and large municipalities and all geographic regions of the state.

Grant funding levels are determined each year by the State Librarian in consultation with the Fiscal Administrative Officer based on mid-year evaluation of revenue and expenditure projections. Based on this evaluation, grant award levels for FY 2022 were set at the same levels as established for the prior grant year.

FY 2022 grant award levels therefore remained set at \$5,500 for small towns, \$7,500 for medium towns, and \$10,500 for large towns.

Disaster recovery grants are available for an amount up to \$10,000, subject to the availability of funds, with a provision for approval of an amount over \$10,000 should circumstances warrant.

The following individuals served as members of the Advisory Committee for the Historic Documents Preservation Program during FY 2022:

- Lisa Arpin, Town Clerk, Branford
- Vera Dinneen, Cornwall Town Clerk
- Heather George, Town Clerk, Sterling

Doralis Hernaiz, Fiscal Administrative Officer, State Library  
Richard McQuaid, Town Clerk, Norwalk  
Therese Pac, Town Clerk, Bristol  
Lizette Pelletier, State Archivist, State Library  
Anna Posniak, Town Clerk, Windsor  
LeAnn Power, Public Records Administrator, Connecticut State Library  
Patricia Riley, Town Clerk, Ledyard  
Deborah Schander, State Librarian, State Library  
Antoinette Spinelli, Town Clerk, Waterbury  
Sharon Uricchio, Town Clerk, Clinton  
Kate Wall, Town Clerk, Berlin  
Elizabeth Waters, Town Clerk, Bolton  
Sandi Wieleba, Town Clerk, Rocky Hill

For FY 2022, Allen Ramsey, Assistant State Archivist, served as recorder.

#### **IV. Locally Funded Projects**

A portion of the program's land recording fee is retained directly by the town clerk office in each town and used for the preservation and management of historic documents, pursuant to CGS §7-34a(d). The available funding varies significantly from town to town based on the market activity and the volume of land recordings within each town.

Town clerks use these funds for a variety of records preservation and management projects as well as related staff training and continuing education. These local funds allow clerks to address both immediate and long-term records management needs when budgetary constraints might otherwise limit these important and ongoing efforts.

#### **V. Findings and Recommendations**

As described in Section I, the Historic Documents Preservation Program is funded through a fee collected on municipal land recordings. There have been several changes to the program's fee structure over the years. As originally established FY 2001, municipalities collected a \$3 recording fee for records preservation and management, retaining \$1 for the local town clerk fund and remitting \$2 for deposit to the program account.

Effective July 15, 2013, pursuant to Public Act No. 13-184, a new distribution model was set for the land recording fee on Documents with Nominees, excluding this fee from distribution to the program account and significantly reducing program revenues. In the 2014 and 2015 legislative sessions, the State Library requested that the program's portion of the recording fee on Documents with Nominees be credited to the account to keep the fund whole but the proposals did not move forward.

During the 2017 session, however, the legislature approved a significant increase in funding for the program, doubling the land recording fee that generates revenues for the account. Effective December 1, 2017, pursuant to Public Act No. 17-2, municipalities began collecting a \$6 fee for records preservation and management and an additional \$4 fee for deposit to the state's General Fund. From the \$6 fee, municipalities retain \$2 for the local town clerk fund and remit \$4 for deposit to the program account.

As the program fee is tied to land recording volumes, program revenues are also impacted by changes in the real estate market. In FY 2022, revenues increased by 6% as compared to the prior year likely reflecting higher volumes in both home sales and refinancing.

At the same time, the proportion of Document with Nominee recordings increased during this time period due to greater utilization of the Mortgage Electronic Registration System (MERS). As described by MERSCORP Holdings, MERS is a "national electronic database that tracks changes in mortgage servicing rights and beneficial ownership interests in loans secured by residential real estate" and it serves as a nominee. As noted above, fees for these documents are no longer credited to the program account.

The State Library maintains a fiscally conservative approach in its management of the account. During this period, the State Library awarded the FY 2022 municipal grants; accessioned and preserved archival records; supported the publication of the *Public Records of the State of Connecticut* and other significant records projects; provided records training and outreach; and supported professional development in archives and records management.

Since its establishment, the Historic Documents Preservation Program has distributed over \$19 million in grants to municipalities. These grants support towns in preserving public records while also increasing efficiencies; reducing costs; and improving public services, including electronic access to land records and other public records.

Funding to support these services has proven even more critical during the COVID-19 pandemic. Many municipalities have reported that because of ongoing grants from this program, they were well-prepared to provide electronic access to the land records and maps when town halls were closed to the public. This ability to provide online access helped ensure that towns could continue to maintain one of their essential services, the legal recording of property transactions across the state. Without these grants, many towns would have been unprepared to provide sufficient online access.

The preservation and management of public records is an essential function of municipal government. Records such as land recordings, maps, minutes and vital records, serve to protect and document the rights and interests of individuals and entities throughout the state. The Historic Documents Preservation Program continues to provide significant benefits to the citizens of Connecticut by providing outreach, support and funding for municipal records management and preservation programs.

**VI. Financial Statement: Historic Documents Preservation Account – FY 2022**

<b>Beginning Balance as of July 1, 2021</b>	1,502,403	
	<b>Revenue</b>	
	1,747,526	
	<b>Interest earned</b>	
	1,124	
<b>Total Receipts</b>	<u><b>1,748,650</b></u>	
	<u><u><b>3,251,053</b></u></u>	
<b>Total Available Funds</b>	<u><u><b>3,251,053</b></u></u>	
	<b>Grants Awarded</b>	
	945,465	
	<b>CSL Operating Expenses</b>	
	547,581	
<b>Total Expenditures</b>	<u><u><b>1,493,046</b></u></u>	
<b>Year End Balance as of June 30, 2022</b>	<table border="1"><tr><td><b>1,758,007</b></td></tr></table>	<b>1,758,007</b>
<b>1,758,007</b>		

*Pursuant to Connecticut General Statutes §11-8l(d) and §11-8k(c), 70% of this account is reserved for municipal grant awards and 30% is reserved for administrative expenses.*