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John Thacher vs, Azariah Pritchard, 1771, Connecticut State Library, State Archives, RG 003, New Haven County, County Court, Files.

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 2024, the State Library awarded targeted grants to 150 municipalities totaling \$1,016,000, comprised of 112 Cycle 1 awards totaling \$766,000 and 38 Cycle 2 awards totaling \$250,000.

Targeted grants were awarded in the amounts of \$6,000 for small towns (population less than 20,000); \$8,000 for medium towns (population between 20,000 and 69,999); and \$11,000 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

Municipality	Category	Amount
Avon	Storage and Facilities	\$6,000
Barkhamsted	Storage and Facilities	\$6,000
Beacon Falls	Storage and Facilities	\$6,000
Bethany	Organization and Indexing	\$6,000
Bethel	Organization and Indexing	\$8,000
Bethlehem	Organization and Indexing Preservation/Conservation	\$6,000
Bloomfield	Preservation/Conservation	\$8,000
Bolton	Storage and Facilities	\$6,000
Branford	Preservation/Conservation	\$8,000
Brookfield	Organization and Indexing	\$6,000
Canterbury	Organization and Indexing Preservation/Conservation	\$6,000
Canton	Organization and Indexing Preservation/Conservation	\$6,000
Chaplin	Storage and Facilities Preservation/Conservation	\$6,000
Cheshire	Organization and Indexing	\$8,000
Colchester	Preservation/Conservation Storage and Facilities	\$6,000
Colebrook	Organization and Indexing	\$6,000

	Preservation/Conservation Storage and Facilities Organization and Indexing	
Columbia		\$6,000
Cornwall	Storage and Facilities	\$6,000
Coventry	Preservation/Conservation	\$6,000
Cromwell	Preservation/Conservation	\$6,000
Darien	Organization and Indexing	\$8,000
Deep River	Organization and Indexing	\$6,000
Derby	Organization and Indexing	\$6,000
Durham	Preservation/Conservation	\$6,000
East Granby	Preservation/Conservation Organization and Indexing	\$6,000
East Haddam	Organization and Indexing	\$6,000
East Hampton	Preservation/Conservation Organization and Indexing	\$6,000
East Hartford	Organization and Indexing	\$8,000
East Haven	Storage and Facilities Preservation/Conservation	\$8,000
East Lyme	Preservation/Conservation	\$6,000
Easton	Organization and Indexing Preservation/Conservation	\$6,000
Ellington	Storage and Facilities	\$6,000
Enfield	Storage and Facilities	\$8,000
Essex	Storage and Facilities Organization and Indexing	\$6,000
Fairfield	Organization and Indexing	\$8,000
Farmington	Program Development	\$8,000
Glastonbury	Preservation/Conservation	\$8,000
Goshen	Storage and Facilities	\$6,000
Greenwich	Organization and Indexing	\$8,000
Griswold	Organization and Indexing	\$6,000
Guilford	Preservation/Conservation	\$8,000
Haddam	Storage and Facilities Preservation/Conservation	\$6,000
Hampton	Organization and Indexing	\$6,000
Killingly	Organization and Indexing	\$6,000
Lebanon	Preservation/Conservation	\$6,000
Ledyard	Storage and Facilities Preservation/Conservation	\$6,000
Lisbon	Preservation/Conservation Organization and Indexing	\$6,000
Litchfield	Organization and Indexing	\$6,000
Lyme	Organization and Indexing	\$6,000
Madison	Organization and Indexing	\$6,000

Manchester	Preservation/Conservation	\$8,000
Mansfield	Storage and Facilities	\$8,000
Marlborough	Program Development Storage and Facilities	\$6,000
Meriden	Preservation/Conservation	\$8,000
Middlebury	Storage and Facilities Preservation/Conservation	\$6,000
Middlefield	Organization and Indexing	\$6,000
Milford	Preservation/Conservation	\$8,000
Montville	Organization and Indexing Storage and Facilities	\$6,000
Naugatuck	Organization and Indexing	\$8,000
New Britain	Preservation/Conservation	\$11,000
New Fairfield	Organization and Indexing	\$6,000
New Hartford	Preservation/Conservation	\$6,000
Newington	Preservation/Conservation	\$8,000
Newtown	Storage and Facilities Preservation/Conservation	\$8,000
North Branford	Organization and Indexing	\$6,000
North Canaan	Preservation/Conservation	\$6,000
Norwalk	Organization and Indexing	\$11,000
Norwich	Organization and Indexing	\$8,000
Old Lyme	Organization and Indexing	\$6,000
Old Saybrook	Program Development	\$6,000
Orange	Organization and Indexing	\$6,000
Plainfield	Organization and Indexing	\$6,000
Pomfret	Organization and Indexing	\$6,000
Portland	Organization and Indexing	\$6,000
Prospect	Organization and Indexing	\$6,000
Redding	Storage and Facilities	\$6,000
Ridgefield	Organization and Indexing Storage and Facilities	\$8,000
Rocky Hill	Storage and Facilities	\$8,000
Salem	Preservation/Conservation	\$6,000
Scotland	Organization and Indexing	\$6,000
Seymour	Storage and Facilities	\$6,000
Shelton	Organization and Indexing	\$8,000
Sherman	Organization and Indexing	\$6,000
Simsbury	Preservation/Conservation	\$8,000
Southington	Organization and Indexing	\$8,000
South Windsor	Preservation/Conservation	\$8,000
Stamford	Preservation/Conservation	\$11,000
Sterling	Organization and Indexing	\$6,000
Stonington	Preservation/Conservation	\$6,000

Stratford	Storage and Facilities	\$8,000
Suffield	Organization and Indexing	\$6,000
Thompson	Organization and Indexing Preservation/Conservation	\$6,000
Tolland	Preservation/Conservation	\$6,000
Torrington	Organization and Indexing	\$8,000
Vernon	Organization and Indexing	\$8,000
Voluntown	Organization and Indexing	\$6,000
Wallingford	Organization and Indexing Preservation/Conservation	\$8,000
Warren	Organization and Indexing	\$6,000
Waterbury	Organization and Indexing	\$11,000
Waterford	Preservation/Conservation Storage and Facilities	\$6,000
Watertown	Organization and Indexing	\$8,000
West Haven	Organization and Indexing	\$8,000
Weston	Preservation/Conservation	\$6,000
Westport	Organization and Indexing Storage and Facilities	\$8,000
Wethersfield	Preservation/Conservation Program Development	\$8,000
Wilton	Storage and Facilities	\$6,000
Windham	Organization and Indexing	\$8,000
Windsor	Preservation/Conservation	\$8,000
Windsor Locks	Organization and Indexing	\$6,000
Wolcott	Storage and Facilities	\$6,000
Woodbridge	Organization and Indexing	\$6,000
Woodstock	Organization and Indexing	\$6,000
Cycle 1 Total		\$766,000

B. Cycle 2 Targeted Grant Awards

Municipality	Category	Amount
Andover	Storage and Facilities	\$6,000
Ashford	Organization and Indexing Storage and Facilities	\$6,000
Berlin	Preservation/Conservation Organization and Indexing	\$8,000
Bozrah	Organization and Indexing	\$6,000
Bridgewater	Storage and Facilities	\$6,000
Brooklyn	Organization and Indexing	\$6,000

Burlington	Preservation/Conservation	\$6,000
Canaan	Storage and Facilities Preservation/Conservation	\$6,000
Chester	Preservation/Conservation	\$6,000
Clinton	Organization and Indexing	\$6,000
Danbury (city)	Storage and Facilities Preservation/Conservation	\$11,000
Eastford	Preservation/Conservation Organization and Indexing	\$6,000
East Windsor	Organization and Indexing	\$6,000
Franklin	Preservation/Conservation	\$6,000
Hamden	Storage and Facilities Organization and Indexing	\$8,000
Harwinton	Organization and Indexing	\$6,000
Hebron	Preservation/Conservation	\$6,000
Kent	Storage and Facilities Preservation/Conservation	\$6,000
Killingworth	Storage and Facilities	\$6,000
Monroe	Organization and Indexing	\$6,000
New Canaan	Organization and Indexing	\$8,000
New Haven	Organization and Indexing	\$11,000
New Milford	Storage and Facilities	\$8,000
North Haven	Storage and Facilities Preservation/Conservation	\$8,000
North Stonington	Organization and Indexing	\$6,000
Plainville	Preservation/Conservation	\$6,000
Putnam	Preservation/Conservation Organization and Indexing	\$6,000
Sharon	Storage and Facilities	\$6,000
Somers	Organization and Indexing	\$6,000
Southbury	Storage and Facilities Preservation/Conservation	\$6,000
Sprague	Organization and Indexing	\$6,000
Thomaston	Preservation/Conservation	\$6,000
Union	Storage and Facilities Preservation/Conservation	\$6,000
Westbrook	Program Development Preservation/Conservation	\$6,000
West Hartford	Preservation/Conservation	\$8,000
Willington	Storage and Facilities	\$6,000
Winchester	Storage and Facilities	\$6,000
Woodbury	Preservation/Conservation	\$6,000
Cycle 2 Total		\$250,000

III. Grant Program Administration

The program is administered through the Office of the Public Records Administrator. 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 2024 were increased by \$500 from the levels established for the prior grant year – FY 2024 grant award levels were set at \$6,000 for small towns, \$8,000 for medium towns, and \$11,000 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.

Nicole Besseghir, Public Records Analyst, administers the grant program for the State Library.

The following individuals served as members of the Advisory Committee for the Historic Documents Preservation Program during FY 2024:

Lisa Arpin, Town Clerk, Branford

Mark Bernacki, Town Clerk, New Britain

Vera Dinneen, Town Clerk, Cornwall

Heather George, Town Clerk, Sterling

Doralis Hernaiz, Fiscal Administrative Officer, State Library

Richard McQuaid, Town Clerk, Norwalk

Lizette Pelletier, State Archivist, State Library

Anna Posniak, Town Clerk, Bloomfield

LeAnn Power, Public Records Administrator, Connecticut State Library

Patricia Riley, Town Clerk, Ledyard

Deborah Schander, State Librarian, State Library

Antoinette Spinelli, Town Clerk, Waterbury

Patricia Spruance, Town Clerk, Windham

Sharon Uricchio, Town Clerk, Clinton

Kate Wall, Town Clerk, Berlin

Elizabeth Waters, Town Clerk, Bolton
Sandi Wieleba, Town Clerk, Rocky Hill

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.

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 and the program continues to be impacted by this legislative change – losing 15% over the last fiscal year and an average of 18% each year since 2013.

As the program fee is tied to land recording volumes, program revenues are also impacted by changes in the real estate market. In FY 2024, revenues decreased by 9% from the previous year; comparing the past two years, revenues declined 20%. Some factors that may have contributed to the decrease include a low housing inventory, steep home prices, high mortgage rates, and inflation.

The State Library maintains a fiscally conservative approach in its management of the account. During this period, the State Library awarded the FY 2024 municipal grants; accessioned and preserved archival records; supported the continuation of the New Haven judicial records project “Uncovering New Haven” 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 \$21 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 proved even more critical during the COVID-19 pandemic, with many municipalities reporting 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 continued to maintain one of their essential services, the legal recording of property transactions across the state. Since COVID, the grants have allowed towns to continue to expand their ability to provide electronic access to land records as well as undertake invaluable records management and preservation projects for municipal records.

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 2024

Beginning Balance as of July 1, 2023	\$ 1,743,417
Revenue	\$ 1,344,449
Interest Earned	\$ 74,023
Total Receipts	\$ 1,418,472
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Total Available Funds	\$ 3,161,889
Grants Awarded	\$ 1,016,000
CSL Operating Expenses	\$ 727,425
Total Expenditures	\$ 1,743,425
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Year End Balance as of June 30, 2024	\$ 1,418,464

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.