

Partner Agency Application for Funding ~ FY 2021

Agency Name: Spotsylvania Historical Association	
Physical Address:	9019 Old Battlefield Blvd, Spotsylvania Courthouse, VA 22553
Mailing Address/PO Box:	PO Box 64
City:	Spotsylvania
State:	VA
Zip:	22553
Telephone Number:	540-507-7278
Fax Number:	
Federal Tax ID #:	54-1265690
Web Address:	www.spotsylvaniahistory.org
General Email Address:	info@spotsylvaniahistory.org
Agency Main Contact:	Sara Dye
Title:	Director/Treasurer
Telephone Number:	540-507-7278
E-Mail Address:	info@spotsylvaniahistory.org

Agency General Information

Agency Mission

The SHA is a non-profit organization whose mission is to promote the history of Spotsylvania County in its entirety. Through exhibitions, educational programs, partnerships, and collections support, the society works to create a greater knowledge and appreciation for our County and American history in audiences of all ages. In pursuit of our mission the SHA will:

Promote public interest in the preservation of sites and buildings of historic and architectural significance and to offer encouragement to the owners for the preservation of such properties

Promote and participate in research of the cultural, historical, and scientific aspects of our heritage.

Make the past more relevant to the present generation by supporting a perpetual educational program.

Provide Collections support to the Spotsylvania County Museum for the enhancement and appreciation of our heritage.

Encourage the continuing expansion of the archival and research library collections of the Museum.

Promote and nurture an awareness of the history of Spotsylvania County and its contributions to the building of our nation.

Cooperate with other organizations in promoting these objectives.

Number of years agency has been in operation	54 years
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Localities Served	Spotsylvania County; Central Virginia
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items to be submitted with the application: *(include 1 copy of each)*

IRS 501(c)(3) Letter

Audit Report *(with Audit Management Letter)*

Current Financial statement

IRS 990

Accountant Contact Information

Organizational Chart

Current Board Roster (*with contact information*)

Agency's Current Strategic Plan

Agency Overview

Purpose/Description

The Spotsylvania Historical Association (SHA) was formed in 1964 to serve as a repository for Spotsylvania's rich history. The SHA began operation of the Spotsylvania County Museum at historic Berea Church and serve as a clearinghouse for historical and genealogical information as well as providing daily operation of a small museum.

Justification of Agency and Requested Funding

Please state clearly why this service should be provided to the citizens of Spotsylvania County and why the County should consider this funding request.

The Spotsylvania Historical Association (SHA) provides daily support for the operation of the Spotsylvania County Museum by providing personnel, visitor information, gift shop services. The SHA operates the museum on a daily basis except for major holidays. It also provides a website with information and gift shop services. The SHA provides educational programs for County schools on the history of Spotsylvania County and provides special events for County, regional, and national visitors

Program Collaboration

The following should describe, in detail, examples of collaborative efforts and key partnerships between your agency and other programs or agencies in the area.

The SHA works with the County Museum Director to provide support for historical activities. One example was the payment for and placement of historical wayside exhibit markers on Ely's Ford Road. The SHA also works with other regional activities such as the Central Rappahannock Heritage Center to provide information and support for each other's activities

Collaborative Impact

Please describe how the community would be impacted if your agency were dissolved or merged with another partner agency.

Regional Tourism, historical activities and local citizens would be adversely impacted if the SHA ceased to function or merged with another agency. The SHA has for over 54 years provided support to the Museum and local history thru daily operation and programs designed to raise public awareness of Spotsylvania's significant history.

Agency Overview *cont'd*

Program Audience and Service Delivery

The following should describe the agency's intended audience or client base and how those clients are served. This should include the location of the service and what geographic areas are served or targeted for service. If your agency has specific entry or application criteria, please describe it below.

The SHA client base is world-wide. The SHA provides historical information on the County as well as genealogical information to its client base through the museum and written inquiries on a daily basis. Other programs are designed to educate our school children on Spotsylvania's history and traditions. There is an emphasis on the Civil War time frame due to the large public visitation of the local battlefields.

Community Impact

Please provide at least two examples of how your services have impacted members of our community.

Sponsorship of the 150th programs on the Battle of Chancellorsville and the Battles of the Wilderness and Spotsylvania Courthouse. Special events such as Evening with the Generals has fostered community input and broadened awareness of our history.

Client Fees

Please describe the fees clients must pay for the services provided by your agency, and how those fees are determined.

Fees are only charged for special events and determine based on cost versus participation. Fees are also charged for reproductive services of papers and materials for visitors seeking information from our records.

Agency Financial Information

FY 2021 Total Agency Expenditures

	List Program Title/Name	Salary	Benefits	Operating Expenses	Capital Expenses	Total
Program 1	Spotsylvania Grant	35,000				\$35,000
Program 2						\$
Program 3						\$
Program 4						\$
Program 5						\$
Total Agency Expenditures		\$	\$	\$	\$	\$35,000

x

If your application includes funding increases for personnel (to include new positions or merit /COLA increases), please check here and explain in detail the need for this type of increase in the Salary/Benefits Costs section under Agency Budget Justifications.

Total Agency Revenues

	FY 2019 Actual	FY 2020 Budgeted	FY 2021 Projected
Spotsylvania	\$30,720	30,720	35,000
United Way			
Grants	\$1,120	\$1,000	\$1,000
Client Fees			
Fundraising			
Other (explain below)	\$4,500	\$4,500	\$6,000
Total Agency Revenues	\$36,340	\$36,220	\$42,000

Detail below what is included in the 'Other' category:

Proceeds from Gift Shop Sales



On the following page titled "Agency Budget Justifications", please indicate, in detail, reasons for increases or decreases in the amounts requested for FY 2021. Include whether these changes come from increases in personnel, benefits, or operating expenses. If an increase is being requested, please describe the impact not receiving an increase would have on the agency. In particular, please describe in detail if any increase is sought for new positions or personnel.

Agency Budget Justifications

Salary/Benefit Costs

In the box below, provide an overview of any increases or decreases in general personnel expenses for the agency. This would include any planned or projected merit or COLA increases, or new positions being requested. Also include a description of any changes to agency benefits structure or cost.

The SHA anticipates the need to hire new personnel when the movement of the Museum from the Courthouse area to Route 3 takes place. This movement is currently in process. Retention of personnel at minimum wage is almost impossible given the current economics. The agency has requested an additional \$5,000 to increase hourly wages to \$9.00 per hour to offset this situation. **The agency difference in funding from the County versus actual cost for personnel was \$3,633.22**

Operating Costs

In the box below, provide an overview of the administrative costs detailed on the Total Agency Expenditures table for the agency as a whole. Please provide justification for and specific amounts of operating costs that are defrayed by locality funds. If your agency is requesting an increase or decrease in operating funding, please describe, in detail, the reasons for these changes.

Overall operating costs are minimal and considered good value for the service and support we provide the community. The agency has requested an additional \$5,000 to increase hourly wages to \$9.00 per hour to offset this situation. **The agency difference in funding from the County versus actual cost for personnel was \$3,633.22.**

Capital Outlay Costs

In the box below, provide an overview of the capital costs detailed on the Total Agency Expenditures table for the agency as a whole. Please provide justification for and specific amounts of capital costs that are defrayed by locality funds.

None

Agency Budget Issues

Please detail below any legislative initiatives or issues that may impact the agency for the upcoming year and how you are planning for them. This could include new legislation that may increase or decrease projected funding at any level (Federal/State/Local), or could affect grants or designated funds as they are currently received. If you are aware of "outside" funding sources that will expire or be reduced on a set cycle or date, please note those below and how you are planning for them.

None

Please detail below any identified agency needs or areas of concern that are currently not being addressed in your funding request. This could include training or technical assistance for specific areas, administrative support for a program or service, evaluation of current programs, or consultation for strategic planning, board support, or fundraising.

The overall new Museum building is too small to tell our County's history.

Other Agency Information?

Is there any additional information that the agency would like to provide, and that hasn't already been provided in this application, that will help Spotsylvania County in the review of your application and funding determination?

Program Service Data:

Service Period: 2017

to 2018

Locality Served	Total Served		Gender		Race					
	FY2018	FY2019*	Male	Female	Caucasian	African American	Asian	Hispanic	American Indian	Other
	Fredericksburg	3100	3200							
Caroline										
King George										
Spotsylvania	7300	7500								
Stafford										
Other	4800	5200								
Total										

**Please include the projected number to be served in each locality for the upcoming fiscal year.*

Locality Served	Age Groups										Income Levels			
	0-4	5-10	11-13	14-18	19-25	26-40	41-60	60 +	Under \$10,000	\$10,000 - \$19,000	\$20,000 - \$39,000	\$40,000 - \$59,000	Over \$60,000	
	Fredericksburg					500	750	900	1000		500	1900	750	
Caroline														
King George														
Spotsylvania			1000		1000	1500	1800	2000	1,000	1,000	6,000	1500		
Stafford														
Other					500	1000	1300	2000	250	1500	1000	1200		
Total														

Please describe below your data collection methodology and tracking measures. Indicate systems or processes that are used and responsible parties. Please also describe how your projections are determined for the upcoming year. If any of the above information is not available, please indicate why:

Based upon visitation records. Our age group and median income is an estimate based upon size of visitation group and location visited from. We do not track gender or nationality.

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **AUG 28 2017**

SPOTSYLVANIA HISTORICAL ASSOCIATION
INC
PO BOX 64
SPOTSYLVANIA, VA 22553-0000

Employer Identification Number:
54-1265690
DLN:
26053612004517
Contact Person:
CUSTOMER SERVICE ID# 31954
Contact Telephone Number:
(877) 829-5500
Accounting Period Ending:
December 31
Public Charity Status:
509(a)(2)
Form 990/990-EZ/990-N Required:
Yes
Effective Date of Exemption:
July 28, 2017
Contribution Deductibility:
Yes
Addendum Applies:
Yes

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 947

SPOTSYLVANIA HISTORICAL ASSOCIATION

Sincerely,

Stephen A. Martin

Director, Exempt Organizations
Rulings and Agreements

Enclosure:
Addendum

SPOTSYLVANIA HISTORICAL ASSOCIATION

ADDENDUM

If you have been in existence for at least three years and you have not filed a Form 990 return or notice for three consecutive years, you may soon receive a letter (Notice CP120A) that we automatically revoked your exempt status, as required by law, for failure to file a return or notice for three consecutive years. This letter will serve to reinstate your exempt status, so you will not need to re-apply. However, you may need to file the appropriate delinquent Forms 990 for all years you have operated as a tax-exempt organization.

Based on the information submitted in your application, we're treating your Form 1023-EZ as an application for reinstatement under Revenue Procedure 2014-11. Your effective date of exemption, as shown in the heading of this letter, is the submission date of your application.

Spotsylvania Historical Association

Income, expenses and balance of culmative funds

for the year ended December 31, 2018

	2019	2018
Income	Amount	Amount
Donations		\$5,657.40
Grants		\$1,120.00
Grant Spotsylvania County - Personnel		\$30,720.00
Events and Fundraising		\$785.90
Membership Fees		\$35.00
Interest Earned		\$0.27
Gift Shop Proceeds		\$4,727.10
Total Income	0	\$43,045.67

	Amount	Amount
Expenses		
Programmatic Activities		\$905.14
Educational Programs		
Overhead		\$508.79
Grant Spotsylvania County - Personnel (\$3,633.22)		\$34,353.22
Membership/Employee Recruitment		

Form 990-N

Electronic Notice (e-Postcard)

OMB No. 1545-2085

Department of the Treasury
Internal Revenue Service

for Tax-Exempt Organization not Required to File Form 990 or 990-EZ

2018

Open to Public Inspection

A For the 2018 Calendar year, or tax year beginning 2018-01-01 and ending 2018-12-31

B Check if available

- Terminated for Business
- Gross receipts are normally \$50,000 or less

C Name of Organization: SPOTSYLVANIA HISTORICAL ASSN
INC
PO Box 64, Spotsylvania,
VA, US, 22553

D Employee Identification
 Number 54-1265690

E Website:

F Name of Principal Officer: Sarah Dye
PO Box, Spotsylvania, VA,
US, 22553

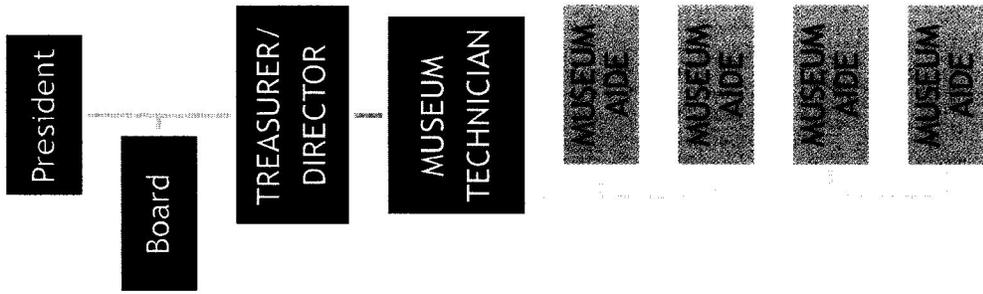
Privacy Act and Paperwork Reduction Act Notice: We ask for the information on this form to carry out the Internal Revenue laws of the United States. You are required to give us the information. We need it to ensure that you are complying with these laws.

The organization is not required to provide information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. The rules governing the confidentiality of the Form 990-N is covered in code section 6104.

The time needed to complete and file this form and related schedules will vary depending on the individual circumstances. The estimated average times is 15 minutes.

Note: This image is provided for your records only. Do Not mail this page to the IRS. The IRS will not accept this filing via paper. You must file your Form 990-N (e-Postcard) electronically.

SPOTSYLVANIA HISTORICAL ASSOCIATION
ORGANIZATIONAL CHART





P.O. Box 64
Spotsylvania, VA 22553
July 18, 2016

Members of the Board

John Pruitt Jr.,
9201 Elys Ford Road
Fredericksburg, Virginia 22407
540-786-3144
President

Steve Lampert
6620 Massaponax Church Rd
Spotsylvania VA 22551-2217
Member

3rd member Currently Vacant

Sarah Dye
15 Bershire Ln
Spotsylvania, VA 22553
540-656-7695

Spotsylvania Historical Association Strategic Plan

2018 - 2023

Our Vision

To instill pride for the history of Spotsylvania, from before the birth of our nation to today. To provide events and programs for audiences of all ages that offer historical education based on facts. To see local historic sites preserved and enjoyed by the public. To preserve the past for future generations.

Our Values

- Education
- Integrity
- Service
- Transparency

Our Mission The SHA is a non-profit organization whose mission is to promote the history of Spotsylvania County in its entirety. Through exhibitions, educational programs, partnerships, and collections support, the society works to create a greater knowledge and appreciation for our County and American history in audiences of all ages.

Our Long-term Strategic Goals

Heritage: Promote public interest in the preservation of sites and buildings of historic and architectural significance and to offer encouragement to the owners for the preservation of such properties

Genealogy: Promote and participate in research of the cultural, historical, and scientific aspects of our heritage.

Education: Make the past more relevant to the present generation by supporting a perpetual educational program.

Support: Provide Collections support to the Spotsylvania County Museum for the enhancement and appreciation of our heritage.

Expansion: Encourage the construction of a new Cultural Heritage Center at Lick Run. Support continuing expansion of the archival and research library collections of the Museum.

History: Promote and nurture an awareness of the history of Spotsylvania County and its contributions to the building of our nation.

