

**COMMUNITY EVENTS FUNDING REQUEST**

Due: February 12, 2015

Event Name:

Curtis Tigard 106<sup>th</sup> Birthday Celebration – April 11, 2015

THA Annual Meeting— June 13, 2015

Ice Cream Social— July 11, 2015

Apple Harvest— September 12, 2015

Victorian Christmas— December 12, 2015

Address: John Tigard House, Mailing address: P.O. Box 230402

City, State, Zip: Tigard, Oregon 97281

Contact Name: Karen Sadler-Fredd

Telephone Number: 503-620-5695 or Martha Worley at 503-747-9856

E-mail address: Sadfredd@hotmail.com

**1. Request (express in whole dollar amounts only)**

**Cash** \$1500.00

**In-Kind Services-hours** (use of City property, City staff support,  
etc. Please explain the services requested on a separate sheet) 0

**Total Request** \$1500.00

**2. Purpose of Funding Request:**

Funding will help defray the costs of the annual events listed above.

**3. How will this event benefit the Tigard Community?**

The goals of each of the THA events are 1. To provide a venue where all family members can interact with other Tigard community families or individuals in a wholesome, safe environment. 2. To provide an event that will re-acquaint Tigard families with historical American community traditions. 3. To provide events where Tigard families can feel a connection with the community of Tigard and contribute toward the enrichment of the culture that is uniquely Tigard and feel like active participants in community life.

Our THA events have free admission so that no family member is prohibited by cost to attend. Each event provides a creative learning opportunity for children, and often there is a project they can make and take home. Most of our events take place on the grounds of the John Tigard House Museum. A docent-led tour of the House is a terrific opportunity for Tigard residents to learn about the founding of Tigardville and how it grew into today's Tigard.

**4. How many Tigard residents do you anticipate participating in this event (or these events)?**

Approximately 600 annually

**5. Please submit the following information with this request:**

- a. Most recent annual budget compared with the prior year's actual revenues and expenditures. The Budget should identify the period to which it applies, beginning and ending balances, major revenue sources, major expenditure categories, and number of authorized positions.
- b. Audit report or financial statements for the last fiscal year.
- c. Articles of Incorporation.\*
- d. 501(c)(3) status.\*
- e. Organization Bylaws\*

\* Information not required if it has been submitted at least once in the last five years.

Please note that a lack of adequate financial information could result in denial of request.

Karen Sadler-Freedl  
K. Sadler-Freedl 2-11-15

Tigard Historical Association Operating Budget 2014-2015

Receipts

	2014	2015 Projected
Memberships	\$ 1,431.00	\$ 1,800.00
Whole Foods	\$ 200.00	\$ -
PGE community grant	\$ 400.00	\$ 200.00
Donations/gift shop/books	\$ 503.30	\$ 600.00
City of Tigard Grant	\$ 1,500.00	\$ 1,500.00
Other		
TOTAL	\$ 4,034.30	\$ 4,100.00

Expenditures

PO Box	\$ 62.00	\$ 62.00
Chrome Book	\$ 216.98	\$ -
Building repairs/maintenance	\$ 393.00	\$ 500.00
Collections, misc	\$ 134.17	\$ 500.00
Insurance	\$ 2,502.00	\$ 2,800.00
Alarm installation	\$ 417.00	\$ -
Office/postage/misc	\$ 352.44	\$ 500.00
State/dept of justice	\$ 86.00	\$ 90.00
Board training	\$ -	\$ 200.00
Printing/ newsletter	\$ 543.37	\$ 600.00
Events	\$ 835.67	\$ 900.00
Utilities	\$ 2,919.64	\$ 3,200.00
all other misc.	\$ 23.82	\$ 300.00
	\$ 8,486.09	\$ 9,652.00

Tigard Historical Association  
Treasurer's Report  
1/1/2014 - 3/31/2014

**Preservation account**

Beginning balance	\$	11,081.24
deposits		
interest	\$	12.28
expenditures	\$	-
Ending Balance	\$	11,093.52

**General Fund**

Beginning balance	\$	2,923.75
deposits		
memberships	\$	250.00
book sale	\$	20.00
interest	\$	0.94
refund of stamps	\$	59.75
<b>TOTAL</b>	<b>\$</b>	<b>330.69</b>
expenditures		
Arciform (short)	\$	158.00
newsletter	\$	94.26
events (xmas)	\$	28.95
utilities/alarm	\$	919.86
misc. supplies	\$	15.85
archival supplies/displays	\$	134.17
insurance	\$	1,298.00
office/misc supplies/postage	\$	60.88
<b>TOTAL</b>	<b>\$</b>	<b>2,709.97</b>
Ending balance	\$	544.47

**Waddell and Reed**

Beginning Balance	\$	212,444.05
Ending Balance	\$	214,453.23

**Columbia Management**

Beginning Balance	\$	30,391.16
Ending Balance	\$	30,753.20

Tigard Historical Association  
Treasurer's Report  
4/1/2014 - 6/30/2014

**Preservation account**

Beginning balance	\$	11,093.52
deposits		
interest	\$	11.85
expenditures	\$	-
xfer to checking	\$	1,000.00
 Ending Balance	 \$	 10,105.37

**General Fund**

Beginning balance	\$	544.47
deposits		
memberships	\$	476.00
xfer from preservation	\$	1,000.00
PGE community grant	\$	400.00
donation jar	\$	3.00
book	\$	21.00
C Tigard b-day	\$	94.00
interest	\$	0.45
<b>TOTAL</b>	<b>\$</b>	<b>1,994.45</b>
expenditures		
Chrome book	\$	216.98
newsletter	\$	180.91
events	\$	190.57
utilities/alarm	\$	598.93
Dept of Justice annual	\$	36.00
office/misc supplies/postage	\$	49.00
<b>TOTAL</b>	<b>\$</b>	<b>1,272.39</b>
 Ending balance	 \$	 1,266.53

**Waddell and Reed**

Beginning Balance	\$	214,453.23
Ending Balance	\$	220,851.02

**Columbia Management**

Beginning Balance	\$	30,753.20
Ending Balance	\$	32,107.96

Tigard Historical Association  
 Treasurer's Report  
 7/1/2014 - 9/30/2014

**Preservation account**

Beginning balance	\$	10,105.37
deposits		
interest	\$	9.84
expenditures		
xfer to checking	\$	2,000.00
 <b>Ending Balance</b>	 <b>\$</b>	 <b>8,115.21</b>

**General Fund**

Beginning balance	\$	1,199.00	*ending 6/30 balance c
deposits			
memberships	\$	80.00	
xfer from preservation	\$	2,000.00	
Ice cream social	\$	115.80	
book/ sales	\$	80.00	
interest	\$	0.93	
 <b>TOTAL</b>	 <b>\$</b>	 <b>2,276.73</b>	
expenditures			
Bee contol NW	\$	235.00	
postage	\$	49.00	
newsletter	\$	151.58	
events	\$	421.21	
alarm installation	\$	417.00	
utilities/alarm	\$	640.05	
Corporation Division	\$	50.00	
office/misc supplies	\$	41.84	
<b>TOTAL</b>	<b>\$</b>	<b>2,005.68</b>	
 <b>Ending balance</b>	 <b>\$</b>	 <b>1,470.05</b>	

**Waddell and Reed**

Beginning Balance	\$	220,851.02
Ending Balance		*statement not yet received

**Columbia Management**

Beginning Balance	\$	32,107.96
Ending Balance	\$	32,455.36

Tigard Historical Association  
Treasurer's Report  
4th Qtr. 2014

**Preservation account**

Beginning balance	\$	8,115.21
deposits		
interest	\$	9.19
expenditures	\$	-
 <b>Ending Balance</b>	 \$	 <b>8,124.40</b>

**General Fund**

Beginning balance	\$	1,470.05
deposits		
memberships	\$	625.00
City of Tigard grant	\$	1,500.00
Fall harvest donations	\$	147.50
Charles Schwab	\$	53.15
Whole Foods	\$	200.00
book/ sales	\$	25.00
interest	\$	1.32
<b>TOTAL</b>	 \$	 <b>2,551.97</b>

expenditures

sign - Signscope	\$	130.00
holiday lighting	\$	60.82
Santa	\$	30.00
postage	\$	49.00
newsletter	\$	116.62
events -xmas	\$	34.94
insurance	\$	1,204.00
utilities/alarm	\$	760.80
alarm permit	\$	25.00
office/misc supplies	\$	86.87
<b>TOTAL</b>	 \$	 <b>2,498.05</b>

<b>Ending balance</b>	<b>\$</b>	<b>1,523.97</b>
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<b>Waddell and Reed</b>	Beginning Balance	\$	217,169.70
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	Ending Balance	\$	217,565.76
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<b>Columbia Management</b>	Beginning Balance	\$	32,455.36
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	Ending Balance	\$	33,799.57
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