

Annual Report



July 1, 2022 - June 30, 2023



Historical Society
of Pennsylvania

PHILADELPHIA'S LIBRARY
OF AMERICAN HISTORY

A Year in Review

Education

Introduction



2022-23 was a year of continued growth for the Historical Society of Pennsylvania. Guided by its forward-looking strategic plan, HSP worked toward fulfilling its mission while preparing to celebrate its 200th birthday in 2024. In the following report, you will read about the completion of a significant renovations project, HSP's leadership of National History Day, an expansion of genealogical offerings, newly added collections, and more. HSP

is proud to serve as Philadelphia's Library of American History. Thank you for your continued friendship and support!

1,098

Members

1,094

Donors

Donor Spotlight

In October 2022, HSP learned that it had been named the sole beneficiary of the estate of Mr. James Serl Ritchie. Mr. Ritchie lived his life in Superior, Wisconsin, but had deep family ties to early Philadelphia and a passion for the Ritchie legacy. We honored Mr. Ritchie's generosity by investing in HSP's future and sustainability through endowment growth and other strategic initiatives.

HSP Leads National History Day Philly

In 2023, HSP became the steward of National History Day (NHD) Philadelphia, the local affiliate competition of National History Day, an award-winning academic program that helps develop lifelong critical thinking skills and civics participation.

Hosted at the National Constitution Center in March, the competition was held in-person for the first time since 2019. Philadelphia students from 6th through 12th grade chose a topic related to the theme "Frontiers in History," which they then used to produce a paper, documentary, website, exhibit, or performance. 108 students from across the city presented their projects. From that group, 44 students went on to Pennsylvania's state competition, followed by 11 students qualifying for the national competition.



Preparation for the program focused on reengaging with a large network of schools, teachers, museums, and volunteers. Under HSP's new leadership and with the help of 3 new steering committee members, 22 partner institutions, and 79 day-of volunteers, NHD was a successful and inspiring event.

One student reflected on the event, saying, "The NHD process taught me so much, such as how to research, how to create a documentary, and how to structure an argument. I was able to dive into a topic that I enjoyed researching, and I think that all [students] could benefit academically from exploring a topic that they themselves choose." A program like NHD is uniquely poignant in Philadelphia where every participating student is surrounded by reminders of their place in history. The competition provides them with the chance to engage with the past, work towards a goal in collaboration with others, and develop skills that will serve them in the future.

Highlights

HSP Renovates Interior

HSP's last annual report announced the start of a comprehensive exterior renovation and lighting project. The successfully completed project received a Grand Jury Award from the Preservation Alliance of Greater Philadelphia this year. A complete restoration of the building's stone and brick facade resolved moisture issues and a new exterior lighting concept illuminates the building's beautiful architecture. HSP continued its capital improvements in 2023, focusing on the interior of its 114-year-old building, specifically the public-serving spaces on the first and second floors.



HSP's lobby and Information Commons were reconfigured with an open layout, classic furnishings, and warmer lighting to improve the functionality and aesthetic of the public spaces. A stunning mural of a 1796 map of Philadelphia adorns the lobby's western wall illustrating the city's expansion in its first century. Updated technology includes new computers and improved Wi-Fi to provide a quality research experience for all patrons.



Renovations to the second-floor Patterson Room equipped the room to serve as a multi-purpose space for lectures, meetings, seminars, and parties (including event rentals) with updated projectors, screens, and speakers. The removal of old bookshelves, a paint job, and new carpeting freshen the room. With its new layout, HSP can carry out impactful programming with improved accessibility and seating options to accommodate hybrid programming and larger audiences both in-person and virtually.

HSP will continue its capital improvements with a critical IT infrastructure upgrade throughout the building to improve staff efficiency, data security, and reliable access to HSP's numerous catalogs and databases. HSP is grateful to the donors who continue to invest in HSP's future by making this important and necessary work possible.

Engaging with the Public



Through a dynamic blend of hybrid, virtual, and onsite programming, HSP hosted over two dozen events featuring over 40 presenters. These programs ranged from genealogy workshops to history-focused events, including a walking tour exploring the 1838 Black Metropolis and the Dickinson Symposium, co-hosted with the American Philosophical Society, the Library Company of Philadelphia, and the McNeil Center for Early American Studies.

HSP also strengthened its partnership with the Genealogical Society of Pennsylvania, hosting a two day seminar called the Family History Sampler. This hybrid event featured three top genealogy experts who offered research insights on accessing and interpreting historical records.

Other program topics spanned a wide range, covering women's history, Black history, Asian history, early American history, and Philadelphia politics. These programs served over 1,000 attendees, deepening their understanding of the past, while offering new perspectives on the present.

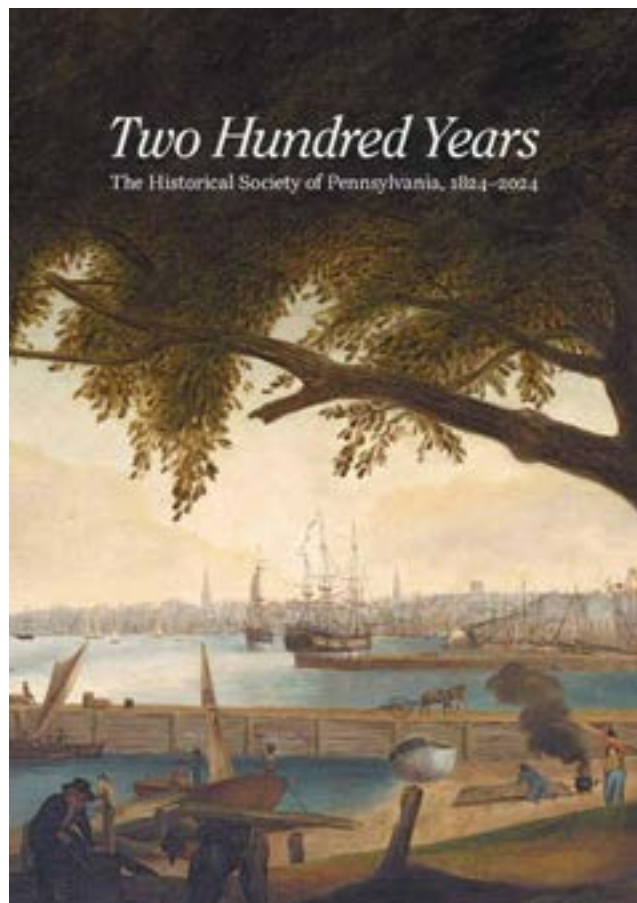
Social Media Followers



@historicalpa

3,640
Event
Attendees

Preparing for our 200th Anniversary



In a continued effort to prepare for the upcoming 200th anniversary, HSP's editorial team worked closely with historians and experts from around the country to compose *Two Hundred Years: The Historical Society of Pennsylvania, 1824-2024*, an edited book which highlights the best of what our collection has to offer.

The volume features 100 items (from our collection of over 21 million), selected to shed light on the unique verity and lasting importance of HSP's collections. The team of authors containing top scholars, Pulitzer-prize winning historians, and local academics dove deep into the history and context of the chosen items to reinterpret old favorites and identify those which may have been unfamiliar.

Published in October 2023, this text will serve as great tool for continued scholarship, promotion, and stewardship as we enter HSP's third century.

Around the Library

HSP Expands and Cares for Collections

HSP is recognized in the research community for the depth and breadth of its archival collections, but many are not aware that HSP is an actively collecting special collections research library. In the past year, HSP accessioned 27 new collections (totaling over 170 linear feet).

Collections can range in size from a single photograph or map, to dozens of boxes of family papers or institutional records. One



example is the donation of the Montgomery, Scott, Wheeler Families papers encompassing 103 boxes, 142 volumes, and 11 flat files. The collection contains letters, diaries, business records, architectural drawings, photographs, scrapbooks and more. These documents trace the family's contributions to the Pennsylvania Railroad, the legal and banking professions, military service, the arts, dairy farming, fox hunting, social histories, and many other topics.



Continuously adding to the breadth and depth of its collections will continue to keep HSP relevant in our 200th year and beyond.

27 New Collections

170.3 Linear Feet



By the Numbers

2,139 Onsite Researchers

23 Items Loaned for Exhibitions

32 New Finding Aids

367 Research Requests

493 K-12 Students Served

203 Rights & Reproductions Requests

1,264 Remote Reference Questions Answered

14 Collections Conserved

126 Individual Items Conserved

Donors

\$50,000+

Alice L. George
Mr. and Mrs. J. Rudy Lewis
Eric W. and Georgiana W. Noll
Mr. and Mrs. Philip Price Jr.*
Mr. Henry B. Dup. Smith
The Estate of Mr. Peter Willing

\$10,000 - 49,999

Jim and Janet Averill
Teresa Gavigan and Larry Besnoff
Mrs. Lois Brodsky
Lori Cohen
Mr. George W. Connell
Ginger and H. Richard Dietrich III
Mrs. Martha Hamilton Morris
Dale and Susan Heist
Mrs. Martha Hutson-Saxton
Marguerite Lenfest
Maxine de S. Lewis

\$5,000 - 9,999

Sandy Cadwalader
Estate of Mrs. Shirley Claypool
Mr. and Mrs. David Fleischner
Lois and Walter Licht
Mr. and Mrs. Richardson T. Merriman
Kenneth and Laura Mitchell
Mr. Robert Montgomery
Dr. William Owen
Elizabeth Milroy and Diana Post
Jay and Marilynne Rose
Mr. Edgar Scott, Jr.
Denise J. Smyler and Kevin A. Dillon
Mr. William Webster

\$1,500 - 4,999

Julie and Jim Alexandre
Mr. and Mrs. Ronald C. Anderson
Doug Schaller and David Barquist
Margaret Chew Barringer
Linda Seyda and Bob Boris
Robert Bryan and Julie Jensen Bryan

Theodore and Nancie Burkett
Mr. and Mrs. Donald R. Caldwell
Estate of Mr. David W. Cassedy
Mr. and Mrs. Peter Cooke, Jr.
Dr. Charles T. Cullen
Donna L. Serrano Diaz
Betsy and Kevin Donohoe
Roger Doucette
Peggy P. Duckett
Mr. and Mrs. Jeffrey S. Engelman
Florence and Spencer Ervin
Alexandra M. Estey
Beatrice B. Garvan
Ms. Elizabeth H. Gemmill
Mr. and Mrs. Bruce Gorby
Mr. Julian and Mrs. Kate Jiggins
Margot and Robert Keith
Mr. John M. Kirsner, Esq.
Susan and Leonard Klehr
Mr. and Mrs. Stephen L. Kurtz
Mr. Albert Murphy III
Mr. George McNeely IV
Honorable Marjorie Margolies
Diane and Bill Marimow
David W. Maxey and Catharine E. Maxey
Randall M. Miller
Paul Sperry and Beatrice Mitchell
Judy and Jerry Novick
Ned Donoghue & Peggy O'Donnell
Lanny R. Patten
Nathan Raab and Karen Pearlman Raab
Henry F. Reichner
Robert and Suzanne Rittenhouse
Mr. Gregory Schwab and Mr. Richard Roccato
Mr. Tim R. Schantz
Lorna M. Weir and Mark A. Sheehan
Mr. Robert Sher
Mrs. Rebecca Sitarchuk and Mr. Eric Sitarchuk
Mr. Jay Robert Stiefel
Mr. and Mrs. Charles T. Wilmerding
Mr. Gregory Wilson
Barbara Eberlein and Jerry Wind
Ken Woodcock
Mr. and Mrs. Donald R. Caldwell

\$1,000 - 1,499

Anonymous
Sharon Bisaha
Mr. and Mrs. William Buck
Mr. Peter A. Benoliel and Ms. Willo Carey
Susan W. DuBois
Ms. Alexandra Edsall
Ms. Ashley Ganz
Dr. Robert M. Hauser
Ivan J. Jurin
Ms. Cynthia Keler
Ms. Rose Kottke

Sally and Tod MacKenzie
Ms. Joan W. Mackie
Debby Peikes and Robby Cohen
Steven J. Peitzman, MD
Mr. Jamie Neilson
Mr. Garry O'Rourke
Mr. Keith and Suzanne Orris
Mr. and Mrs. Jay Roberts
Charles and Mary Ulmann
Mr. Carmen D. Valentino
Ms. Anne Louise C. Van Nostrand
Mr. and Mrs. Harrison M. Wright

\$500-999

Mr. George J. Ahern
Anonymous
James Beidler
LiRon Anderson-Bell and Glenn Bell
Ms. Margaretta Bickford
Rolin and Avery Bissell
Roger S. Brody
Emily T. Cooperman
G. Jeremy Cummin and Hutchinson Cummin
Tobey and Mark Dichter
Doris D. and Robert K. Fanelli
Mr. and Mrs. Boyd L. George
Mr. and Mrs. Neil Gilmour
Bill and Katie Haines
Dr. Emma Hart
Hannah L. Henderson
Sandra M. Hewlett, C.G.
Dr. Martin Heyworth
Mr. Robert W. Hull
Mrs. Samuel M. Freeman II
Krishna Lahiri
Cynthia J. Little
George W.G. McCarter
Ms. Dagmar E. McGill
Mr. and Mrs. John Mears
Mr. William Mitchell
Vernon R. Morris Jr., M.D.
Dr. and Mrs. John A. Murray Jr.
Mr. James R. Nagle
Carla L. Peterson
Ms. Wendy Raspanti
Mr. and Mrs. Lloyd B. Roach
Hal and Sue Rosenthal
Mrs. and Mr. Louise R. Rosett
Ms. Sharon Schultz
Ms. Susan Thompson
Dr. Lona Farr and Mr. David Voellinger
Sedgwick and Pamela Ward
Mr. Scott M. Wilds
Mr. Leland Wilson

See list of additional donors [here](#).

Organizational Supporters

African American Genealogy Group
Allen County Public Library
Amaranth Foundation
Amerihealth Mercy Family of Companies
Anonymous
BBD, LLP
Canon-McMillan Sr HS
Chubb Charitable Foundation
Comcast Cable Communications
The Connelly Foundation
Dolfinger-McMahon Foundation
Elliott Lewis Corporation
Fiduciary Trust International
Gladys Krieble Delmas Foundation
Green Tree Perpetual Assurance Company
The Haverford Trust Company
I-SITE
Independence Blue Cross
ITData Inc
Ivywood Foundation
Jacobs/Wyper Architects, LLP
James Serl Ritchie III Estate
Joseph B. Callaghan, Inc. (JBC, Inc.)
The Library Company of Philadelphia
Library of Congress
Lindback Foundation
Lynnewood Hall Preservation Foundation, Inc
The McCausland Family Foundation
The McLean Contributionship
Meridian Bank
Museum of the American Revolution
The National Constitution Center
National Endowment for the Humanities
National Society of Colonial Dames
Pennsylvania Historical and Museum Commission
The Pennsylvania Society Endowment Fund of the Philadelphia Foundation
Pottsgrove Manor
The Quaker City Foundation
Quita Woodward Foundation Trust
Resident's Association of Waverly Heights
Right Angle Club of Philadelphia
The RMHauser Family Fund c/o Vanguard Charitable
SAW Restoration
SEPTA
St. David's Episcopal Church (Radnor)
The Swiss Benevolent Society
The Thomas Fisher Endowed Designated Fund
Thornedge Foundation
University of Pennsylvania
VSP Vision
The Walter J. Miller Trust
Wells Fargo
William B. Dietrich Foundation
The William Penn Foundation
Wolters Kluwer Health

Staff

Lee Arnold*	Margaret Maxey
Katy Bodenhorn Barnes	Ryan McCarthy
Justina Barrett	Kris Myers
Selena Bemak	Sara Nash
Taylor Berkoski*	Tara O'Brien
David Brigham	Mary Offenback
Katie Clark	Erin Paulson*
Chris Damiani	Jeremy Quiles
Anthony DiGiovanni	Sarah Ruesch
Briana Giasullo*	Steven Smith
JC Hatalski	Nova Sturchio
Cary Hutto	Andrew Williams
Christina Larocco	Anjeza Xhemali*

*partial term employee

Board of Councilors

Executive Committee

Eric W. Noll, Board Chair, Context Capital Partners, CEO
J. Rudy Lewis, Executive Vice Chair, Neighborly Living, LLC, Owner
Elizabeth (LiLy) Milroy, Secretary, Antoinette Westphal College of Media Arts & Design, Drexel University, Professor Emerita of Art & Art History
Jay Rose, Treasurer, Woodcock Washburn LLP, Executive Director (Retired)
Dale Heist, Esq., Vice Chair for Audit, Baker & Hostetler LLP, Partner (Retired)
Alice L. George, Vice Chair for Collections and Programs, Independent Historian & Author
Lori E. Cohen, Vice Chair for Institutional Advancement, Arader Galleries, Director & Partner
Dr. Martha "Missy" Hutson-Saxton, At-Large Member of the Executive Committee, Independent Art Historian & Scholar
David A. Othmer, At-Large Member of the Executive Committee, Independent Strategic Planning Consultant (Former Station Manager, WHYI)

Councilors

LiRon Anderson-Bell, President, Anderson Bell Strategic Communications, LLC

Paul A. E. Cummings, Fiduciary Trust International, Head of Family Office Services, Foundations & Endowments

H. Richard Dietrich III, Dietrich American Foundation, President

Teresa Gavigan, Attorney and Experienced HR Executive

Curlee R. Holton, David C. Driskell Center (Univ. of Maryland), Executive Director

Walter M. Licht, University of Pennsylvania, Walter H. Annenberg Professor of History Emeritus

John C. McMeekin II, Rawle & Henderson LLP, Partner

Georgiana Noll, Community Leader and Philanthropist

Tom Riley, Connelly Foundation, President

Paul Roberts, Freeman's Auction, President

Timothy R. Schantz, History Factory, Chief Administrative Officer, Clear Harbor Asset Management, Vice Chairman

Henry B. Smith ("Hank"), The Haverford Trust Company, Director and Head of Investment Strategy

Denise J. Smyler, Esquire, Chair, Commonwealth of Pennsylvania's Gaming Control Board

Kalela Williams, Mighty Writers, Director of Writing

Ex Officio/Emeritus

Henry Lafayette Collins III

George W. Connell

Bruce Fenton, Chairman Emeritus

Collin F. McNeil

David W. Maxey*

Charles E. Mather III*

Sarah D. Price

Representative James R. Roebuck, Jr., Pennsylvania House of Representatives*

Alice Lea M. Tasman

Harrison M. Wright

*deceased

Financial Review

Statements of Financial Position

June 30, 2023 and 2022

Assets	2023	2022
Cash	\$ 201,321	\$ 865,600
Contributions receivable	1,841,848	2,211,268
Prepaid expenses and other	58,298	87,375
Investments	12,020,366	11,764,745
Property & equipment (net)	8,323,423	6,249,235
Beneficial interest in perpetual trusts	8,773,000	8,341,000
Collections	-	-
Total Assets	\$ 31,218,256	\$ 29,519,223
Liabilities		
Line of Credit	665,500	-
Accounts payable and accrued expenses	460,989	457,819
Total Liabilities	\$ 1,126,489	\$ 457,819
Net Assets		
Without donor restrictions	\$ 5,171,528	\$ 3,108,027
With donor restrictions		
Purpose and time restrictions	1,826,8273	3,547,632
To be maintained indefinitely	23,093,366	25,953,377
	25,953,377	27,564,107
Total Net Assets	\$ 30,091,767	\$ 29,061,404
Total Liabilities and Net Assets	\$ 31,218,256	\$ 29,519,223

Statements of Activities

June 30, 2023 and 2022

Revenues, Gains, and Other Support	2023	2022
Contributions and grants	\$ 2,383,323	\$4,043,990
Interest and dividends	230,216	274,667
Distributions from perpetual trusts	407,381	453,871
Auxiliary activities	291,034	144,245
Employee retention credits	132,043	102,098
Forgiveness of loan payable - Paycheck Protection Program	-	335,850
Other	81,147	35,397
Net assets released from restrictions		
Satisfaction of program restrictions	-	-
Endowment spending policy	-	-
Total Revenue, Gains & Support	\$ 3,540,144	\$ 5,390,118

Expenses

Program services		
Library and collections	\$ 1,574,823	\$ 1,586,386
Programs, publications, and special projects	486,582	343,981
Supporting Services		
Fundraising	438,807	379,290
Administration	739,382	710,541
Total Expenses	\$ 3,239,594	\$ 3,020,198
Change in Net Assets	\$ 300,550	\$ 2,369,920