2024 ANNUAL REPORT RICHARD III SOCIETY, INC. AMERICAN BRANCH

Report from the Chair, Susan Troxell

I chaired all bi-monthly meetings of the Board of Directors, and attended the 2024 AGM in the UK as a representative of the American Branch. I also acted as moderator to all our Zoom talks and chaired the GMM in Santa Fe, NM. Looking at the past year, I see many achievements for our branch, including:

- Publication of two high-quality issues of the Ricardian Register journal
- Circulation of our bi-annual digital newsletter Ricardian Chronicle
- Significant increase in membership (up 35% compared to 2022)
- A fun, educational and successful GMM in Santa Fe
- Successful program of American Branch Zoom talks
- Creation of Twitter, BlueSky, Instagram & private YouTube channel
- Brought a new Chapters Coordinator (Liz Bateman) on board
- Special Project FLP Lewis MS E201 the "Edward IV Roll"
- Increased presence in the UK's Ricardian Bulletin magazine
- Secured a new Editor (Tara Kolden) for American Branch publications
- Increased Schallek Fellowship and Awards to \$40,000 and \$5,000
- Gave the second-ever Plantagenet Angel award (Pauline Calkin)
- Received over \$17,000 in cash donations

There are so many volunteers to thank for these achievements, but to name a few: everyone on the Board of Directors (Wayne Ingalls, Deborah Kaback, Sally Keil, Joan Szechtman, Carole Bell, Mary Miller, Compton Reeves), Liz Bateman, Pauline Calkin, Tara Kolden, Cheryl Greer, Laura Blanchard, Diana Rubino, Myrna Smith, Andy Hart, and - last but not least - Dawn and Pete Shafer for organizing the 2024 GMM. I am grateful for the opportunity to serve as chair, as the mission of the American Branch is very close to my heart.

I do see some future challenges for our Branch. These include how to weather future increases in dues from the UK CLG, how to generate more volunteers for the Branch, and how to generate more content for print, digital, and social media.



Report from Membership Chair Wayne Ingalls

Membership continues to grow in our American Branch of the Richard III Society. At the 2020 GMM, our membership stood at 325 members. At the 2022 GMM, we were 357 members strong. As of the 2024 GMM, we had 481 memberships of all levels. However, when we consider that 44 of those memberships are Family Memberships, we have 525 total members. Our membership total today is 162% of our numbers just four years ago, a net gain of 200 members.

It has been three years since the Richard III Society, CLG (Company Limited by Guarantee) in the UK began mailing publications directly to the home address of American Branch CLG members. The reason the CLG started that practice was due to Royal Mail postal increases for bulk mail. It was less expensive for the CLG to mail directly to members rather than sending in bulk to a US distributor for remailing to individual members. For more than two years, the CLG used my mailing address as the "Return to Sender" address so that I could research address changes and then remail to the member's new address. Early this year, Royal Mail rules changed, and any returned mailings were sent to my Membership counterpart in the UK. However, the CLG continues to send bulk copies of publications to account for lost mailings and new members, and I am notified by my counterpart if any publications are returned to her. So, I mail replacement copies to American Branch members rather than wait on remailing from the UK. In general, the trend is for CLG publications to arrive sooner in American mailboxes, but there also seems to be persistent issues with some members receiving their publications on time or at all.

To avoid delays with overseas mailings, American Branch members will now have a choice whether to continue to receive printed publications by mail or to save on printing costs and the overseas mailing surcharge by opting for a "digital only" membership/subscription. The default choice is to continue with printed publications until the membership renewal date, at which time the member may opt for the "digital only" membership/subscription at a lower cost relative to the printed publications option.

Due to some unclear wording in CLG emails or on inserts into the CLG's quarterly Ricardian Bulletin, some members have mistakenly sent payments



directly to the CLG in the UK. The wording has been confusing, but membership renewals for American Branch members always go to the Membership Chair, never directly to the UK.

Overall, despite some turbulence and growing pains, the outlook from Membership is extremely positive.

Report from Treasurer Deborah Kaback

At the 2024 GMM, members heard a complete financial analysis presented by the Chair and Treasurer. In response to increasing costs and the large increases in what we have to pay the UK Society for our members to receive their UK publications and benefits, and to avoid the resulting budget deficits these increases would cause, American Branch members voted to increase the dues structure of the Branch starting January 1, 2025 to the following tiers:

\$60	All publications	available in	Digital-only form	1
------	------------------	--------------	-------------------	---

\$75 Individual, with publications being mailed

\$80 Family (2 or more in household), publications mailed

\$100 Fotheringhay "sponsorship" level

TREASURER'S REPORT

Income	2024	2023	
Dues	\$ 24,517.44**	\$ 32,925.41	
Gifts General Fund	\$ 17,596.97	\$ 16,933.82	
Dividends	\$ 5,671.43	\$ 4,784.67	
Amazon Smile	discontinued	\$ 112.07	
Interest	\$ 0	\$	0
Gifts in Kind - Goods	\$ 309.00	\$	0
Gifts McGee Fund	suspended	\$	0
Gifts Schalleck Fund	\$ 0	\$	0
Gifts Weinsoft Fund	suspended	\$ 40.00	
GMM Registration Fees	\$ 4,770.50	\$	0
Additional Registers	\$ 0	\$	0
Total Income	\$ 52,865.34	\$ 54,795.97	

^{**} approximately \$9,000 of dues were received by Paypal and are not included here. We received just over \$33,000 in dues in 2024.



Investments (Non-cash)	2024	2023	
Unrealized Gain/(Loss)	\$ (3,646.93)	\$ 3,729.57	
Expenses	2024	2023	
UK Society Dues	\$ 18,495.92	\$ 14,961.76	
UK Overseas Direct Mailings	\$ 7,192.86	\$ 8,977.05	
Grant Research - UPENN	\$ 2,375.00	\$ 4,250.00	
Ricardian Register	\$ 2,724.50	\$ 2,748.42	
Fiction Library Expense	\$ 2,724.50 \$ 259.00	\$ 2,740.42	
· · · · · · · · · · · · · · · · · · ·	\$ 81.31	\$ 37.74	
Non Fiction Library Expense Bank Wire		·	
	\$ 0 \$ 50.00	\$ 28.00	
Acc Federal NY State Tax Filing Fees	\$ 50.00	\$ 0 \$ 1,603,11	
Credit Card Processing Fees	\$ 1,823.33	\$ 1,603.11	
Zoom Subscriptions	\$ 250.79	\$ 204.00	
GMM in Santa Fe, NM	\$ 10,437.79	\$ 500.00	
Travel	\$ 0	\$ 0	
Sales Office	Suspended	Suspended	
Insurance	\$ 396.00	\$ 396.00	
Printing and Copying	\$ 1,721.32	\$ 0	
Reimbursement	\$ 84.00	\$ 0	
Charitable Donations	\$ 0	\$ 0	
Website	\$ 71.96	\$ 239.88	
Accounting Fees	\$ 6,500.00	\$ 4,000.00	
Total Expenses	\$ 52,831.78	\$ 37,521.96	
Net income (Loss)	\$ (3,613.37)	\$ 21,003.58	
Beginning Balance	2024	2023	
Vanguard Bond Fund Index (restricted)	\$157,818.60	\$149,304.36	
BOA Checking Account (unrestricted)	\$ 50,495.44	\$ 41,086.26	
Paypal (unrestricted)	\$ 6,753.15	\$ 3,636.99	
Total	\$ 215,031.19	\$ 194,027.61	
Ending Balance	2024	2023	
Vanguard Bond Fund Index (restricted)	\$ 154,218.10	\$ 157,818.60	
BOA Checking Account (unrestricted)	\$ 48,196.32	\$ 50,459.44	
Paypal (unrestricted)	\$ 9,003.40	\$ 6,753.15	
Total	\$ 211,417.82	\$ 215,031.19	



Report from the Secretary Sally Keil

Board meetings for the American Branch of the Richard III Society are held every 2 months via Zoom. Minutes for each meeting are taken by the Secretary and distributed to the Board for review. At the following Board meeting the minutes are accepted by the Board or, if errors were made, accepted after the correction of any errors. All final Board Minutes are uploaded to the American Branch's website under 'Governance Documents' and are available for all members to review. These procedures were faithfully followed in the 2023-2024 period.

Report from Research Officer Dr Compton Reeves

I attended all Board meetings and provided institutional history and guidance based on my years of service with the Branch. I also plan to have the American Branch act as a sponsor for a session of papers given at the International Congress of Medieval Studies in Kalamazoo, Michigan.

Report from Editors Joan Szechtman and Tara Kolden

From Joan Szechtman, Outgoing Editor

I took over the position of editor for American Branch publications in 2011 when our previous editor died, leaving no documentation on the publishing, printing, and non-profit distribution through the US mail. At the time, a board member tapped me and after some thought I agreed. Fortunately, I knew what had to be done technically to publish, print, and mail the Ricardian Registers

Fast forward to 2023 when I realized that if something happened to me where I could no longer meet my obligations as the American Branch editor, that there was no one who could take over. I asked Wayne Ingalls, membership chair, to send an email blast for this position to which Tara Kolden responded. Over the past ten or so months, we have been working together over Zoom. Tara now has full responsibility for our publications.

From Tara Kolden, Incoming Editor

Joan has been an invaluable resource as I ramp up my skills as the American Branch editor. We've worked together to record a number of tutorial videos from



our Zoom calls—these have been a huge help to me, and hopefully can serve as a resource for anyone else joining the editorial team in future.

I've enjoyed the challenge of sourcing content for our publications, tapping both American Branch members and contributors farther afield (our latest Register includes a contribution all the way from Monaco!). We've also switched from black and white interior printing to full color for the Register, a relatively low-cost change that greatly enhances the content and will be especially valuable as we share more details about the Edward IV Roll with members.

For the Chronicle, I'm looking forward to soliciting more reviews of online content such as academic or educational YouTube videos and podcasts (as an example, Joan reviewed a relevant Medieval episode of YouTube's Tasting History for the last issue), something that I think has broad appeal for our members and might tie into our online and social media presence.

A new printer for the Register was secured following the departure of Baker & Taylor from the industry. PrintingCenterUSA, in Montana, is being used to produce the journals, which they ship to our distributor SunGraphics. We, and the Board, are monitoring PrintingCenterUSA for quality, customer service, and cost-effectiveness.

Report from Webmaster Cheryl Greer

Since unveiling the new American Branch website in 2022, we have had positive reviews from our peers and increased user engagement. In that time, I have managed all the website and IT needs for the Branch myself so I'm currently seeking an "apprentice" to assist with site management. Previous experience with website Content Management Systems (Wordpress, Square Space, etc.) is preferred but not absolutely necessary. Please email webmaster@r3.org if interested.

I won't bore you with a lengthy recitation of site statistics but will limit myself to a few highlights. In the 12-month period from Oct. 2023 to Oct. 2024, www.3.org had:

- 10,104 unique users (this is anyone who visits the site), of whom 9,899 were new
- Nearly 50,000 page views
- Our most-visited pages (apart from the Home page) are the "Timeline of the House of York" and "Meet Richard III" - We are an educational resource!



• 58% still view our site on desktop computers, and 37% on phones

Overall, our site visits declined by around 13% from the same period in 2022-2023, but I find this to be a reasonably positive metric. Considering the excessive bump in activity we gained in 2023 from the US buzz around "The Lost King" movie, I would have expected usage to decline more sharply.

One statistic that stands out to me is that the vast majority of our site's visitors are new. I'd like to take this opportunity to remind members that r3.org, though a public gateway into the world of Richard III, is also your website. We have many resources for members to enjoy, including exclusive access to current issues of The Ricardian Register, back issues of the Register dating to 1966, newsletters, a collection of our past Zoom lectures, and of course our lending library catalogs. Visit r3.org/for-members to get started! (Many members-only areas require a password. The current password can be obtained from membership@r3.org)

Report on Special Projects Fund from Susan Troxell

This fund, invested with Vanguard's Total Bond Market Index, was created in 2013 after the membership voted at the AGM to combine all large member donations, rather than track them in separate bank accounts which was expensive and time-consuming. The funds were invested with Vanguard in their "Total Bond Market Index" portfolio because of its low risk and steady-but-modest growth track record. The intent of these funds, as per the original donors, was to pay for special projects, restoration of artifacts, and educational initiatives like school essay competitions. The Board has discretion to use these funds to sponsor projects it deems suitable to our mission and the donors' intent.

In 2023, the Board approved a major new project in conjunction with Professor Emily Steiner at the University of Pennsylvania, Dot Porter of the SIMS institute for manuscript studies and digital humanities, and three PhD students - to transcribe, translate, and digitally map Free Library of Philadelphia MS Lewis E201 (aka the "Edward IV Roll"). Peer reviewers were retained and compensated for their time in double checking the students' work carefully. The project is in its very final stages of completion and should be available to the public in 2025 (hosted on the Free Library's website). It has attracted positive attention and



feedback. The Board views this project, which follows its earlier funding of E201's restoration, as one the great achievements of the American Branch.

Report on Schallek Fund from Susan Troxell

The Maryloo Spooner Schallek legacy, originally in the amount of \$1,300,000 but now valued at \$1,900,000, was transferred to the Medieval Academy of America in 2006 to administer and support the Schallek Fellowship & Awards Program. It is invested in a balanced portfolio managed by UBS Financial Services. Income generated from the investment up to 4% total fund value is used to fund the fellowship and awards, and to pay MAA's administrative fees (up to 0.5% fund value) and costs. Since inception, over \$800,000 has been distributed to graduate students to support their research. This is a significant achievement for the American Branch, of which we can be very proud.

The winners of the \$30,000 fellowships in 2023 and 2024 were Amy Juarez at the University of California-Riverside and Morgan McMinn, at West Virginia University. Amy's dissertation is entitled "The Poetics of Embodied Architecture in Medieval and Early Modern Europe"; and Morgan's is called "Community: A Study of the Interpersonal Relationships of Monks and Nuns in the Late Medieval Diocese of Lincoln". In addition to these two fellowships, awards of \$2,000 each were given to 9 graduate students doing research in areas pertinent to late medieval Britain. They are listed on our website, along with all past winners, at https://r3.org/schallek/

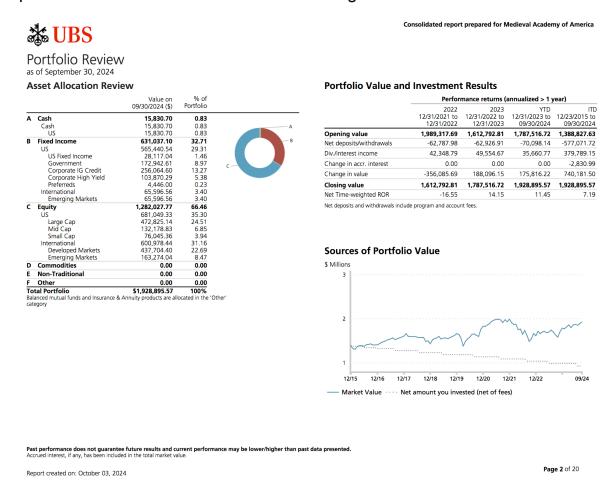
In 2024, the Board voted to increase the annual fellowship from \$30,000 to \$40,000 and the five annual research awards from \$2,000 to \$5,000, for a total payout of \$65,000 per year. This was the first increase in the endowment's history and was met with great enthusiasm by the MAA. It is believed that these increases will attract a larger pool of candidates, especially for the smaller research awards.

The Board believes the MAA is doing a good job managing the program and funds: it advertises the program in the <u>Speculum</u> magazine and elsewhere on social media, it puts together the expert review committee, and it promotes the



winners' names and research topics. The American Branch is mentioned throughout the process. This is a win-win for us. With this history in mind, the Board voted to extend the MAA's agreement with the American Branch for another 5 years (2025-2030).

Report from Schallek Endowment Fund Manager:



Report by the Fiction Librarian Pauline Calkin

Despite efforts to encourage members to avail themselves of this free resource by publishing reviews of books in the library, only three members have borrowed books since the last GMM in 2022. Due to the lack of member requests as well as space limitations, the librarian has been reluctant to add books to the collection. Several books by Margaret Frazer were added simply because your



librarian became hooked on the series and these titles were not in the library nor available as ebooks. Your librarian welcomes any suggestions to promote members' interest.

Eleven books were added to the fiction library in 2023:

The Colour of Bone, by Toni Mount

The Lost Prince, by Ethan Bale

Wheel of Fortune by C.F. Dunn was donated by the author

The Squire's Tale; The Bastard's Tale; The Widow's Tale; The Sempster' Tale;

The Traitor's Tale; and, A Play of Treachery, all by Margaret Frazer with the latter being donated by Helena Wright.

Kathy H.D. Kingsbury donated two books: The Ballad of Crookback & Shakespeare, a play by Clive Greenwood as well as a Manga graphic novel of Shakespeare's Richard III, by Richard Appigrnanesi.

Five books have been added to the library in 2024:

The Colour of Sin by Toni Mount

The Traitor's Son by Wendy John

The Sun Ascendant is the second novel in C.F. Dunn's Tarnished Crown series.

The King's Mother by Annie Garthwaite

The Last Winter Rose by Caitlin Sumner

Report by Non-Fiction Librarian Susan Troxell

I became Research Librarian in 2015, and it has grown from 550 titles to more than 600 in 2024. Unfortunately, despite my attempts to bring members' attention to our non-fiction library, I continue to receive a low number of borrowing requests (5-6 requests per year). Because of that, as well as limited storage space in my house, I have to be as judicious as possible in making new acquisitions for our library.

Books added in 2023-24:

Jeffrey R. Wilson, "Richard III's Bodies from Medieval England to Modernity - Shakespeare and Disability History" (2022) (donated by publisher)



Arthur Kincaid, "The History of King Richard the Third by Sir George Buc, Master of the Revels" (2023)

Philippa Langley, "The Princes in the Tower: Solving History's Greatest Cold Case" (Pegasus, 2023)

Marie Barnfield, "Itinerary of Richard, Duke of Gloucester, 1452-1483" (Richard III Society, 2024)

Radulescu & Kennedy (eds.), "Broken Lines: Genealogical Literature in Medieval Britain and France" (Brepols, 2008) (donated by Susan Troxell)

Please note the following New Policies adopted in the past 2 years:

GIFT POLICY FOR RICHARD III SOCIETY - AMERICAN BRANCH

The American Branch is an all-volunteer organization that is supported through annual membership dues. Donations, bequests, and beneficiary designations are welcomed for the following:

- Cash and its equivalents
- Books please contact our librarians first, as books are maintained by volunteers in their homes, https://r3.org/contact/
- Marketable and unrestricted securities

All cash gifts and distributions go into our general operating fund unless the donor has requested and received permission from the Board of Directors for a special use that can be reasonably implemented in a reasonable amount of time.

Regretfully, we are unable to accept the following:

- Antique or Collectable items
- Real estate
- Office hardware or equipment like computers
- Tangible personal property or archives



UK SAFEGUARDING AND CODE OF CONDUCT

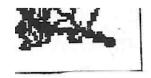
As a requirement of our status as an affiliate of the UK Richard III Society, we adopted their Code of Conduct and Safeguarding policies. Both can be found on our website, in the For Members/Legal Documents (password required).

Report from Chapters Coordinator Liz Bateman

- There are eight chapters within the American Branch of the Richard III Society.

 - Michigan Area: Chairman Larry Irwin
 - Northwest: Chairman Jim Mitchell
 - New York Metro Area: Chairman Maria Elena Torres
 - ▼ Tidewater, VA: Chairman Liz Bateman
- The Florida R3 Chapter meets annually at the English Pub on International Drive in Orlando, Florida each August 22nd to commemorate Richard's fall in the Battle of Bosworth. I recently became a Facebook Friend of King Charles and sent him a message urging him to consider honoring King Richard by interning his recently discovered remains alongside his wife, Anne Neville, in Westminster. I haven't received a royal reply but perhaps the Society can petition King Charles formally. Cordially, Dr. William Francis Gouveia, Florida Branch
- The <u>Northwest Chapter</u> has gone into suspension, but anytime more members join the chapter they are willing to become active again.
- The <u>Michigan Chapter</u> meets regularly and has a newsletter. Attached is the first paragraph of their newsletter which went on to discuss the Coronation of Henry IV:





The Ragged Staff





July Meeting

The July meeting of the Richard III Society, Michigan Chapter, was our annual Coronation Banquet, on July 7, 2024, at The Three Cats Café. Present attending were Rose Wiggle, Eva Veller, Judy Polcyn, Gordon Harwood-Stamper, Ken Gleason, Catherine Zhukov, Linda Peecher, Charles Fickeau and also Larry Irwin. We discussed the menus for the past English coronations, including Coronation Chicken for the 1953 coronation of Elizabeth II and Coronation Quiche for the coronation of Charles III.

 New York-Metro Area: Many members of our chapter enjoyed Sally Keil's lecture on Medieval Marriage.

• Tidewater Chapter

- Since our membership is scattered between Richmond, VA; Washington D.C.; Harpers Ferry; Fairfax, VA; Maryland; and New Jersey, it is very difficult to meet in person, so we decided to use the ZOOM format.
- Our first Zoom meeting was an introduction and we decided that we would have a book discussion on Matt Lewis's book <u>The Survival of Princes in Tower: Murder, Mystery and Myth</u> What made it all the more fun was that Matt Lewis joined our Zoom discussion. So nice of him!
- The next book we read a few months later was Philippa Langley's book about her Missing Princes Project The Princes in the Tower:

 Solving History's Greatest Cold Case and the findings which indicated that the Princes actually likely survived beyond the death of King Richard at Bosworth. One of our members took part in the Missing Princes Project in the U.S. led by Sally Keil.
- Sally Keil also presented a lecture on Medieval Marriage which was well attended by our chapter and very informative.
- Our longtime Treasurer, George Usher, stepped down and Maureen Chelak took over from New Jersey! We decided to collect minimal dues and decided to use some dues to reimburse any members who signed up to watch the Smithsonian lecture on the Women of the Wars of the Roses. In the future, we could defray some of the cost of a field trip such as visiting a medieval



- manor house which was literally shipped from England to Richmond, VA and reassembled: https://www.agecrofthall.org/ Also, since one of our members works at Harper's Ferry as a naturalist architect, we would like to have him lead us on a tour of the area and what he does.
- ☼ Currently, we are reading the book highlighted in the June Ricardian Bulletin The Tudor Deception and will have a meeting and discussion on November 10th using the American Branch Zoom platform which was generously offered by Susan Troxell for periodic use.
- In the spring, we are talking about reading <u>Cecily</u> and then moving on to <u>The King's Mother</u> both by Annie Garthwaite.
- **Arizona Chapter**: This chapter hasn't met since 2007, but should anyone want to join the Arizona Chapter, Marion Low will be pleased to help them become members.

• Illinois Chapter

■ "The Illinois Chapter had three meetings this year so far, with our holiday party scheduled for this December. We have fewer members now and have been discussing changes in the organization of the chapter. At our March meeting, we talked over possible changes, future plans, and the GMM. One member told us about a production of Richard III that had a female bilateral amputee as Richard. She said it was a dark comedy and quite unusual. At our June meeting we watched the Secrets of the Dead episode about Richard III with Philippa Langley. We were quite interested in her findings and the possibility that the princes had been alive after Richard was killed. At our September meeting we watched another Secrets of the Dead episode "Resurrecting Richard". Though it was not a current episode some members had not seen the show. Some of us had been in Denver and saw Dominic Smee there. However, this year possibly only one or two people might go to the GMM, so we decided to watch the show for background for the GMM and let those members who had not seen the show learn about him. We also planned our upcoming December holiday party."



- **➡** Janice Weiner, Chair of the Illinois Chapter
- The Rocky Mountain Chapter is busy making this year's GMM memorable, and hopefully the Society will have a great turnout in the beautiful Southwest city of Santa Fe, NM.