



**REPORT TO THE GENERAL MEMBERSHIP MEETING
OCTOBER 2026
NEW HAVEN, CT**

Report of Chair (Susan Troxell)

I chaired all the meetings of the Board of Directors and attended, as ex officio member, many of the committee meetings of our volunteers. It has been an honor to serve as your chair and I truly believe the future looks very promising for the American Branch.

A brief summary of what the Branch accomplished in 2025-26:

- Four high quality, full-color issues of the *Ricardian Register*, featuring original research and a full transcription/translation of the Edward IV Roll (Lewis E201), a multi-part series of articles on Juana of Castile, an article about Thomas More's father John, and book reviews by our team of reviewers.
- Ten educational Zoom talks, on subjects ranging from the battles of Towton and Wakefield, to medieval Christmas, the execution of Hastings, Richard III's Parliament, and North America's collections of medieval books - given by recognized experts in their fields including Annette Carson, Lisa Fagin Davis, Matt Lewis, Toni Mount, David Grummitt, and others. We also invited Annie Garthwaite to talk about her fictional novels about Cecily duchess of York.
- Four social Zoom events when members discussed topics of interest to them and reminisce about the 2015 reburial of Richard III, including the rollout of our new American Branch Movie Club.
- Improved the Board's ability to provide sound leadership by retaining a financial adviser, adopting policies and guidelines for making grants and honoraria, and creating a shared Google Workspace for Branch directors, officers, and committee members.
- Received a record-breaking level of donations and bequests, which enable us to keep Branch dues at existing prices, to host an attractive GMM, and to fund worthy projects like the Voice For Richard Project and the translation of Oxford Brasenose MS 91.

Like many organizations of our size, we also had some challenges and expect some headwinds in the next 2-5 years:

- Very late delivery, or no delivery at all, of Society publications.
- Decline in membership numbers—paralleling the same decline in membership of the UK Richard III Society.
- Escalating costs of goods and services.
- Difficulty finding volunteers to serve as Officers of Branch (technical skills).
- Difficulty finding content for newsletter and research journals.
- Non-use of Branch libraries.
- New requirement of having an Independent Financial Review to satisfy NY state charity law.

As chair, I am also very pleased to announce that the American Branch has used its restricted resources thoughtfully and has funded the following programs and projects in 2025-26:

- Sponsorship of \$40,000 fellowships to 2 fulltime PhD candidates in Medieval Studies and \$5,000 research awards to 10 graduate students, under the Schallek Fellowship and Awards Program, administered by the Medieval Academy of America. Winners' names and research topics were announced on our website (<https://r3.org/schallek/>) and in our Branch newsletters.
- Out of the Branch's Special Project Fund, a grant of \$5,000 was made to support the completion of Phase III of the Voice For Richard III Project, led by Yvonne Morley-Chisolm, which will premiere a video showing a digital avatar of Richard reading a letter he wrote to mother Cecily in Middle English. Yvonne agreed to give a free talk to our members with the new video, when it is completed in 2027.
- Out of our new Peggy Dolan Research Fund, a grant of £15,000 (roughly \$20,000) was made to the Yorkist History Trust, for the publication of a first-ever critical edition of Oxford Brasenose College MS 91, a royal genealogy of Henry VI made in the mid-15th century. Shaun Tyas/Paul Watkins Publishing in the UK has agreed to publish the book which will also have full-color reproductions, transcriptions, translations, and historical context for the genealogy. Scholars from Oxford University have been recruited for the project.

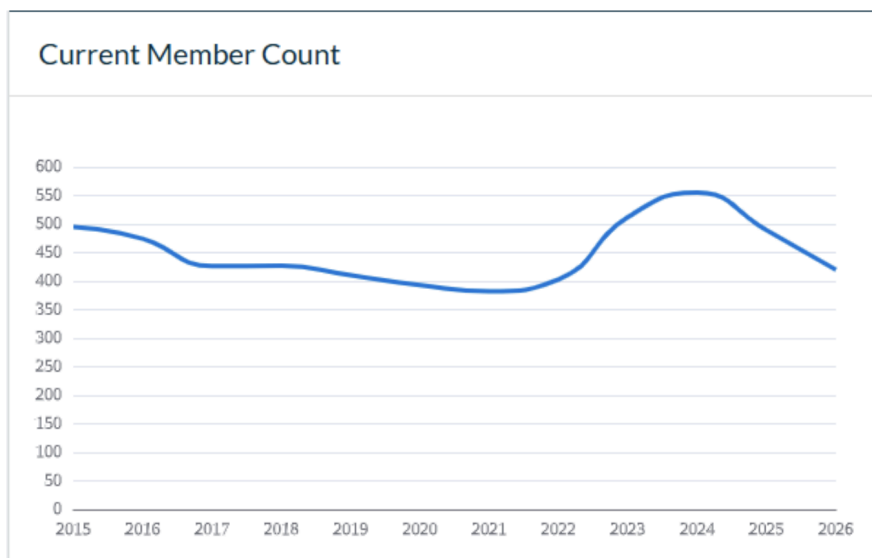
Report of Acting Vice Chair (Maureen Chelak)

As Vice Chair of the American Branch I am responsible for developing the agendas for the bi-monthly board meetings. I spearheaded the branch's sale of author (and member) Annette Carson's recent book Richard III: Unspun; was instrumental in the development of the branch's membership survey which was recently sent out in order to gauge membership satisfaction with the activities and benefits of the Society; and have acted to coordinate upcoming Zoom talks for

the 2027 term. I have also actively participated in discussions regarding funds the Society has received from outside sources, as well as discussions to formulate procedures for accepting and approving research grants made by the American Branch. As a primary member of the Board, I review all motions set before the board and am actively involved in these discussions and approvals. As a side responsibility, I participated in the review of online material for historical figures from the period of Richard III in an effort to ensure published material was both complete and factual.

Report of Membership Chair (Wayne Ingalls)

The American Branch reached our 10+ year membership high of 555 members in 2024. Our current membership total is 420 members, reflecting a similar downturn in membership as the UK Richard III Society over the past 2 years. Our membership today is approximately 75% of what it was in 2024. Our assessment is that the sharp increase in membership from 2022-2024 was due to renewed interest in King Richard III due to Philippa Langley's *The Lost King* movie, the publication of her book *The Princes in the Tower: How History's Greatest Cold Case Was Solved*, and the corresponding *Secrets of the Dead* episode *The Princes in the Tower* (s23 e03). In the face of rising costs, we seek to retain our members by providing exceptional value and consistent engagement. Corresponding with our membership is one of my favorite aspects of serving as your Membership Chair.



Treasurer's Report (Deborah Kaback)

<u>INCOME:</u>	<u>1/23-12/24 (8 Qs)</u>	<u>1/25-6/26 (6 Qs)</u>
Dues from Members	\$ 57,442	\$ 47,000
Cash Donations	\$ 34,529	\$ 25,000
Program Service Fees (GMM)	\$ 4,770	\$ 9,000
Dividends (unrealized income)	\$ 10,455	\$ 9,500
TOTAL INCOME	\$107,196	\$ 88,500 as of 7/1/26

<u>EXPENSES:</u>	<u>1/23-12/24 (8 Qs)</u>	<u>1/25-6/26 (6 Qs)</u>
Dues payable to UK	\$ 33,456	\$ 21,000
Direct mailings UK pubs	\$ 16,169	\$ 4,900 (digital introduced)
US pubs printing/mailing	\$ 5,472	\$ 7,800 (3 of 4 issues)
Bookkeeping/Tax Prep	\$ 10,500	\$ 5,300
D&O Insurance	\$ 792	\$ 396
Neon/Credit Card Process	\$ 3,299	\$ 3,700
Cost of GMM	\$ 12,658	\$ 14,000 (estimated)
Special Projects	\$ 2,375	\$ 5,000
Fiction Library	\$ 259	\$ 0
Non-fiction Library	\$ 118	\$ 0
Award plaques etc.	\$ 0	\$ 0
Website maintenance	\$ 239	\$ 0
Tax filing fees to NYS	\$ 100	\$ 50
Bank Wire fees	\$ 200	\$ 0
Publicity	\$ 400	\$ 0
Zoom subscription	\$ 400	\$ 500
TOTAL EXPENSE	\$84,062	\$62,146 as of 7/1/26

<u>ACCOUNTS:</u>	<u>As of 12/24</u>	<u>As of 7/1/26</u>
Checking (Operating)	\$ 48,196	\$ 59,290
Paypal (Operating)	\$ 9,003	\$ 12,457
Vanguard (Restricted)	\$154,218	\$ 161,474
Ameriprise (Restricted)	NA	\$ 327,310

Peggy Dolan Bequest & Formation of Peggy Dolan Research Fund

In 2025, the Board was made aware that the American Branch was named as a residual beneficiary in the Last Will and Testament of Peggy Ann Dolan, who passed away in February 2024. In 2012, Peggy had been recognized by then-Membership Chair Wayne Ingalls as being one of the Branch's longest members (over 30 years). During the probate of her estate, the American Branch received a distribution of \$327,310, which the Board has invested conservatively and with the expectation that the Branch should try to aim for a 5-6% annual return on those investments. That would generate \$16,350 in annual revenue from which the Board could award grants to research projects and pay for the Branch's own research journal, the *Ricardian Register*. Peggy Dolan's will made no restriction or condition on her bequest except that the funds be used "for research" generally. The Branch will make a public announcement of the formation of the Peggy Dolan Research Fund.

Secretary's Report (Liz Bateman)

Board meetings for the directors of 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. Board Minutes are uploaded to the American Branch's website under 'Governance Documents' and are available for all members to review. These procedures were dutifully followed in 2025 and 2026. Occasionally, other Board meetings fall between the bimonthly meetings. For example, on October 28, 2025, there was a meeting with Yvonne Morley-Chisholm to discuss a grant to the Voice for Richard Project. More recently, the American Branch Board was asked to approve a £15,000 grant for the Yorkist History Trust. Graduate students will transcribe and translate a royal genealogy of King Henry VI and then publish a book. Based on a Grant Evaluation Worksheet, the Board unanimously approved the grant, which will be given in two stages. The American Branch would get credit in the book when it's finished; we would receive a gratis copy, and they would give a free talk to our membership.

With our GMM coming up at the end of October of this year, the Secretary has also helped in the planning stages and the purchase of items for use at the GMM.

The American Branch has received a generous bequest from the Estate of Peggy Dolan, and the Board has been involved in determining how best to invest and use the funds. The Secretary has been part of the Board decisions in this regard.

Webmaster's Report (Cheryl Greer)

Since our last GMM, usage of our website has remained steady, though we struggle to attract new users. The most significant recent upgrade has been the addition of the Events Calendar plugin, which creates more visually appealing and better indexed event listings. An added bonus is that the Events Calendar is user friendly, so that Branch volunteers can add and edit events without needing help from the webmaster! We hope you are enjoying it, and checking out our always-interesting slate of events at <https://r3.org/events>

I'm grateful for the support of Barry York and Susan Troxell in adding content to the site. Drop me a line at webmaster@r3.org with any comments or suggestions of things you'd like to see on the website!

Fiction Librarian's Report (Pauline Calkin)

Other than the reading editors of the Ricardian Register, one member borrowed a book from the fiction library in 2025, and so far this year only one other has borrowed a book. Accordingly, your librarian has been reluctant to add books to the collection.

The following books were added in the past 2 years:

The Colour of Darkness, Toni Mount, MadeGlobal Publishing, 2025.
The Pretender, Jo Harkin, Bloomsbury Circus, 2025,
The Solace of the Common People, Angela K. Smith, Leofrici, 2022
The Colour of Malice, Toni Mount, MadeGlobal Publishing, 2026
The Sprig of Broom, Barbara Williard, Jane Nissen Books, 2010

Research Librarian's Report (Susan Troxell)

Like the Fiction Library, usage of the Research Library has been negligible - with around 2 requests for books per year. Thirty years ago, there were routinely 5 requests per month! It seems that the cause of this reduction is the widespread availability of cheap used books, free online books, digital texts and e-readers. In terms of research, many resources are now available on-line. Due to decreased demand, I have been conservative in adding to this library. Added to the Research Library in the past 2 years:

D. Grummitt, The Wars of the Roses: War and Martial Culture in England (2025)
Loyalty Binds Me: Festschrift to Peter & Carolyn Hammond (2024)
Watts, The Wars of the Roses: A Medieval Civil War (2026)

Chapters Coordinator's Report (Liz Bateman)

There are three chapters that are regularly active: Tidewater, Florida, and Michigan. The Arizona and Illinois Chapters have disbanded; New York Metro has 34 or 35 members on paper, but has had difficulty in attracting enthusiasm for in-person gatherings. The Northwest Chapter has a mailing list of 15-20 people, but it's been a long time since the Chairman, Jim Mitchell, has heard from anyone, and he's thinking of moving to Florida. Rocky Mountain Chapter's Mary Miller and Dawn Schafer had tea with a descendant of Richard III's sister. Tidewater meets two or three times a year and discusses books or other general topics. Its next Zoom will be in early December. Michigan has 6-8 active members who meet 4 times a year, and the Chairman produces a newsletter called The Ragged Staff. The Florida Chapter meets once a year at an English pub on August 22nd to commemorate the Battle of Bosworth.

The big question at this point is whether local chapters are viable. The Tidewater Chapter is scattered from New Jersey, Maryland, Delaware, Virginia, North Carolina, and one member lives in California, but has not attended a meeting. It's impossible to meet in person unless we all attend the GMM.