



# Annual Report

July 2022–June 2023

Massachusetts  
Historical Society  
*Founded 1791*

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## LOCATION

1154 Boylston Street  
Boston, MA 02215

## CONTACT

Tel: 617.536.1608  
Fax: 617.859.0074

## VISITOR INFORMATION

Exhibition Galleries and Library Hours

Monday and Wednesday through Friday:  
9:30 AM to 4:45 PM

Tuesday: 9:30 AM to 7:45 PM

Saturday: 9:30 AM to 3:00 PM

The last admission for visitors is 45  
minutes prior to closing.

## SOCIAL AND WEB

   @MHS1791

 @MassachusettsHistoricalSociety

[www.masshist.org](http://www.masshist.org)



Cover image: Cotting School tricycle race, unknown photographer, 1943, Cotting School records. Learn more about this collection on page 8. Above: Wandering Boston's Little Syria, photo by Carol Knauff, April 2023.



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*Our mission is to promote understanding of the history of Massachusetts and the nation by collecting and communicating materials and resources that foster historical knowledge.*

# FY 2023 BY THE NUMBERS

JULY 1, 2022, THROUGH JUNE 30, 2023

**230** LINEAR FEET OF MANUSCRIPT MATERIAL PROCESSED

**270** DAYS MHS READING ROOM OPEN (JULY 1, 2022, THROUGH JUNE 30, 2023)

**59** FELLOWSHIPS AWARDED (INCLUDING MHS-NEH LONG-TERM, MHS SHORT-TERM, NERFC, TEACHER, AND STUDENT)

**6,244** COLLECTION ITEMS CIRCULATED (DOES NOT INCLUDE SELF-SERVICE MATERIALS, MICROFILMED COLLECTIONS, OR USE OF COLLECTION ITEMS BY MHS STAFF)

**8,294** ATTENDEES (AT 61 PROGRAMS, 30 SEMINARS, 3 SPECIAL EVENTS, AND 1 CONFERENCE)

**1** AWARD-WINNING PROGRAMMING SERIES

**2,440** RESEARCH VISITS (705 INDIVIDUAL RESEARCHERS FROM 35 STATES AND 13 COUNTRIES OUTSIDE THE US)

**5,100** REFERENCE-QUALITY REPRODUCTIONS DELIVERED

**4,000+** STUDENTS FROM 51 SCHOOLS PARTICIPATED IN NATIONAL HISTORY DAY IN MASSACHUSETTS

# Year in Review

## Increasing impact with a sharpened focus

FY2023 was a year of transformation, introspection, and focus for the MHS. Over the course of the year, we defined our priorities, harnessed the power of a sharpened focus, and outlined a three-year goal-oriented plan to be productive, dynamic, and innovative. Learn more on pages 2-3.

We are delighted to present our FY2023 Annual Report. Not only does it mark another remarkable year in our history; it also celebrates the expertise of our staff and their dedication to make accessible our ever-growing collection.

Thanks to the generous support of our community near and far, the MHS continues to be a leader in public history, creating a better world by sharing the enduring stories from our past and making historical knowledge accessible to all. In FY2023, we broadened access to our collection by digitizing more than 12,000-page images, welcomed 705 individual researchers, and supported 59 fellowships for cutting-edge research in American history. Our library supported researchers from several prominent historical sites in Massachusetts doing research to revise the interpretation and presentation of enslaved people and people of color related to the early history of the sites. A research team from the Nipmuc Nation visited to do research as part of a larger project to document the Indigenous stewardship of the northeast.

In July 2022, we hosted 100 attendees at the Conrad E. Wright Conference titled *Underrepresented Voices of the American Revolution*. The conference brought together scholars to explore the broad themes associated with historic individuals or groups not traditionally considered in discussing the American Revolutionary Era.

As well, we produced an engaging array of programming including

- *The Revolutionary: Samuel Adams* with Stacy Schiff in conversation with Sara Georgini
- *Teaching White Supremacy: America's Democratic Ordeal and the Forging of Our National Identity* with Donald Yacovone in conversation with Henry Louis Gates, Jr.
- *Lydia Maria Child: A Radical American Life* with Lydia Moland in conversation with Megan Marshall
- *Parlor Politics: David Rubenstein Interviews Catherine Allgor* with David Rubenstein in conversation with Catherine Allgor

What's more, we

- Hosted *MassArt at 150: Tradition and Innovation*, an exhibition in partnership with MassArt and the Handel + Haydn Society.
- Partnered with The Little Syria project on a program and exhibit to uncover a neighborhood that is nearly invisible today.

Sharing this wonderfully diverse continuum of experiences is only possible with the generosity of our friends and supporters. We are grateful for these gifts and the impact they have.



R. Newcomb Stillwell  
Chair, Board of Trustees



Catherine Allgor  
President

# MHS Three-Year Strategy

## A Sharpened Focus

As the first historical society in the nation and a respected leader in public history, the MHS has collected, preserved, and shared materials and resources that foster historical knowledge for 232 years. As the Commonwealth and the nation have grown and evolved, so has the MHS. And we continue to do so. A majority of FY2023 was spent discussing our priorities, refining our goals, and thinking about the future. With guidance from our Trustees, Advisors, Members, and staff, we have sharpened our focus and determined specific goals for the next three years.

### Strategically add to and strengthen the collection to reflect diverse voices and prepare for the scholarship of the future

- We will actively collect the history of all communities that make up Massachusetts.
- We will increase the reach of the collection.
- We will identify and collaborate with other archival repositories collecting for diversity.

### Promote the teaching of history and civics across the K-12 population in Massachusetts

- We will refine the scope of National History Day to reach more students across Massachusetts.
- We will enhance access to the Society's primary source materials by expanding the resources and tools available to K-12 students and teachers.
- We will actively seek partners to leverage our education efforts to maximize our impact.

### Increase access to the collection and refocus publications

- We will expand the number of digital projects and online resources available to researchers, teachers and students, and the general public.
- We will reduce the backlog of materials that need to be processed.

- We will focus on the selection, transcription, and contextualization of our collection through the publication of documentary editions.

### Promote our researchers and fellows and the historical expertise they provide

- We will grow the number of fellowships offered by the MHS with a particular emphasis on public history and new scholarship.

### Increase the visibility of the MHS to raise its profile

- We will develop and execute on a messaging and funding strategy to dramatically increase our visibility in Boston, throughout Massachusetts, and across the nation.
- We will develop new projects to highlight our historical expertise.
- We will produce public programs that are aligned with overall strategy.

### Deepen and broaden the Society's financial support

- We will develop a culture of philanthropy across the MHS and with volunteer leadership.
- We will devise and implement strategies that will increase financial resources and decrease dependence on the endowment.

### Increase the sustainability of the MHS

- We will invest in our world-class staff by increasing opportunities for professional development.
- We will enhance our physical and technological security.
- We will plan for future facility needs.

By bringing this sharpened strategic focus to its offerings, the MHS will position itself for continued success and growth in the future.

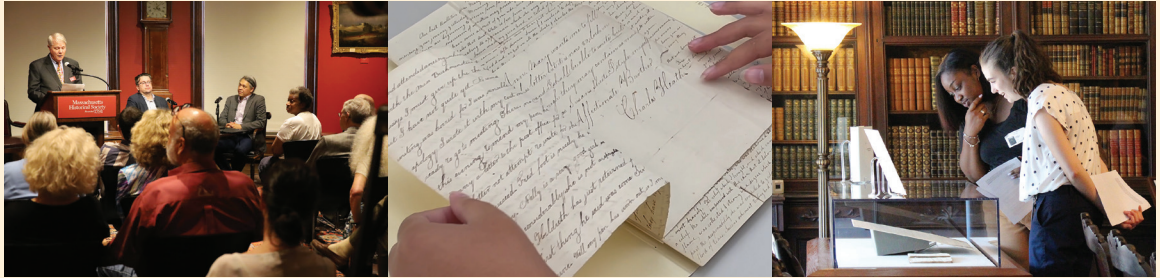
## Our Mission

To promote understanding of the history of Massachusetts and the nation by collecting and communicating materials and resources that foster historical knowledge.

## Our Vision

A world where historical understanding is the cornerstone of a healthy democracy.

To realize this vision, we strive to make our collections accessible to all. We aim to make a difference across Massachusetts, and we connect with people in imaginative and intellectual ways. As a center for learning and engagement, we enhance the understanding of our nation's past and its connection to the present. We provide a forum for discussion and debate. We will become a resource in the Boston area to serve multiple communities from the local to the international.



## Our Values

We believe that historical understanding is critical to creating a better world. We welcome everyone to draw upon our collections to encourage a richer understanding of our past. We use our resources to educate, connect, and inspire in order to build historical empathy, foster civic responsibility, and generate an awareness of and respect for our shared humanity.

Our work will be guided and informed by our beliefs and commitments to:

### Providing Access

- We make our collections accessible to all.
- We encourage everyone to examine primary source materials, make their own observations and interpretations, and share their ideas among many audiences.
- We connect with people in imaginative and intellectual ways.
- We support the value of historical knowledge and evidence for civic discourse and discussion.

### Embracing Diversity

- We encourage healthy debate and respect differences of opinion.
- We serve multiple and diverse communities from the local to the international.
- We endeavor to document all aspects of history with a connection to Massachusetts.

### Demonstrating Quality

- We collect strategically and act as responsible stewards.
- We pursue excellence across all aspects of our work.
- We lead through best practices, innovation, and example.

# Impact

# Harness History to Create Change

The MHS Fund forwards our mission by providing essential resources so that we can continue to collect, preserve, and share the treasures that promote the study of American history. The MHS Fund makes it possible for us to offer culturally relevant exhibitions, educational and enriching programs, public access to rare primary sources, and special care of our world-class collection. Keep reading for examples of the great work we accomplished in FY2023.

## Provide access so people can discover from anywhere

MHS staff created over 12,000 digital images of collection items for the MHS website. We processed 230 linear feet of manuscripts, which are now available for research. We added more than 800 records to our online catalog for numismatic items (medals, coins, and badges), providing online access for the first time to this interesting, yet little known part of our collection.



## Bring treasures and forgotten stories to listeners everywhere

We produced nine episodes of season 2 of our podcast, *The Object of History*. Listeners tuned in to uncover stories and research related to wax seals, living like John Quincy Adams, the mystery about roots allegedly from the original Liberty Tree, and illuminated manuscripts in our collection.

## Support K-12 teachers and students through National History Day

More than 4,000 students across the Commonwealth participated in National History Day in Massachusetts. Thanks to the MHS Fund, we have the resources to support students and teachers as the official state sponsor of NHD.





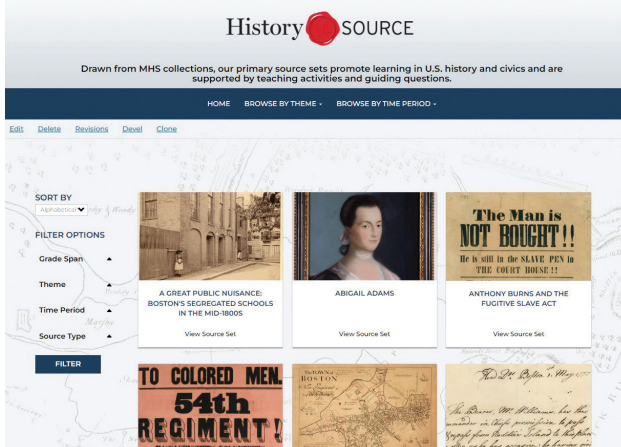
## Make connections through exhibitions and programming

We connect our community with enlightening programs that combine cutting-edge historical research with an understanding of how the past impacts our future. From local LGBTQ+ history to Boston's Little Syria neighborhood, our programs brought us together and celebrated the diverse cultures of Massachusetts.



## Enrich history and civics education in K-12 classrooms

We provide workshops, free digital resources, and more to support K-12 teachers. We launched [www.HistorySource.org](http://www.HistorySource.org), a free collection of digitized primary sources and lesson plans. Teachers can bring the highest quality of education to students with lessons that engage curiosity and promote critical thinking. We will continue to add to the 12 initial source sets on the site.



## Disability and the American Past series wins AASLH award

In February and March 2023, the MHS hosted a series of programs and a workshop to look at the field of disability history, investigate some major research areas in the field, and examine new, emerging scholarship. Through panel discussions and workshops, speakers from around the country provided a multi-perspective examination of disability in the American past.

The series received an Award of Excellence as part of the American Association for State and Local History (AASLH) Leadership in History Awards, the most prestigious recognition for achievement in the preservation of state and local history. The winners represent the best in the field and provide leadership for the future of state and local history.



Programs in the series included

*Disappeared Disabilities* with Beth Linker, University of Pennsylvania; Mara Mills, New York University; Leroy Moore, Krip-Hop Nation; and Ola Ojewumi, Project ASCEND.

*Failures in Intersectionality* with Keith Jones, SoulTouchin' Experiences; Susan Burch, Middlebury College; Anita Cameron, Not Dead Yet; and Octavian Robinson, Gallaudet University.

*Teaching the U.S. Disability Rights Movement* in partnership with Emerging America.

*Intro to Disability Justice* with Ellice Patterson, Abilities Dance; Jorge Matos Valldejuli, Hostos Community College at the City University of New York; Britney Wilson, New York Law School; and Jessica Cowing, The College of Wooster.

*Disability Activism in Massachusetts & Nationwide* with Colin Killick, Disability Policy Consortium; Cheryl Cumings, Our Space, Our Place, Inc.; Maria Palacios, Sins Invalid; and Lydia X. Z. Brown, Autistic People of Color Fund.

# Why the MHS?

## Meet Robin Pierson



*MHS Trustee Dr. Richard N. Pierson III shares his thoughts on the importance of history and why he is involved with the MHS.*

### How did you become involved with the MHS?

When we lived in Baltimore, we became friends with MHS President Emeritus Dennis Fiori, then director of the Maryland Historical Society. Though he left Maryland to “come home” to his “dream job” at the MHS, we kept in touch through holiday cards and occasional chance encounters. Then our daughters rowed against each other in college, and on various river banks up and down the northeastern seaboard I heard snippets from Dennis about the MHS and how it was weathering the 2008 financial crisis.

After we moved back to the Boston area in 2017, we were introduced to MHS’s public programs. I also learned of the involvement of several close friends and a few family members with the MHS. They shared with me their passion for the place, its people, and its core mission. We enthusiastically joined as Members and supporters. Since then, we have recruited friends and family to attend evening events, and to join as Members.

As an educator who cares about civics and history, I welcomed the invitation to serve as a judge for National History Day in Massachusetts (NHD). Through the tumult of the last decade, the fundamental importance of teaching our children how to think critically—to discern and contextualize facts—and to engage in historical analysis and civil dialogue came into clear focus for me. As such, I am working with MHS staff to partner with several of our many local institutions of higher learning to strengthen our existing NHD programs, and expand their reach into new schools, in and beyond Boston.

Finally, through our faith community, Christ Church Cambridge, I made a connection with the descendants of Darby Vassal, who is interred under our sanctuary. The Lloyd family and other members of the Black community are working with Harvard through the Slavery Legacy History Coalition to better understand and tell the history of their community in Boston and New England. It seemed natural to bring them into conversation with MHS leadership. Where that conversation will lead none of us can know, but I am confident we will all benefit from it.

### What keeps you involved with the MHS?

Since childhood I have enjoyed learning about how things came to be the way they are, not only in my profession but in the world at large. The history of medicine over millennia and the evolution of scientific enquiry from the Enlightenment to our remarkable present are subjects that fascinate and engage me. Of particular relevance is the development of transplantation from a newsworthy adventure during my childhood to a lifesaving, nearly routine surgical discipline over the course of my own career. This is history come alive. I have had the privilege to know and work with many of the

principals in the transplant story, and in the evolution of cardiac surgery. For me, history is very much alive, and directly connected to the work I do.

Meanwhile, as a student of American Studies in college, I am very aware of the thematic strands that are woven by cycles of conflict and its resolution into the fabric of our complex current national reality. The more we all know of our history, and the more generally known and understood that history is among our citizens, the better our odds of becoming “that more perfect union” envisioned for us by our forefathers. Once again, that theme is personal: I am descended from very early European settlers in New England and the mid-Atlantic, primarily in New York City. From family lore I know a lot about who those people were, and what they accomplished, in business, in the arts and sciences, and in the public sphere. The lens of our present national conversations has changed my understanding of my ancestors’ contributions, mainly by enriching their context, and helping me appreciate other histories that have not previously been told or valued. I view MHS not only as a repository of precious artifacts but as a catalyst to enrich our understanding of who we are and where we came from, as an essential foundation for deciding where we might aspire to go, and then figuring out how to actually get there.

**Do you have a favorite item in the collection?**

My favorite item is John Collins Warren’s diary. In it, he offhandedly remarks on the first public demonstration of ether as a general anesthetic on October 16, 1846, in what is now known as the Ether Dome at Massachusetts General Hospital.

*Did an interesting operation at the Hospital this morning while the Patient was under the influence of Dr. Morton’s preparation to prevent pain—the Substance employed was Sulphuric Ether—*  
—John Collins Warren journal, October 16, 1846

**Why should readers care about the MHS?**

Understanding our past is critical to building a better future. Through its programs and resources, the MHS contributes to that understanding of history and touches many communities. I am proud to support the MHS and several of its key initiatives to understand our past.

## Become a Member

A tree stands strong due to its stable roots. Our Members are our roots keeping us secure and resilient.

Connected to history, our Members have access to an unparalleled collection, enriching events, special programming, and inclusion in the Annual Report. Members enjoy MEMBER WEEK each year as well as the annual holiday party.

Join by making an unrestricted, fully tax-deductible donation of \$250 or more to the MHS Fund.

Join today at  
[www.masshist.org/support/mhsfund](http://www.masshist.org/support/mhsfund).



**Questions?**

E-mail [membership@masshist.org](mailto:membership@masshist.org), call 617-646-0551, or scan the QR code.



The Massachusetts Historical Society is a 501(c)(3) exempt organization under IRS Code: EIN 04-2108374

# Acquisition Highlight

## Cotting School Records

On March 15, 2023, MHS Senior Vice President for Collections and Content Development Brenda Lawson joined together with Cotting School President Bridget Irish in welcoming guests at an event to celebrate the partnership of the two organizations to preserve historical materials from the school's rich history.

Coinciding with the 130th anniversary of the school's founding, the deposit of 45 linear feet of administrative records, photographs, letters, scrapbooks, and printed material to the MHS will help

make the school's history and accomplishments available to researchers, scholars, and others interested in learning more about special education, diversity, and disability.

*"Your history of progressive, innovative, and inclusive education will be of great interest to researchers exploring the history of special education, disability, and diversity."*

- Brenda Lawson, MHS



Above: Basket weaving class, by unknown photographer, 1909. Next page (clockwise from top right): Minutes of the Cotting School Industrial School, October 25, 1901; Cassius Clay (Muhammed Ali) visit to Cotting School classroom, unknown photographer, 1964; Letter from President Bill Clinton on the 100th anniversary of the Cotting School, August 9, 1994; Page from Report of the Cotting School Executive Committee, 1906.

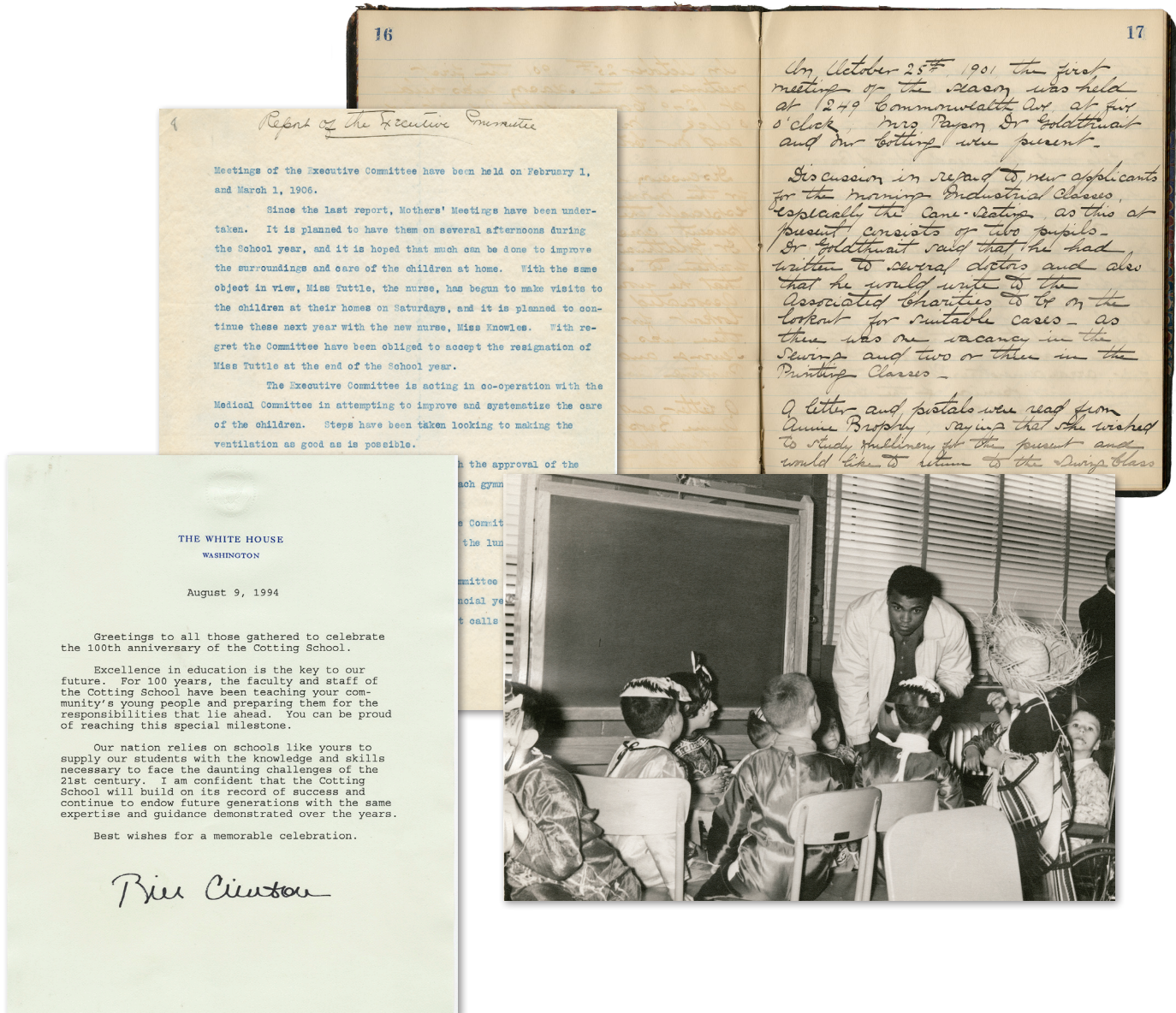
Established in 1893, Cotting School was the first school in America for children with physical disabilities. Today, its mission is to enable students with special needs to achieve their highest learning potential and level of independence. The archive of materials deposited with the MHS will play a crucial role in the study of disability history. It will help explain the evolution of special education through methodology and innovation, including different diagnoses, equipment, and medical language.

In her remarks at the event in March, Ms. Lawson stressed the important work done by the MHS to amplify voices that have traditionally been absent from the historical record. She thanked the school

for its vision to share its story with researchers and the public at large, and for choosing the MHS to steward its history of ground-breaking work.

### About Cotting School

Cotting School creates an inclusive community that fosters academic achievement, skill development, and social-emotional maturity. It has evolved to meet the unique needs of students with a broad spectrum of learning and communication disabilities, physical challenges, and complex medical conditions. Located in Lexington, Mass. since 1988, the school's programs are designed to enable students to realize their highest potential both during and after their enrollment.



# New Acquisitions

The MHS acquired 217 linear feet of manuscript material in FY2023 through 124 gifts and 6 deposits.

- Gifts**
- Suzanne K. Adams: *Diaries and account books of Daniel Adams, Jr., of Beverly, Mass., and Ellsworth, Me.*
- Adams Memorial Society: *Additions to the Adams Memorial Society records*
- Nancy White Ahmadifar: *Addition to "Apocalypse Now: The Pandemic Journal," 2022*
- Samuel S. Alexander Trust in memory of Charles Russell Peck, Helen Arden (Peabody) Peck, and their children: *Papers of Charles R. Peck*
- Algonquin Club: *Additions to the Algonquin Club records*
- Heirs of Ethel C. Amory: *Cummings-Forbes family papers*
- Anonymous: *Adams and Dexter family papers*
- Anonymous: *Daily menus for the Berkeley Hotel in Boston kept by chef Anthony Brunella*
- Estate of Christine Bader: *Webster and Peirce family papers*
- Joanne S. Barres: *World War II letters of Samuel L. Barres of Newton*
- Elizabeth Barrett
- Elizabeth Bates: *Recipe notebooks compiled by Helen Mayberry*
- Carol June Baumrucker née Dockum
- Peter & Lucinda Borrone
- Boston Braves Historical Association: *Printed and visual material documenting the history of the Boston Braves*
- Joseph Lee Boyle
- Mary L. Bundy: *Francis B. Lothrop, Sr., family papers*
- Frederick D. and Pamela M. Cain: *Arthur Martin Cain Civil War letters*
- Julie Cappe
- Katherine L. Carroll
- Phillip Carter: *Albert Ivory Sands family papers, primarily Civil War letters of Albert Ivory Sands*
- Dan Casavant: *Misc. account books*
- Frances M. Clarke
- Lynda Cook: *Legal documents of the Prouty, Powers, and Russell families of Shutesbury*
- Cotting School (deposit): *Records of the Cotting School*
- Louise M. Croll: *Fugere and Boucher family papers*
- Giselda Del Prete: *World War II letters written by Edward and Guido Pettinelli to their sister Eva Pat Dennehey*
- Matthew Dennis
- Dennis (Mass.) Historical Society
- Eliot Congregational Church of Roxbury (deposit): *Records of the Eliot Congregational Church of Roxbury*
- Eliot School of Fine and Applied Arts (deposit): *Additions to the Eliot School records*
- Margaret Ewing: *Hall-Robbins-Howe family papers and photographs*
- Fenway Studios Cooperative, Inc. (deposit): *Additions to the Fenway Studios records*
- Dennis Fiori
- First Parish Dorchester (deposit): *Additions to the First Parish Dorchester records*
- First Parish of Plymouth (deposit): *Additions to the First Parish of Plymouth records*
- Estate of H.A. Crosby Forbes (through Robert P. Forbes): *Additions to the Sheldon L. Crosby and H. A. Crosby Forbes papers*
- Leslie Fox: *Sermon notes kept by Rev. Adonijah Bidwell, pastor of the Church in Tyringham (now Monterey)*
- Donald Friary, in memory of William Henry Friary: *Map of Abington, Mass., two versions, 1873*
- Paul Friday
- Friday Evening Club: *Additions to the Friday Evening Club records*
- Philip Gambone
- Georgia Historical Society: *Letters to Unitarian minister Caleb Davis Bradlee of Boston*
- Descendants of William Blacker Gerry, nephew of Elbridge Gerry: *Papers of the Gerry family of Marblehead, including six letters from Elbridge Gerry*
- Paul Gray
- Katherine H. Griffin
- David Gumbley
- Elton Hall: *Ballad of Skipper Sam & Bosun Link & Little Cranberry Anne, original piece containing watercolors and typed verse by Waldo Pierce, 1955*
- William F. Hartford
- Philip A. Hayden: *Additions to the Walsh family papers and photographs*
- Gretchen Hays: *Civil War letters to and from John A. Bacon of Groveland and Bacon family papers*
- Terry Heller
- Katherine Hermes
- Ronald Heroux
- Rachel B. Herrmann
- Sandie Hischier
- Arthur C. Hodges: *Addition to his diary, 2022, and a typescript copy of "Mr. J. E. Warren's account of his stay in Andersonville during the Civil War"*
- Rachel Homer
- Ellen Evert Hopman: *Addition to "My Personal Plague Diary," 2021-2022 (digital)*
- Brian G. Humphrey
- Mary Hurban
- Mary Keenan: *Autograph document containing lines Charles Sumner delivered on the Senate floor, January 31, 1861*
- Kate Kelley
- Ann Kennedy: *Recollections by Bernard Wiesman*
- Ruth Kowal: *Curtis family photographs*
- Kevin G. Lafond
- Lewis Land: *Smith-Shannon-Tucker-Low family papers and photographs*
- Allison Lange
- Nick Lasinsky
- Jane Wigglesworth Lescure
- Thomas Little
- Emily Lodge and John A. Garraty, Jr.: *Correspondence between Henry Cabot Lodge, Jr., and John A. Garraty regarding the latter's biography of Henry Cabot Lodge, Sr.*
- Maine Historical Society: *Anonymous ledger for a wood and cordage business in the Boston area*
- Abigail Manny, Alison Hagen, and G. P. Penati: *Log of the brig Eunice Adams*
- Mass. Dept. of Conservation and Recreation
- Massachusetts Moderators Association: *Records of the Massachusetts Moderators Association*
- Robert Mayer
- Andrea Leavitt McGovern: *Records of the Summit Club of Chelsea*

McLean County Museum of History  
Patrick McMahon  
Medford Historical Society & Museum  
Joseph N. Monahan  
Barbara Nachtigall  
Naushon Trust, Inc.: *Hand-colored manuscript map of the Elizabeth Islands, including Naushon, ca. 1836*  
Kit Nichols: *Simonetti family papers and business records*  
Lyle Nyberg  
Janet O'Farrell  
Sara and Tim Orel: *Diaries kept by Harold Orel of Dorchester*  
Pejepscot History Center  
Thomas H. Perkins: *R. Forbes Perkins Collection*  
Rebecca Jo Plant  
Scott Polek  
Brigid Powers: *World War I diaries kept by E. Richard McElligott of Boston*  
Proprietors of Louisbourg Square: *Additions to the Proprietors' records*  
Paul Rothrock: *Memoranda book kept by Rev. Adonijah Bidwell*  
Stephen Lee Saltonstall  
Alvin Schaut  
James and Susan Shaw  
Robert and Judith Silverio  
Estate of Leonard Sipiora  
Greenfield Sluder  
Helvi Smith  
Social Circle in Concord  
Nancy Solodar: *Diary kept by Clarence Holbrook Denny*  
South County History Center  
Donna Chaff Specian  
Darwin Stapleton  
Mary Otis Stevens: *Additions to the Mary Otis Stevens papers*  
Cassandra Swift Reeves Stone: *Lamb-Rotch-Sargent family papers and photographs*  
Estate of Byron Sutherland  
Paul Michael Taylor

Ticknor Society: *Records of the Ticknor Society*  
Mario Toglia  
Jeanne Tucker  
Kevin Waite  
Teed Welch: *Diplomas issued to John Codman Ropes, co-founder of Ropes & Gray, and Francis Codman Ropes*  
Thomas G. Wells: *Papers of the Wells, May, and Willis families*  
Anne Wheelock: *Covid journal, 2020-2021 (digital)*  
Peter Booth Wiley  
John Williston: *Papers of the Williston family of Northampton*  
Kanisorn Wongsrichanalai  
Estate of Edward Watson Wood, Jr.: *Letters, diaries, and photographs of the Tiffany family of Blandford*  
Colin Woodward: *Anonymous Swift family diary*  
Donald Yacovone  
Mary Yacovone

#### Art and Artifacts

Estate of Mary Arandale Tomlinson Brown: *Framed oil portrait of Mary Hobart Curtis and photographs of the Curtis family*  
Lawrence M. Estey: *Silver loving cup engraved with a note from Rev. Phillips Brooks*  
Megan Marshall: *Marshall family textiles*  
Estate of Susan Schur: *Phrenology model head by Gargoyles Studio of Brooklyn*

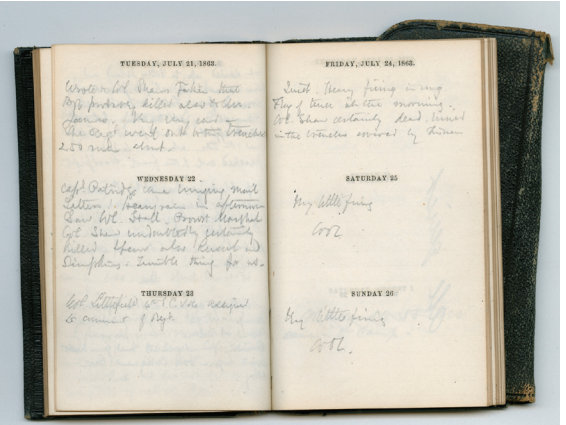
#### Purchases

*Allston Hall...Monday, December 6th, 1862... Positively Last Week of Buckley's Serenaders! Brass Band and Ethiopian Burlesque Opera Troupe!* (Boston: J.H. & F.F. Farwell), 1862 (theater broadside)  
*The attention of Mill-owners, Manufacturers, and Owners of Water Power is respectfully requested to the Water Wheel Manufactured by the Fulton Iron Foundry Company, South Boston, Mass.* (trade broadside)

Log of the ship *Augusta*  
Papers and photographs of mother and daughter Leslie Lepington Fisher (later Bemis) and Leonora Bemis  
Letter from John Blanchard to Harriet Chambers of Brewer, Me., 1851  
Letter from William Ellery Channing to John Davis, 1823  
Diary of Constance Crowninshield Coolidge, 1938  
World War I diary kept by J. Erickson of Fitchburg  
Constitution, minutes, and reports of the Female Missionary Association of Brighton  
Account book kept by James Gillmor of Franklin  
Pictorial map and cartoons of the Harvard Boston Aero Meet  
Papers of traveler and philanthropist Nellie F. Hill of Groton  
*The Anti-Slavery Papers of James Russell Lowell* (Boston and New York: Houghton Mifflin, 1902)  
Letters to John Noble, Boston attorney and clerk of the Massachusetts Supreme Judicial Court  
Walter Franklin Pierce, *The Case of Patience Worth: A Critical Study of Certain Unusual Phenomena* (Boston: Boston Society for Psychic Research, 1929)  
Civil War diary kept by Lincoln Ripley Stone, assistant surgeon of the Mass. 54th Infantry Regiment  
Horatio Robinson Storer, *The Causation, Course and Treatment of Reflex Insanity in Women*. (Boston: Lee and Shepard, 1871)  
"Union Is Power" [Probably Lowell, February 1834, broadside] (broadside)  
Letter from Daniel Webster to [Thomas Dawes] Eliot, [1850]

## Acquisition Highlight: Civil War Diary

The diary of Lincoln Ripley Stone, assistant surgeon of the Mass. 54th Infantry Regiment, May-December 1863, contains entries that begin with the regiment's movement toward South Carolina and record the tragic losses at Fort Wagner in July, including the death of the unit's leader, Robert Gould Shaw: "Col. Shaw certainly dead, buried in the trenches by his men." In addition to detailed accounts of regimental action, the volume provides a five-page list of the soldiers he treated for injuries. Also included are photographs of Stone and family members.



# Financial Statements

## Treasurer's Report

I am pleased to submit this annual Treasurer's Report of the Massachusetts Historical Society. Despite significant challenges resulting from the recent pandemic, the Society's finances remain strong. Over the past five years, the endowment has grown by approximately 54%, to \$127.5 million as of June 30, 2023. This growth has enabled the Society to provide significantly increased value to our stakeholders.

During the past year, the Board of Trustees and senior staff embarked on a strategic planning process to increase institutional capacity, deepen our management team, and sharpen our strategic focus. As part of this effort, the Board approved a temporary increase in the endowment draw rate from 4.5% to 5.5% for Fiscal Year 2023. Going forward, with expected increases in fundraising, we plan to reduce the draw rate to a more traditional percentage over time.

For Fiscal Year 2023, the higher draw provided funding for select promotions and key positions, including two new senior vice president roles and a director of human resources. Additional investments in technology and facilities were made to enhance the visitor experience and expand our visibility and reach.

As of June 30, 2023, cash and investments were \$131 million. This amount includes the endowment, together with operating and capital reserves of approximately \$2.1 million. Net assets were \$139.1 million, including \$51.6 million that is unrestricted. With ample financial resources, the MHS is well positioned for continued growth and development of our outstanding programs and services.

Respectfully submitted,

Edward B. Baldini, Treasurer



## Statement of Activities & Financial Position (in thousands)

<b>Statement of Activities</b>	<b>2023</b>	<b>2022</b>
Unrestricted revenues and support		
Gifts and grants	\$ 1,262	\$ 1,049
Fellows and Members dues	—	110
Royalties and rights	63	73
Seminars, conferences, workshops, and other events	57	406
Other revenues	222	(67)
Release of restricted gifts	522	779
Endowment	<u>5,807</u>	<u>3,946</u>
	7,934	6,296
Operating Expenses	<u>8,447</u>	<u>7,720</u>
Increase (decrease) in net assets from operations	(513)	(1,424)
Non-operating activity		
Endowment gifts, grants, and bequests	546	107
Purchase of collections	(114)	(99)
Proceeds from sale of collections	—	—
Investment return, net gain	5,468	(5,899)
Endowment support	<u>(5,807)</u>	<u>(3,946)</u>
Increase (decrease) in net assets	<u>\$ (420)</u>	<u>\$ (11,261)</u>
<b>Statement of Financial Position</b>	<b>2023</b>	<b>2022</b>
Assets		
Cash and cash equivalents	\$ 3,596	\$ 3,550
Endowment investments at market value	127,470	127,669
Property, equipment, and other assets	9,495	9,770
Other assets	<u>741</u>	<u>819</u>
Total assets	<u>\$ 141,301</u>	<u>\$ 141,808</u>
Liabilities	\$ 1,368	\$ 1,258
Long-term debt	792	990
Net assets		
Unrestricted	51,571	51,652
Temporarily restricted	69,665	70,257
Permanently restricted	<u>17,905</u>	<u>17,652</u>
Total net assets	<u>139,141</u>	<u>139,560</u>
Total liabilities and net assets	<u>\$ 141,301</u>	<u>\$ 141,808</u>

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*The FY2022 Annual Report failed to acknowledge the generous donation of Conrad E. and Mary B. Wright, who supported the MHS at the \$25,000 and more level.*

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### John B. Paine, Jr. Annual Lecture on the History of Business and Innovation

Thanks to the generosity of a gift made by Thomas M. and Lynn S. Paine, we are pleased to announce the John B. Paine, Jr. Annual Lecture on the History of Business and Innovation. John B. Paine, Jr., was a loyal Member of the MHS from his election in 1954 until his death in 1976, serving as Treasurer from 1957–1970. Tom Paine commented that he and Lynn made the gift to honor his father who was “largely responsible for the 1940 donation of the Paine Papers, the portrait of Robert Treat Paine, and the 17th-century IK inscribed press cupboard.” He went on to say, “We also wanted to support the important work done by MHS and draw attention to the critical role of business and innovation in our nation’s history. A pioneering socially responsible investor and innovator in his own right, Dad would be thrilled that the Society sponsors lectures on business history and innovation.”

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