



2020 Annual Report

The legislation which chartered the U.S. Capitol Historical Society – 36 USC 1203, Chapter 2203 – states that its purposes are:

(1) to encourage in the most comprehensive and enlightened manner an understanding by the American people of the founding, growth, and significance of the Capitol of the United States as the tangible symbol of their representative form of government;

(2) to undertake research into the history of the Congress and the Capitol and to promote discussion, publication, and dissemination of the results of this research;

(3) to foster and increase an informed patriotism among the citizens in the study of this living memorial to the founders of this Nation and the continuing thread of principles as exemplified by their successors; and

(4) to cooperate with the standing committees of Congress, the Library of Congress, the Architect of the Capitol, and relevant departments, agencies, and instrumentalities of the executive branch of the United States Government in carrying out the purposes of the corporation.



USCHS IN FISCAL YEAR 2020

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COVID-19 Update

The shutdown of the Capitol on March 13th, 2020 changed everything for the Society (and for the rest of the world). The majority of USCHS programming which generates revenue and participation occurs during the spring and summer months, especially with 2020 being an election year when Congress is out of session for most of the Fall. All of the Society's in-person events were postponed or cancelled.

USCHS revenue projections are down dramatically for both the remainder of this quarter and for FY21. At this point we anticipate that our income will be only 66% of the budget projections and while we have done our best to reduce expenses, the expense will be at 86% of the budget.

All USCHS employees are working remotely with the exception of the very few who can walk to work to handle mail, write checks, and fulfill merchandise orders. As DC prepares to enter Phase II of reopening, we will continue to allow all employees who prefer to work from home to do so.

Additionally, we issued guidelines to those employees who choose to return to the office based on the latest guidance from the CDC, OSHA, and DC Department of Health. We had extremely hard decisions to make in the adoption of the FY21 budget at the June meeting to match the size of the organization with our income projections. Because of the magnitude of our challenge, both the Executive and Personnel/Compensation Committees met several times to develop the budget recommendations and presented alternatives to the board. The Budget FY21 reduced the salary and benefits line by \$400,000.

United States Capitol Historical Society is a nonprofit and nonpartisan educational organization created in 1962 to promote the history of the Capitol and Congress. USCHS serves as an informational and educational resource for its members and the general public. To learn more, visit our website at [USCHS.org](https://www.uschs.org)

Program Activities

PARTNERSHIPS AND EVENTS

“to encourage in the most comprehensive and enlightened manner an understanding by the American people of the founding, growth, and significance of the Capitol of the United States of America as the tangible symbol of their representative form of government...”

The most obvious challenge facing our public program offerings is not simply the COVID pandemic itself, but the changing nature of public health guidance. At the start of this crisis, it bears remembering, few expected such a sustained shutdown of the Capitol or extreme social distancing. It now seems long ago and quaint to note that public health guidance was against wearing masks. With some worst-case scenarios calling for the Capitol to remain closed to the public for a full year, and the potential for a second wave, we cannot responsibly plan for any in-person event in the imminent future. At the moment, the only certainty is uncertainty. As such, our events are virtual until it is safe to meet in-person again.

Freedom Award

The Freedom Award recognizes an individual or organization for educating the public about freedom as represented by the Capitol and Congress and representative democracy. Recent recipients include, The Architect of the Capitol, Lin-Manual Miranda, David McCullough, and Congressman John Lewis. About 150 Members of Congress, staff and USCHS VIP's attend. **Dr. Carla Hayden**, the Librarian of Congress, has accepted our invitation to receive the 2020 USCHS Freedom Award for her work bringing the Library of Congress to the Public and the Congress in meaningful ways.

The virtual Freedom Award event held on **Wednesday December 9, 2020** brought over 150 people together virtually to celebrate Dr. Hayden.

Capitol Hill Day

Led by the Capitol Visitor Center (CVC), USCHS is one of a group of organizations in the Capitol Hill area that hosted community-oriented activities and educational programs on September 28, 2019. USCHS offered tours of the grounds and the surrounding neighborhood promoting the context documented in our book, *Creating Capitol Hill*.

Strengthening our partnership with CVC and prospective members and allies from the local community, about 25 people took the entire tour while countless others learned about USCHS and the potential to take a tour later or participate in our other events.

National Heritage Lecture - Sept 14, 2020

USCHS, the White House Historical Association and the Supreme Court Historical Society take turns providing an educational program on their respective branch of government. Each year, all partners invite their members to attend the program that year. In 2020, USCHS provided the programming. The theme for 2020 was the partnership between **President Eisenhower and the Congress** to create the Interstate Highway System.

We partnered with the Eisenhower Memorial Commission for this event. The timing coincided with the dedication of the Eisenhower memorial. The event served as the official kickoff to “IKE Week,” in which the Eisenhower Memorial Commission dedicated the newest monument in Washington, DC to our 34th President.

The program included greetings from several Members of Congress and remarks from former Transportation Secretary **Ray LaHood**, former FAA Administrator **Michael Huerta**, and transportation scholar **Jeff Davis**.

Member Programs

USCHS offers special educational programs to members to promote community engagement on Capitol Hill. Members enjoyed a tour of the Congressional Cemetery in Q2 and were scheduled for tours of the Library of Congress in Q3, which were postponed due to COVID-19





Brigadier General Tim White, PhD (USAFR), USCHS Trustee



Constitution Day Panelists



Speaker Nancy Pelosi and Jane Campbell

TOURS

“to foster and increase an informed patriotism among the citizens in the study of this living memorial to the founders of this Nation and the continuing thread of principles as exemplified by their successors...”

Tours are a central part of the USCHS program, designed to foster understanding of the U.S. Capitol as a symbol of American democracy.

USCHS-led Tours provide the historical context of the work of the Congress and the art and architecture to students, visitors, foreign diplomats, Members of Congress and their staff, and interested members of the public. Tours include interior of Capitol, walking tour of Capitol Hill neighborhood, the Library of Congress, and Congressional cemetery.

Unfortunately, the Capitol is still closed to public tours. We have not done any tours since the closure of the Capitol on March 13. We are in regular contact with the Architect of the Capitol who advises us that

when the initial reopening comes the first tours allowed will be led by Members of Congress or Former Members of Congress and limited to 10 people.

Brandi Gasser, our Tour Coordinator, moved to Chicago for a new job and left on March 13. We did not fill this position as we instituted a complete hiring freeze.

We reopened for walking tours of the grounds with appropriate health guidelines (masks, limits on group size) as DC moves to Phase 2 of reopening. To date, we provided a limited number of tours.

We moved to the virtual tours of the Capitol Hill Neighborhood with lunch time chats with Steve and Jane on April 16th, 2020 (DC Emancipation Day) and provided webinars sharing the history of the development of the Capitol and the neighborhood every Thursday at lunch. Between 70-200 attendees join us at each virtual event. The tours are based on our book, *Creating Capitol Hill*. As a result of these talks, we sold 14 copies of the book.



Number of Tours

During Fiscal Year 19, USCHS gave 334 total tours of Capitol Hill. During Fiscal Year 20, we only gave 152 tours.

Number of Attendees

We recorded a total of 6,132 attendees on our tours in Fiscal Year 19 but 2,917 attendees during Fiscal Year 20.



Volunteers

USCHS is thankful for its 100+ volunteers including Guild guides and DC City guides who have undergone our training. Seven of these volunteers give daytime tours. We created a new partnership with up to twenty former members who are willing to volunteer for five tours/ year. These volunteers become members of the Capitol Committee at the basic level and we agree to provide one of our historical guides to accompany the Member on a tour of their choice with clients.

Congressman Pomeroy is the first to try this agreement.





PUBLIC HISTORY

“to undertake research into the history of the Congress and the Capitol and to promote discussion, publication, and dissemination of the results of this research...”

“Truth is the Only Client”

On October 23, 2019, USCHS, in partnership with the United States Capitol Visitor Center (CVC), presented “Truth is the Only Client,” a new documentary and panel discussion that examined the workings of the Warren Commission, officially known as The President’s Commission on the Assassination of President Kennedy.

Trustee **Tim White** opened the program. Five staff members of the Commission participated in the discussion of their important work. More than 200 people attended and separated provable facts from what has become the legend surrounding the assassination by examining all that was uncovered by the investigation and what has been learned since. The program attracted a new corporate member, the **National Association**

of Chain Drug Stores.

100 Years of Women Voting

The Annual Symposium, adapted as a series of six webinars, on consecutive Thursdays, that began on **27 August, 2020**. The Library of Congress co-sponsored the event and the National Suffrage Centennial Commission supported the symposium with a grant.

The scholars and schedule were as follows: On August 27th, **Christina Wolbrecht** gave the Keynote address to kick-off the Symposium. **Liette Gidlow, Cathleen Cahill, Rep. Marcia Fudge**, and **Andra Gillespie** participated in the “Race and Gender in Politics: The Last 100 Years” panel on September 3rd. The “Diverse Voices from the Suffrage Movement” panel was presented by **Elizabeth Novara, Nancy Bird-Soto, Lori Harrison-Kahan**, and **Jacqueline Jones Royster** on September 10th.

The following week, panelists **Jane Campbell, Sen. Mary Landrieu**, and **Michele Swers** presented “Women in

Leadership" on September 17th. The last panel, "Gender and Political Participation", was presented by **Colleen Shogan, Betty Collier-Thomas, Kay Schlozman**, and **Catherine Wineinger** on September 24th. This was followed by **Martha Jones'** keynote address which closed our 100 Years of Women Voting series.

Lunchtime Lectures:

Scholars Series webinars bring prominent academics with a Congressional or Capitol focus to our audience by offering historical perspective on the work of Congress in the Arts and crossover with Congressional engagement. Our target audience for this series is Congressional staff. All told, we had 255 registrants, 60 were Congressional staff.

In Q1 we were lucky to have presentations by **Nancy Sheppard** on Churchill and Congress, **Charles Calhoun** on Grant's presidency, and our own Chief Historian **Chuck diGiacomantonio** on *The Insurgent Delegate, George Thatcher*.

In Q2, we hosted **Bob Levey**, former Washington Post columnist, for discussion on his book *Larry Felder, Candidate*. **Lee Pollock** lectured on Churchill and Congress, thus

continuing our relationship with the International Churchill Society and the National Churchill Library and Center at GWU. **Jacquelyn McDonald**, a 2019-20 Capitol Fellow, lectured on artist Elisabet Ney and her statue of Sam Houston in the Statuary Hall Collection. This presentation was followed by **Don Hawkins**, a former Capitol Fellow, on Peter L'Enfant's DC Plan. Board member **Ken Bowling** gave the last lecture of Q2 on the Bill of Rights -- how it got that name and his own involvement in the discovery and recovery of North Carolina's lost original copy.

To commemorate Black History Month in Q3, **Sara Bon-Harper**, the executive director of James Monroe's Highland, and **Jennifer Stacy**, a member of Highland's descendant community, spoke on recent discoveries at the site and approaches to collaborative history. **John Colletta** followed this presentation with a lecture on the relationship between Clark Mills and Philip Reed, the sculptor and enslaved man who built the statue of *Freedom*.

During Q4, **Chuck diGiacomantonio** presented on the politicized environment of congressmen's lives in Washington, D.C. during the Jefferson administration, **Felicia Bell** spoke on African-Americans' role in the construction of the U.S. Capitol, and **David Gerleman** lectured on

Benjamin Brown French's Washington and his involvement with Congress and the U.S. Capitol. Additionally, **Fergus Bordewich** spoke on his book *Congress at War*, covering Congress during the Civil War and **Debby Hanson** spoke on the *Apotheosis of Washington*.

Fiscal year 21 commenced with lectures from **Stephen West**, Associate Professor of History at Catholic University; on the connections between two suffrage amendments—the 15th amendment and the 19th amendment, **Alessandra Lorini**; on public memory, statuary, and a case study on the statue of Fr. Kino in the National Statuary Hall Collection; and former Capitol Fellow **Lynda Cooper**, on the connections between art at the 1893 Columbian Exposition and in the Library of Congress. Our programming also featured **Colleen Shogan** on her latest "Washington Whodunit" novel set in the Library of Congress.

"Lunch Bites" (April 16—present) provides our audience with a variety of programming, from virtual tours to lesser-known chapters of Capitol and

DC history. August featured Steve Livengood on several Capitol History topics, **Hayden Wetzel** on Animal Control in DC, **Robert Pohl** on rarely told Capitol Tour stories, and **Garrett Peck** on Prohibition in Washington, DC.

Toward a More Perfect Union is the Society's next webinar series, which examines the role of Congress in advancing, and sometimes hindering, our nation's progress towards the fulfillment of our founding principles.

This series extends from November 2020 through March 2021 and will bring scholars and practitioners together to examine movement toward racial and economic justice, expanding the participation of Native Americans in our government and how tribal sovereignty fits into the "more perfect union," issues of educational opportunity and voting rights, and many more.



Capitol Fellowship Program

Our Q2 fellows were **Elizabeth Kiszonas** researching Leutze's "Westward the Course of Empire" in the context of American art and literary culture, **Jacquelyn McDonald** researching sculptor Elisabeth Ney and her two statues, which Texas contributed to the National Statuary Hall Collection, and **Karol Williams** researching current and alternative approaches to the visitor entry experience of the Library of Congress and comparing them to the original design. Karol Williams is the sole remaining Fellow working in the current 2019-20 cycle. She managed to complete the first of her two months' grant before March 13 and is making arrangements with the Curator's Office to continue her research once repositories re-open.

Maria Cristina Loi's planned return to complete her fellowship researching Jefferson's role in the architectural development of the Capitol in Q4 is on hold due to the pandemic.

The 2020-21 Fellows have been selected by the USCHS and the Architect's Curator's staff with formal confirmation by the Architect's Office. Acceptance by selected candidates is pending. Candidates are **Mary Zundo**

on "reading" the landscape and design of Emanuel Leutze's "Westward...Empire" and **Blake Lindsey** on responding to congressional requests for research on the history of practices, experiences, and impacts of U.S. Capitol public tourism.

Interns

The entire internship program was redesigned in Q3, incorporating a uniform application process and an active outreach to students at HBCUs. This process yielded a high-quality, diverse applicant pool. Sadly, we canceled the summer 2020 internships and offered the candidates the option to defer to Fall 2020. In Fall 2020, we had 2 extraordinary interns from the Bill Archer Fellowship Program at the University of Texas at Austin.

In our Spring 2020 class, we were fortunate to have had two dedicated interns who transitioned to working from home after the shutdown period. Matt Fitzgerald and Erik Johnson both determined to continue working even after their programs sent them home. They finished their full internships. They completed the base research for the 2022 calendar (730 facts total).

Publications

The Capitol Dome magazine
(semiannual in Fall/Winter and Spring/Summer)

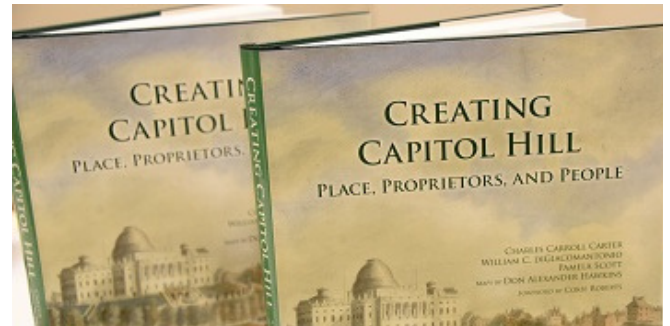
The Fall/Winter 2019 + Spring/Summer 2020 double issue was published on June, 30, 2020. The Fall/Winter 2020 issue has two of three submissions in-hand and edited while one is nearing completion (according to author); target publication date, late February 2021.

USCHS Calendar

The 2021 Calendar is complete and in hand. **Chuck diGiacomantonio** has written the daily facts, drawn from research conducted by 2018 and 2019 interns. He also wrote an essay for the back of the calendar. **Diana Wailes** handled the design, including the selection, acquisition, and approval by Hill staff of images. Calendar marketing began in May.



Staff completed research and selected final entries drafted during summer 2020. The draft of most entries for the 2022 calendar (covering "this date in 1822") was completed by Spring Semester interns before April 1.



Stand-alone books

Creating Capitol Hill: Place, Proprietors, and People was published in June 2018, is still being promoted, and formed the basis for our walking tours. *History of the US Capitol*, the newly abridged edition of Bill Allen's "authorized biography of the Capitol", is under review with possible publication in calendar year 2021.

Statuary Hall: History, Art, Meaning (in collaboration with the Curator of Architect's Office) is underway with anticipated publication during the 2021 calendar year. In collaboration with the House Historian's Office, the revised edition of *Ways and Means Committee History* is nearing completion and we expect publication in the Government Publishing Office in late 2020. The new and revised text for the *Guide to Capitol* handbook is complete and the copy layout is ongoing.

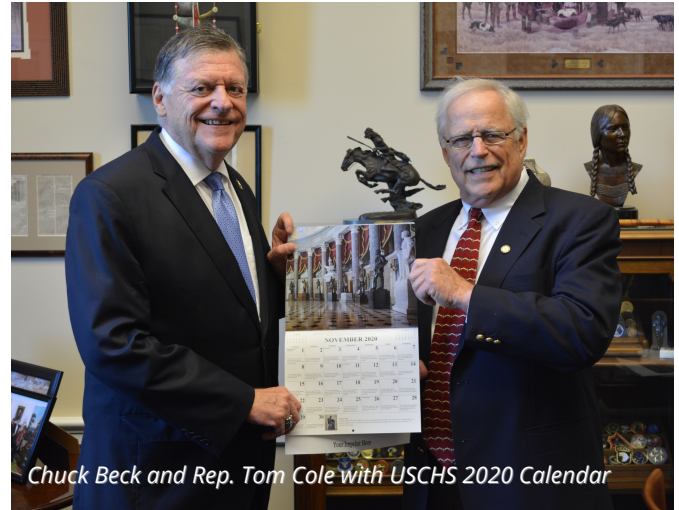
Capitol Stories Updates

Capitol Stories is like a journal—we plan to add two new “issues” (modules or stories) to the platform annually. Current Capitol Stories modules include Constantino Brumidi’s near-death experience, Jeannette Rankin’s anti-war votes, John Quincy Adams’s fight against the gag rule, The Civil Rights Act of 1964, Saving the Government Records: War of 1812, and Winston Churchill’s speech to Joint Meeting (Dec., 1941). New entries being reviewed and prepared for publication are JFK’s Assassination and Douglas MacArthur’s “Farewell Address” to Joint Meeting of Congress (19 April 1951).

COMMUNICATION WITH MEMBERS AND SUPPORTERS:

Email Newsletters/Promotions:

We increased the frequency of our emails to once weekly for general newsletter promotion of online educational resources. Our morning-of promotion of former USCHS Fellow and The Capitol Dome contributor Anna Marley’s webinar at the Pennsylvania Academy of Fine Arts caused the event to sell out within an hour of our email blast. We found this change in frequency to be a valuable and valued constituent engagement tool as promotion of puzzles yielded 48 sales. A follow-up campaign



continues to capitalize on this unique opportunity to move written-off stock rapidly.

Outreach via Digital Media:

In addition to routine blog posts, we utilize social media posts that include a history fact of the day to reach 2,533 followers on Facebook (@USCapHis and @CapitolHistory), 25,618 followers on Twitter (@USCapHis and @CapitolHistory) and 1,377 followers on Instagram (@USCHS). Our website shares new content each weekday and experiences ongoing updates to features like Capitol Stories and other misc. content (e.g. Constitution Day feature).



CIVIC EDUCATION

“to encourage in the most comprehensive and enlightened manner an understanding by the American people of the founding, growth, and significance of the Capitol of the United States as the tangible symbol of their representative form of government...”

We the People (WTP) Constitution Tour

Every year, from October through March, USCHS leads a consortium of ten organizations to provide a full-day field trip to DC students. This activity teaches them about the first three articles of the Constitution by visiting the sites represented by those articles during our Constitution Tour.

We completed our entire schedule prior to the shut-down. The DC Public Schools already determined that they will not conduct field trips in the upcoming school year; thus, we convened our partners to create a set of virtual offerings. Most of the partners have digital content and many will provide in person (virtual) support for the DC teachers who use the content. The DC schools are

including our curriculum in their learning platform for middle school social studies. This is a work in progress.

Our virtual We the People tour will make use of the existing NBC videos on a new website that will hold all of the content from each of the partners in one place. The DC Public Schools will direct their teachers to that page. We will create clones of the pages with unique URL's to share with other school districts. An important component is to offer live, interactive sessions with WTP partner sites to supplement the webpage content, but to prioritize offering that interactive experience to DC schools. Happily, five of the partners have agreed to offer live, interactive sessions with the DC classes who request it. This interactive portion can be expanded to schools outside of DC in subsequent years as our partners have availability.

WTP tours engage about 1,200 students and teachers per year. In the 2019-2020, 1,639 and 170 adults (teachers and chaperones) participated in the program. This was a record number of

participants. Over 15 years, a total of 22,2832 students and adults have participated. More than 60% of teachers describe the experience as excellent. 94% say it will help their students see the Constitution as relevant in their lives, and 77% think it will encourage their students to be involved in public service. About 42% had never been to the Capitol before. 64% want to return to visit with their family and said the program made them more likely to register to vote when they turn 18. 31% are more likely to run for student government and 47% are more likely to contact their elected officials about issues that are important to them.

We the People Constitution Tour Microsite Partnership with NBC Learn

USCHS engaged five members of Congress including the Speaker of the House as featured experts for the series. Additionally, we engaged the White House Historians as well as our in-house historians. To provide content, we engaged the National Park Service, the White House Historical Association and the National Archives. The public launch occurred on Constitution Day September 17, 2019 during the *"Fostering Informed Citizenship"* featuring NBC Correspondent Kristen Welker and an expert panel available

on C-SPAN recording.

The existing videos cover the first three Articles of the Constitution. NBC ended its NBCLearn website -- limiting the reach and accessibility of our joint venture -- but will move our series to the NBC News site along with other NBCLearn topics. NBC wants to continue its partnership with USCHS to develop additional videos to cover the Bill of Rights and some other special topics. We expect that Kristen Welker will continue to be involved. USCHS met with new producers at NBC who will do the work and assist with providing technical information for funding proposals. This effort requires new funding.

Other Direct Work with Educators and Students

The Inspired Teaching Fellowship takes place during the DC Public Schools academic calendar.



USCHS established a partnership with Ashbrook Center on teaching history. Because of this, **Dr. Tim Haglund** of the Ashbrook Center participated in the “Fostering Informed Citizenship” panel. We provided a tour and speaker for their annual VIP conference and assisted in the professional development for history teachers conference planning. We will continue to offer to host their professional development for history teachers when COVID will allow them to resume in-person workshops.

We have maintained a relationship with the Calvin Coolidge Foundation as USCHS provides multiple tours annually to the rising-college-freshmen recipients of the Coolidge Scholarship from around the country. These recipients are typically 100 of the best performing students every year. We will continue this partnership when they are ready to resume that program.



Rep. Virginia Foxx hosted a teacher workshop on the First Federal Congress. This seminar focused on the issues and concerns that the First Congress considered, such as The Bill of Rights, Religious Liberty, Free Speech, The Judiciary Act to name a few. The First Congress established precedents for the Legislative Branch and tested boundaries with the Executive Branch and President Washington. This upcoming program was attended by teachers from DC, PA, NJ, DE and CT.

American Political Science Association brings college students to DC regularly for educational tours with Steve Livengood.

CONGRESSIONAL ENGAGEMENT

“to cooperate with the standing committees of Congress, the Library of Congress, the Architect of the Capitol, and relevant departments, agencies, and instrumentalities of the executive branch of the United States Government in carrying out the purposes of the corporation.”

Programs to Honor Congressional Committees

Each year, the USCHS presents a bipartisan educational program that honors a Congressional Committee.

Working directly with Committee staff from both parties, USCHS brings a unique educational component and a welcoming social component. While exact timing varies, these events are usually held early in the Summer. The **Senate Finance Committee** was honored on July 10, 2019, the **Senate Agriculture Committee** was honored on November 5, 2019, and we hope to recognize the 200th Anniversary of the **House Agriculture Committee** at some point in Fiscal Year 2021. About 150

Members of Congress, staff, and USCHS VIPs attend each event.

Program to Honor Congress

Every two years, USCHS invites a historian or other special speaker to join Members of Congress to present a program to recognize and honor the significant positive impact made by Congress. About 150 Members of Congress, staff and USCHS VIP's attend. The most recent event was held on July 16, 2019 with **Dr. Joanne B. Freeman** as the keynote speaker.

Congressional Staff Programs

Twice a year, USCHS invites Congressional Chiefs of Staff or senior Congressional staffers to speak at a lunch for our Capitol Committee members followed by a question and answer session. About 50 of the most generous USCHS donors and special guests attend the program. Unfortunately, this event was postponed due to closure of the Capitol. We are exploring a virtual event for next quarter.

In February, we started our **Congressional Briefing Series**, planned monthly but now on hold due to the public health crisis. This series is designed to bring former Congressional staff to current staff to share the history of managing ongoing challenges. Our first Congressional Briefing, held Feb. 20, 2020, focused on the National Flood Insurance Program. Our panelists were **Merrie Inderfurth**, Washington Liaison for the Association of State Floodplain Managers; **Jason Tuber**, Senior Advisor to Sen. Bob Menendez; **Nicole Austin**, SVP of Federal Affairs at The Reinsurance Association of America; **Cynthia Spishak**, Deputy Assistant Administrator for Federal Insurance at FEMA; and **Tim Wolverton**, Legislative Director for Sen. Cindy Hyde-Smith. Right now, the staff of Congress is focused on COVID-19 and the recovery so our determination is that this series will be on hold until the Capitol reopens.

Annual Trustee Program

Annually, USCHS hosts one of the sitting Members of Congress who serve on our Board of Trustees to have an open discussion with Capitol Committee members. USCHS hosted a meeting with **Senator Roy Blunt** on August 19th, 2020. This was the first Capitol Committee event hosted virtually and it was well received.

In November 2019, Trustee **Dontai Smalls** hosted a corporate prospect event at the UPS Townhouse on New Jersey Avenue SE. More than 25 prospective donors and friends attended the reception and presentation before taking a special, after-hours tour of the Capitol. Trustee **Joe Dooley** brought a friend who became a member as a result of the event.

Assistance to Members of Congress

Over the past year, Members of Congress and Committee Staff began to reach out to USCHS for assistance. Requested assistance ranges from providing special educational tours of the Capitol, to teaching staff to conduct tours for their constituents, providing historical research, and assisting with planning and delivery of programs/events.

In the first quarter of Fiscal Year 2020, the USCHS provided assistance to five Congressional Offices. We provided a personal tour to **Rep. Andy Barr** of Kentucky and his family over the Independence Day holiday, gave remarks to a group of top McDonald's franchisees brought to Washington and arranged by **Rep. Kevin Hern of Oklahoma**, provided tours to staff and teaching fellows from the office of **Rep. Virginia Foxx of North Carolina** -- a USCHS Trustee, -- provided a large,

lafter-hours tour to a Hero Flight of World War II, Korea, and Vietnam War veterans and their families arranged by the office of **Sen. Deb Fischer** of Nebraska, provided a tour to a group arranged by the office of **Rep. Greg Walden** of Oregon, and at the request of the **House Ways and Means Committee** we are updating their history for publication by the government printing office.



Through our partnership with the National Endowment for the Humanities (NEH), Steve Livengood gave special ghost-tours of the Capitol to Congressional Staff in the second quarter of Fiscal Year 2020. USCHS continues to work with Members of Congress and Committee Staff. During the Capitol closure we shared the We the People materials for MOC to provide to their constituents who were suddenly homeschooling.



Congressional Staff Alumni Association (CSAA)

We continue to work with Dome Compass to develop the CSAA. Additionally, we continue our longtime cooperation with the Capitol Page Alumni Association. Their individual membership program also faces extreme challenges due to COVID. The Page Alumni conference planned for Memorial Day weekend 2020 was cancelled and will be rescheduled at a time to be determined. This effort is on hold as the Capitol is closed.

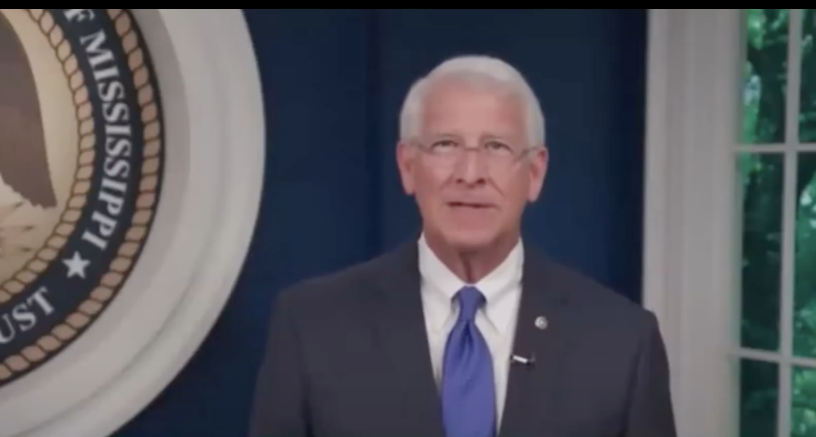


Sharice Davids

U.S. Representative for Kansas



ANNUAL TRUSTEE EVENT
WITH
SENATOR ROY BLUNT
AUGUST 19, 2020



Roger Wicker

U.S. Senator (R-MS)

Merchandising

OVERVIEW

Context: While the Society produces high quality commemorative items, educational materials, and other products, our distribution system has room for growth to meet the changing atmosphere of growing online sales. Prior to 2001, the Society had a “brick and mortar” store in the Capitol itself which generated the majority of the Society’s funds. Our largest wholesale customer is the Capitol Visitors’ Center that sells our products in their gift shops. Now, USCHS is slowly developing and implementing effective and alternative sales opportunities through wholesale and Amazon ventures. Unfortunately, due to the use of electronic devices to keep appointments and record dates, calendar sales continue to decline annually. The calendar, our biggest seller, still brings in net revenue to the Society. Our largest customers are members of Congress who purchase the calendar as a gift to their constituents.

Our ornament sales are in the 10,000/year range while the White

House Historical Society sells 900,000 ornaments per year with only a small fraction of their sales from the physical store. Note that the White House Historical Society began their ornament sales ten years prior to the USCHS beginning their program, firmly establishing their share of the collector’s market.

Challenges: The merchandise department is our most challenging area. We constructed an aggressive online marketing campaign to move slow moving merchandise while promoting early purchasing opportunities for our best-selling merchandise, created from the historic stone products—our primary asset.

Unfortunately, the COVID-19 pandemic created a whole list of new challenges from an economic downturn to the closing of many of our manufacturers delaying key product. Fortunately, our vendors worked diligently to produce what we need. Our 2020 Marble ornament became available September 1, 2020. Our other products will be on

time in spite of the closures. The 2021 “We, the People” calendar has been published and a delivery and promotional strategic plan is well under way.

Another challenge is the Society’s accounting procedures for merchandise. After reviewing the written procedures, the team decided most of the inconsistencies will be corrected by an updated merchandise management system. That upgrade is planned for 2021.



We did a serious review of the over 600 individual items in inventory. We began this review at our strategic planning session. Some are left over from the store in the Capitol that closed 20 years ago. We made decisions about what items to write off and use for promotions or donations to schools as good will gestures. Right now, our balance sheet reports a figure that does not represent the actual value of the merchandise and this analysis will

cause a reduction in our assets to a more realistic figure. Meanwhile, we need to focus on a small number of meaningful items that we can actually sell to support the Society. Merchandise at the moment does not have a marketing strategy that drives their work and this is the key change needed. For example, we sold nearly all of our marble ornaments and could have sold 5,000 more to the CVC in December if we had planned for success in our marketing.

We engaged our outsourced accounting team, Your Part-Time Controller (YPTC) to design proper procedures for merchandise sales to keep the audit records clean. The initial review was about to move to training the team when we got the work from home order. YPTC continues to work with merchandise to get the procedures standardized and meet audit requirements.



GOALS AND OUTCOMES

"... create items, medals, and material of historical interest and to cooperate with Congressional committee and federal agencies in the work of the Society and the distribution of its products."

INVENTORY

Inventory started on Thursday, June 24, 2020 (warehouse) and continued until Friday, June 25, 2020 (office).

MERCHANDISE

Write-offs of excess merchandise are complete, and Diana Wailes submitted dollar calculations to accounting. There will be a significant reduction in the stated value of inventory once we acknowledge that much of our inventory is not of sale value. While the reduction will diminish the net assets of the Society, the figure will be more realistic. Online ads are in preparation for moving inventory. We are researching avenues of distribution to programs and educational venues for excess merchandise. Bi-weekly ads highlighting seasonal products continue.

ORNAMENTS

We have three 2020 ornaments available – the commemoration of women's suffrage, the lighted metal ornament, and the traditional Marble ornament.

CATALOG

After careful analysis of the 2019 catalog, Diana decided to reduce the number of pages from 24 to 16 pages saving the Society printing cost but keeping the best-selling pages prominent. The catalog is the most significant promotional vehicle for the online store. Ornaments are our most successful catalog item, followed by marble items such as the Dome Bookends.

OFFSITE RETAIL

This year's opportunities proved that location of the event was more important than timing. One event in a House of Representatives building proved more successful in one day than four days at a prominent annual location for DC museums. This

year's opportunities may be challenged by the extended COVID-19 closings and restrictions.

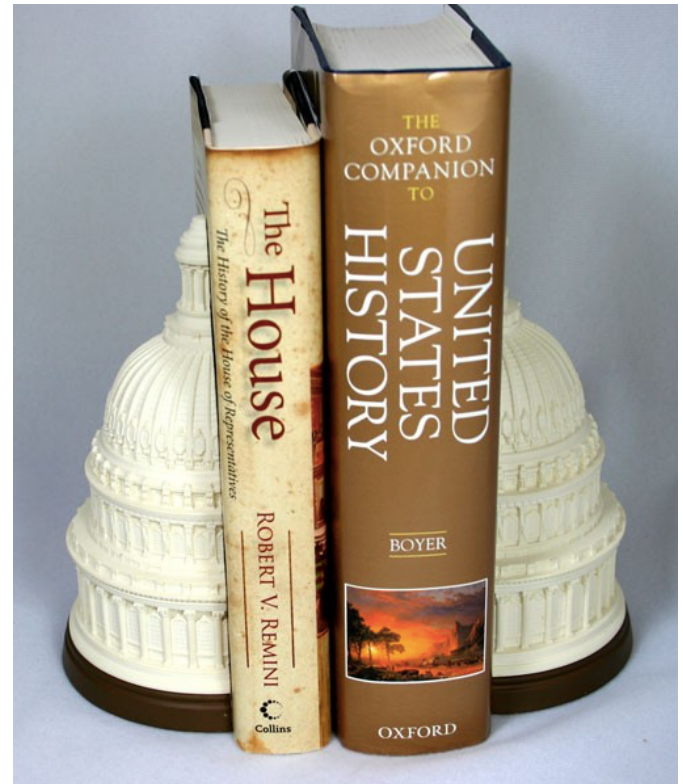
WHOLESALE

Though wholesale had been one of our strongest categories, the COVID-19 pandemic brought these promising sales to a complete halt with the closing of the CVC, Event Network, Museums, and DC Hotels losing approximate projected sales of \$193,000.



CALENDARS

The Society creates a historical calendar with high-quality images of the U.S. Capitol and daily historical facts relating to U.S. Capitol events 200 years ago. These calendars can be imprinted with the name and



contact information for Members of Congress, purchased through their office account, and mailed using the Congressional mail service once sworn-in for the new term. Historically, Members distribute between 1,000-60,000 as a way to communicate with constituents throughout the year.

Development

INCOME

CORPORATE GIVING:

Development Committee Outreach

We have started a new program that utilizes board members to contact colleagues that we have been unable to get a response from during the renewal process. Assigned organizations were based on the Capitol Committee Members activity from the January board meeting. Jennifer Romberg prepared a timeline for contacts and board members will receive an email with the contact information for the organization and information on the renewal as necessary.

INDIVIDUAL MEMBERSHIPS:

Our individual giving program, already facing significant challenges from demographic and tax code changes, now absorbs the impact of the current public health/economic crisis.

In November 2019, Vice Chair **Connie Tipton** hosted a holiday party for her Capitol Hill Friends and neighbors in collaboration with her favorite realtors. She invited our very own Steve Livengood to speak about how Capitol Hill became Capitol Hill and allowed us to invite guests to join the society and purchase our merchandise as gifts. We sold several hundred dollars of merchandise and signed up several new members.

FOUNDATION SUPPORT:

International Paper donates to *We the People* through their foundation in addition to their membership. Both gifts are included in the Corporate Giving total.

American Express donated to support the *Capitol Stories* project through their foundation. Once the new *Capitol Stories* are posted, we will ask for a renewal grant. Strategic planning included setting a clear timeline for delivery of the *Capitol Stories*.

Two new Capitol Stories -- the Churchill Speech and JFK laying in state -- were posted to the website in June, opening the opportunity to request a renewal grant in 2021. We need to determine how to best create a virtual event to promote the stories and to clearly identify them as sponsored by the American Express Foundation.

We have been in touch with the Brown Rudnick Foundation who is considering our proposal. On December 8th, 2020, they alerted us to a \$15,000 grant for the upcoming program year.

We remain in contact with the Cafritz Foundation about how we can continue the program and they indicate that they will continue their support in the Fall.

We expect a decision from an anonymous foundation and regular Society donor on a pending grant application in June 2020.

We hope that the Ben's Chili Bowl Foundation will give in June, amount unknown.

Foundation support does not cover program and financial management expense.

MEMBER FOCUSED PROGRAMS:

Volunteer and Partner Appreciation Program

Each year USCHS has a special education program and reception to celebrate all of our volunteers and key staff from other organizations who have had a role in our programs: such as CVC staff, WHHA staff, certain MOC staff, *We the People* partners, etc. About 80-90 attendees join us in late January as that is when most of our volunteers are not otherwise engaged. This year's function held on January 23 provided a sneak peek at the upcoming Statuary Hall book.

Member Appreciation Programs

These educational programs for our members vary throughout the year. In addition to special invitations to all of the Society programs, we provide special tours at other partner organizations, educational art and architecture programs in the Capitol, programs to learn about research being done by our current fellows, a tour to visit artwork and architecture highlighted in a Capitol Dome article, etc. The highlight of Q1 was the salute to Congress with Joanne Freeman.

The highlight of Q2 was the Congressional Cemetery tour. About 20-100 members attend each program, and we aim to hold a program each month.

PLANNED GIVING:

Review and Assessment completed Jan. 7, 2020 by the Sharpe Group. Below are highlights of their report:

John Jensen reviewed our records and data and developed a marketing plan for our planned giving program. He met with a few people who have long been associated with the Historical Society to best develop our marketing plan as he wanted to understand the history of USCHS, its culture, and reasons why people care about the organization and continue to stay engaged.

Review of our data provided important the demographic information that USCHS has an older, higher income, higher asset level, and higher education level of repeat donors and supporters.

His recommendations include getting to know constituents better by inquiring what is important to them, what motivates them, what family members do they have, etc.

He also recommends focusing on encouraging donors to create or update their estate plans with a soft-sell approach, focusing this as a “drip marketing” effort and not a time limited campaign, finding ways to recognize Legacy Society members and ensure this recognition continues at a personal and or public level as preferred by the donor, reviewing all of our written materials (magazines, letters, etc.) to be sure they are designed for senior eyes, and sending targeted mailings of brochures 2-4 times/year with a cover letter, reply card and reply envelope. Lastly, he advised that we don’t expect to receive a gift in less than five years. And remember that most legacy donors do not notify recipients in advance, so treat every member as if they may be a legacy donor.

Bequests

The recent COVID-19 outbreak means that we must soft-pedal the bequest marketing. We will be making information easier to find on our website by linking to the Legacy Society info on all of our emails and electronic newsletters. Most donors look for easy ways to find information about including a charity in their estate plans without notifying the charity.

We have updated the website with information like this.

Charitable Gift Annuities (CGA)

A CGA contract is an agreement between a donor and a nonprofit organization whereby the donor transfers cash or property to a charitable organization in exchange for the charity's promise to make fixed annuity payments to one or two life annuitants. Upon the annuitant's death, the remaining value of the annuity goes to charity.

Major Gifts

Laura McCulty Stepp suggests that the new CEO and new strategic plan create a good opportunity to meet with people to ask them to tell us what they like about the Historical Society. People love to give their opinion and they like to know that we care about their opinion.

Key Initiatives Committee

We have recruited three volunteers to serve on the Key Initiative Committee. Their role is to help identify and cultivate major donor prospects to provide financial support for the priorities of the Historical Society.

Each has significant history with the Historical society and is committed to our mission. They are Chuck Beck, John Cox, and Susan Fritschler.

Working with a list of about 75 prospects (based on prior giving) they selected a few individuals to meet with in order to qualify them as interested or not interested in the Society. They will work to cultivate those prospects as potential major donors by inviting them to programs, facilitating meetings with key staff and board members, etc. when it is safe to do so. These initial steps are to strengthen relationships with the potential donors.

The KIC Committee met in-person monthly but suspended operations at the outset of the pandemic.

The USCHS Fiscal Year 2020 Annual Report was compiled by Erica Colston and Grace Nielsen in December 2020.

APPENDIX A

Fiscal Year 2020 Financial Report

Statements of Financial Position June 30, 2020 and 2019

	2020	2019
Assets		
Cash and cash equivalents	\$ 727,136	\$ 512,320
Investments	2,152,499	2,416,256
Accounts receivable, net	173	68,989
Inventory	398,973	446,820
Prepaid expenses and other assets	53,974	28,918
Property and equipment, net	167,876	192,099
Total assets	\$ 3,500,631	\$ 3,665,402
Liabilities and Net Assets		
Liabilities:		
Accounts payable	\$ 77,505	\$ 92,965
Accrued expenses	159,560	124,134
Deferred revenue	1,382	-
Refundable advances	5,398	-
Deferred rent	-	3,804
Notes payable	433,105	-
Total liabilities	676,950	220,903
Commitments and contingencies (Notes 8 and 9)		
Net assets:		
Without donor restriction	2,351,044	2,792,017
With donor restriction	472,637	652,482
Total net assets	2,823,681	3,444,499
Total liabilities and net assets	\$ 3,500,631	\$ 3,665,402

Statements of Activities
Years Ended June 30, 2020 and 2019

	2020	2019
Activities without donor restriction:		
Revenue:		
Sales of merchandise	\$ 1,166,574	\$ 1,166,876
Less retail operations expenses	(1,053,369)	(1,029,099)
Less obsolete inventory expense	-	(18,707)
Net profit on sales	113,205	119,070
Other revenue:		
Contributions and grants	1,083,687	1,321,834
Investment income	73,394	140,983
Royalties and other revenue	11,135	6,048
Releases from donor restriction	589,401	605,217
Total unrestricted revenue	1,870,822	2,193,152
Expenses:		
Program services:		
Educational events and publications	1,509,958	1,717,855
Membership	135,849	131,401
Total program services	1,645,807	1,849,256
Supporting services:		
General and administrative	357,811	414,280
Fundraising	308,177	377,394
Total supporting services	665,988	791,674
Total expenses	2,311,795	2,640,930
Change in net assets without donor restrictions	(440,973)	(447,778)
Activities with donor restriction:		
Contributions	409,556	622,293
Releases from donor restriction	(589,401)	(605,217)
Change in net assets with donor restriction	(179,845)	17,076
Change in net assets	(620,818)	(430,702)
Net assets:		
Beginning	3,444,499	3,875,201
Ending	\$ 2,823,681	\$ 3,444,499

Statements of Functional Expenses
Years Ended June 30, 2020 and 2019

	2020				
	Educational Events and Publications	Membership	General and Administration	Fundraising	Total
Salaries and benefits	\$ 707,834	\$ 111,631	\$ 159,622	\$ 223,710	\$ 1,202,797
Office operations	83,801	9,883	170,172	27,088	290,944
Portrait expenses	280,732	-	-	-	280,732
Rent and utilities	139,137	11,688	20,587	37,284	208,696
Professional fees	175,851	-	-	8,167	184,018
Other expenses	61,656	2,608	6,819	8,660	79,743
Event expenses	51,695	-	70	2,938	54,703
Publication expenses	6,800	-	-	158	6,958
Travel expenses	2,452	39	541	172	3,204
	<u>\$ 1,509,958</u>	<u>\$ 135,849</u>	<u>\$ 357,811</u>	<u>\$ 308,177</u>	<u>\$ 2,311,795</u>

	2019				
	Educational Events and Publications	Membership	General and Administration	Fundraising	Total
Salaries and benefits	\$ 628,845	\$ 66,322	\$ 255,737	\$ 275,153	\$ 1,226,057
Professional fees	374,252	10,908	77,485	39,770	502,415
Portrait expenses	450,746	-	-	-	450,746
Rent and utilities	120,776	12,418	31,247	35,665	200,106
Office operations	54,789	6,740	44,050	22,873	128,452
Event expenses	34,872	20,848	3,063	102	58,885
Publication expenses	35,266	13,125	591	1,264	50,246
Travel expenses	13,687	-	-	1,013	14,700
Other expenses	4,622	1,040	2,107	1,554	9,323
	<u>\$ 1,717,855</u>	<u>\$ 131,401</u>	<u>\$ 414,280</u>	<u>\$ 377,394</u>	<u>\$ 2,640,930</u>

Statements of Cash Flow
Years Ended June 30, 2020 and 2019

	2020	2019
Cash flows from operating activities:		
Change in net assets	\$ (620,818)	\$ (430,702)
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	24,223	24,346
Bad debt (recovery) expense	(7,779)	1,134
Net loss (gain) on investments	7,132	(31,980)
Write-off of obsolete inventory	-	18,707
Deferred rent	(3,804)	(3,151)
Changes in assets and liabilities:		
(Increase) decrease in:		
Accounts receivable	76,595	166,516
Inventory	47,847	(42,867)
Prepaid expenses and other assets	(25,056)	(2,433)
Increase (decrease) in:		
Accounts payable	(15,460)	63,175
Accrued expenses	35,426	18,531
Deferred revenue	1,382	-
Refundable advances	5,398	-
Net cash used in operating activities	(474,914)	(218,724)
Cash flows from investing activities:		
Purchases of investments	(521,791)	(286,803)
Proceeds from sale of investments	778,416	373,041
Purchases of property and equipment	-	(7,211)
Net cash provided by investing activities	256,625	79,027
Cash flows from financing activities:		
Proceeds from loans	433,105	-
Net cash provided by financing activities	433,105	-
Net increase (decrease) in cash and cash equivalents	214,816	(139,697)
Cash and cash equivalents:		
Beginning	512,320	652,017
Ending	\$ 727,136	\$ 512,320

APPENDIX B

Capitol Committee Members Fiscal Year 2020

Leadership Council (\$25,000 & Up)

Bank of America*
Cigna
Grant Thornton LLP*
Johnson & Johnson
Mallinckrodt Pharmaceuticals*
PepsiCo, Inc.
PricewaterhouseCoopers
UPS

Constitution Signers (\$15,000-24,999)

Altria Client Services, LLC*
The Association for Advanced Life
Underwriting
Chevron
Comcast NBCUniversal*
CSX Corporation
Dominion Energy
Grifols
The Home Depot
National Automobile Dealers Association
Nestle USA
Norfolk Southern Company
Prudential Financial
Raytheon Technologies
Shell Oil Company
Transamerica*
Volkswagen Group of America*

Brumidi Society (\$10,000-14,999)

3M
AARP
Airlines for America
Amway
Astellas Pharma US
Corn Refiners Association Inc.
Food Industry Association
General Motors
Greenwich Biosciences
International Paper
Microsoft Corporation
National Association of Realtors
Principal
Roche Diagnostics Corporation
Salt River Project
Sanofi
Securities Industry and Financial Markets
Association
Siemens Corporation
United Airlines
Visa, Inc.

Founder Level (\$5,000-9,999)

American Institute of Architects
American Society of Civil Engineers
American Society of Mechanical Engineers
American Sugar Alliance

Founder Level (Cont.)

BASF Corporation
Mazda North America Operations
National Beer Wholesalers Association
National Corn Growers Association
National Potato Council
New York Life Insurance Company
Northwestern Mutual
Pfizer, Inc.
Phillips 66
Premium Peanut
Procter & Gamble
Texas Instruments Incorporated
Toyota Motors North America, Inc.
U.S. Bank

*Indicates Giving Above & Beyond
Minimum Listed Amount

As of June 30, 2020

APPENDIX C

2020 Board of Trustees

Officers

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*Managing Director, Washington National Tax Service,
PricewaterhouseCoopers LLP*

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*President and CEO, International Dairy Foods
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David Regan -- Treasurer

*Executive Vice President, Legislative Affairs, National
Automobile Dealers Association*

Jeanne de Cervens -- Secretary

*Vice President and Director, Federal Government
Affairs, Transamerica (Retired)*

The Honorable Jane L. Campbell

*President and CEO, United States Capitol Historical
Society*

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The Honorable Roy Blunt

United States Senate, Missouri

Jean P. Bordewich

*Program Officer for U.S. Democracy, The William and
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Kenneth Bowling, Ph.D.

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The Honorable Tom Cole

United States House of Representatives, Oklahoma

The Honorable Gerry Connolly

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Alice Valder Curran

Partner, Hogan Lovells

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American Revolution*

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Senior Editor and Correspondent, Washington Desk, NPR

The Honorable Virginia Foxx

United States House of Representatives, North Carolina

Anthony Greenberg

JBG Smith

Mary Moore Hamrick

Senior Fellow, UNC Kenan Institute for Private Enterprise

Betsy Wright Hawkings

Managing Partner, Article One Advisors

James Head

Partner, Williams Mullen

Mark Hopkins
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Relations, American Council of Life Insurers*

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*Commercial Real Estate Consultant, Keller
Williams Preferred Properties*

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*Senior Director, Government Relations,
International Paper*

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& Brokers of America, Inc.*

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Relations, Volkswagen Group of America, Inc.*

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Pharmaceuticals*

Brigadier General Tim White, PhD.
Senior Executive, The Spectrum Group

Counsel to USCHS:

Maura Molloy Grant
Hanson & Molloy

As of June 30, 2020

APPENDIX D

USCHS Staff and Contact Information

Hon. Jane L. Campbell
President/CEO

Samuel Holliday
Director of Operations & Scholarship

Steven Livengood
Chief Guide; Director of Public History

Judy Floy
Analyst

Development & Membership

Jennifer Romberg
Director of Corporate Giving

Danielle Walker
Development & Individual Giving Manager

Merchandising

LaShun Lawson
Director of Merchandising

Vincent Scott
Operations Manager

Sharron Randolph
Fulfillment Clerk

Contact the USCHS

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