



2024 Board of Directors

Executive Committee

Chair Kate Jiggins
Vice Chair Erin Betley
Treasurer Craig Whitney
Secretary Linda Tasker

Returning Board Members Incoming Board Members

Samar Khan
Elizabeth Laurent
Dennis Montagna
Scott Reynolds
Jamie Singer
Brad Upp

Jim Bevlock
Lois Cronholm
Gabriel Montoya

Departing Board Member
Kim Andrews

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Academy Building | 506 Bryn Mawr Ave. | Bala Cynwyd, PA 19004
LowerMerionHistory.org



2025 Annual Meeting Program

In 2024, the Lower Merion Historical Society made significant strides in preserving and promoting local heritage. A major achievement was the launch of a project to catalogue our collections in a publicly accessible database, under the leadership of Administrative Coordinator Paige Bartello and dedicated volunteers.

To accessibly share these resources and much more, the Society has launched a redesigned website. The new site makes it easier for members and supporters to view upcoming events, renew memberships, and make financial gifts to support the Society's mission.

Educational outreach expanded through new partnerships with local schools, while popular walking tours and public lectures continued to engage the community and highlight the rich, diverse history of Lower Merion Township.

Our Mission

The Lower Merion Historical Society is dedicated to "Preserving Our Past for the Future." We steward local history, educate the community, preserve historic resources, and reach out to promote awareness of the cultural heritage of the Township of Lower Merion and the Borough of Narberth.

2024-2026 Strategic Plan

Goal 1: Financial—To achieve financial sustainability and growth by implementing strategic budgeting, developing new policies, and optimizing resource allocation, ensuring the long-term financial health of the Lower Merion Historical Society.

Goal 2: Facilities/Collections—To enhance and preserve our facilities and collections by implementing best practices in conservation, maintenance, and accessibility, fostering a dynamic, inclusive, and engaging environment for historical exploration and education.

Goal 3: Program—To develop innovative and inclusive programming that fosters a deeper understanding and appreciation for Lower Merion and Narberth's history, culture, and heritage, engaging diverse audiences and enriching the community's cultural landscape.

Goal 4: Communications/Outreach—To expand our reach and impact through effective communication strategies and community outreach initiatives, amplifying our mission and engaging with stakeholders to cultivate meaningful connections and partnerships.

Goal 5: Membership/Advancement—To cultivate a vibrant and supportive membership community and diversify our fundraising efforts, fostering strong donor relationships, and sustainable revenue streams to support our mission.

Goal 6: Governance—To strengthen governance practices and board effectiveness by promoting transparency, accountability, and diversity, ensuring sound decision-making processes and alignment with our organizational standards and ethics.

Annual Meeting Agenda

1:30pm	Doors open	
2pm	Welcome	Kate Jiggins, Board President
2:20pm	Annual Report	Erin Betley, Board Vice President
2:30pm	New website	Erin Betley, Board Vice Chair
2:40pm	Presentation	Xandra O'Neill, Collections Intern
2:50pm	Thank you	Linda Tasker, Board President-elect
3pm	Close program	

LMHS Collections Care and Historic Jewish Congregations in Lower Merion

Xandra O'Neill, MSLS, will present a summary of her internship work at the historical society in the summer of 2024. Her work focused on inventorying and rehousing the flat file collection, researching the Jewish community in Lower Merion and creating an updated guide about Jewish life in the township, and developing a guide to using the historical society to aid in genealogical research.

She will share highlights, benefits to the community, and what's next. This project brings renewed attention to the contributions of the Jewish community to the township's cultural and religious life.

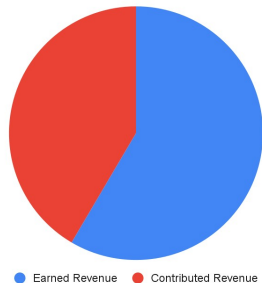




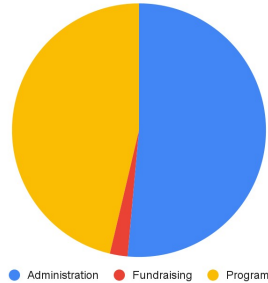
2024 Financial Report

2024 YEAR-END PROFIT & LOSS	Actual	Budgeted
REVENUE		
Earned Revenue	\$30,723	\$33,025
Contributed Revenue	\$21,830	\$10,000
TOTAL REVENUE	\$52,553	\$43,025
EXPENSES		
Administration	\$41,809	\$54,715
Fundraising	\$1,831	\$1,500
Program	\$37,646	\$21,000
TOTAL EXPENSES	\$81,286	\$77,215
PROFIT/LOSS	-\$28,733	-\$34,190

2024 Year End Revenue



2024 Year End Expense



2024 YEAR-END BALANCE SHEET

Total Beginning 2024 Bank & CD Balance	\$299,313
Total Year End 2024 Bank & CD Balance	\$270,579
Cash Increase/Decrease	-\$28,733

Unaudited December 31, 2024



2024 Annual Report

Selected Accomplishments:

Collections

Maintained a dedicated part-time Administrative Coordinator

Implemented Past Perfect collections software

8 volunteers logged over 400 hours

Inventoried rolled maps and flat files

Revised and updated the collections management policy with newly created loan, gift, temporary custody, and other collection forms

Started a collections maintenance program

Programming, Communications, & Membership

Presented 17 programs with over 1200 attendees

Published 9 issues of Milestones newsletter

Redesigned website

Attained almost 1300 Facebook followers

Governance & Finance

Developed and began implementation of 2024-2026 Strategic Plan

Received a \$5,000 grant to accession, rehouse, and catalogue the Woman's Club of Bala Cynwyd archives