

LeROY C. MERRITT HUMANITARIAN FUND
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THREE-YEAR REPORT

2003-2005

INTRODUCTION

The LeRoy C. Merritt Humanitarian Fund has seen significant growth in its corpus and its visibility since the last three-year report was issued in 2003. During the past three years, the Trustees of the Fund have made a concerted effort to engage the library community with two goals in mind:

- To ensure that all librarians who qualified for and had need for Merritt Fund assistance knew about the organization or could be readily directed to it;
- To ensure that the Merritt Fund had adequate resources to provide the needed assistance.

HIGHLIGHTS

In 2003, a group of librarians from Atlanta, whom the Merritt Fund had supported with a grant in 2002, won a settlement in their discrimination lawsuit. They showed their appreciation to the Merritt Fund by making what still stands as the largest donation to the Fund since its inception. While the Merritt Fund asks recipients to repay their grant when they are able, the Atlanta librarians repaid their grant—and then some. Their munificence has given the Trustees the ability to make larger grants in the ensuing years. Our thanks continue to go to these supporters.

Also in 2003, the Merritt Fund held its first annual fundraiser during an ALA Annual Conference. Over the past three years, these have drawn a group collection of new donors to the Fund, substantially increased the Fund's visibility, and raised thousands of dollars. Moreover, recipients of Merritt Fund grants have attended these events in order to share their stories with attendees, to put a personal face on the organization. While the Fund maintains a policy of strict confidentiality, certain recipients have very much wanted to discuss the problems they faced, to let people know that discrimination still exists, and that standing up for the principles of intellectual freedom is not risk-free.

Finally, the Trustees of the Merritt Fund have decided to make a concerted effort to open the Fund to those non-MLS library workers who work in some capacities as information professionals. They are full members of the library community and the Trustees were firm in their belief that the definition of "librarian" should be understood as broadly as possible under the guidelines of the Merritt Fund.

ABOUT THE FUND

The Merritt Fund was established in 1970 as a special trust in memory of Dr. LeRoy C. Merritt. It is devoted to the support, maintenance, medical care, and welfare of librarians who, in the Trustees' opinion, are:

- Denied employment rights or discriminated against on the basis of gender, sexual orientation, race, color, creed, age, disability, or place of national origin;
- Denied employment rights because of defense of intellectual freedom; that is, threatened with loss of employment or discharged because of their stand for the cause of intellectual freedom, including promotion of freedom of the press, freedom of speech, and the freedom of librarians to select items for their collections from all the world's written and recorded information.

The Merritt Fund is governed by a board of three trustees who are elected by donors of the Fund.

May 31, 2006

FINANCIAL REPORT

FY2003

Fund Balance: January 1, 2003: \$14,054.07

Grants distributed

1. Discrimination (\$1,000.00)
 2. Defense of Intellectual Freedom (2) (\$1,000.00)

Other expenditures

Accounting expenses, taxes, overhead (\$958.00)

Contributions

74 Members in 2003 \$3,929.00

Other income

Grant reimbursement \$800.00

Interest \$49.41

Balance as of December 31, 2003: \$15,874.48

Change in balance, FY2003 \$1,820.41

FY2004

Fund Balance: January 1, 2004: \$15,874.48

Grants Distributed

1. Discrimination (2) (\$2,500.00)
 2. Defense of Intellectual Freedom (\$500.00)

Other expenditures

Accounting expenses, bank fees, overhead (\$975.00)

Reception (\$3,213.95)

Contributions

45 Members in 2004 \$2,365.00

Other income

Interest \$70.17

Gifts and extra contributions \$13,005.00

Balance as of December 31, 2004: \$24,125.70

Change in balance, FY2004 \$8,251.22

FINANCIAL REPORT, CONT.

FY2005

Fund Balance: January 1, 2005: \$24,125.70

Grants distributed

1. Discrimination (3) (\$5,000.00)

Other expenditures

Accounting expenses, bank fees, overhead (\$1,044.20)

Reception (\$2,080.65)

Contributions

99 Members in 2005 \$5,442.00

Other income

Interest and extra contributions \$595.86

Balance as of December 31, 2005: \$22,038.71

Change in balance, FY2005 (\$2,086.99)

Total expenditures, 2003-2005

9 Grants \$10,000.00

Other expenditures \$8,271.80

TOTAL \$18,271.80

Total income, 2003-2005

Contributions

218 Member donations \$11,736.00

1 Reimbursement \$800.00

Interest \$363.44

Gifts/Extra contributions \$13,357.00

TOTAL \$26,256.44

Change in balance, 1/1/2003-12/31/2005 \$7,984.64

MERRITT FUND TRUSTEES, 1970–2006

* indicates Senior Trustee

1970–1975	Alex Allain
1975–1976	Joan B. Goddard, Zoia Horn, Joslyn N. Williams
1976–1977	Zoia Horn, Joan Goddard, Betty Carol Sellan (Elected)
1977–1978	Joan Goddard*, Betty Carol Sellan, Joan Marshall (Elected)
1978–1979	Betty Carol Sellen*, Joan Marshall, Diane Kadanoff (Elected)
1979–1980	Joan Marshall*, Diane Kadanoff, Suzanne LeBarron (Elected)
1980–1981	Diane Kadanoff*, Suzanne LeBarron, Janet Freedman (Elected)
1981–1982	Suzanne LeBarron*, Janet Freedman, Michele Leber (Elected)
1982–1983	Janet Freedman*, Michele Leber, James McCoy (Elected)
1983–1984	Michele Leber*, James McCoy, Emalee Philpott (Elected)
1984–1985	James McCoy*, Emalee Philpott, Susan Vaughn (Elected)
1985–1986	James McCoy*, Emalee Durbin, Susan Vaughn
1986–1987	Emalee Durbin*, Susan Vaughn, Miriam Crawford (Elected)
1987–1988	Susan Vaughn*, Miriam Crawford
1988–1989	Miriam Crawford*, Ginny Moore Kruse (2 yr. term), Esther Helfand (3 yr. term)
1989–1990	Ginny Moore Kruse*, Esther Helfand, Rita Auerbach (Elected)
1990–1991	Esther Helfand*, Rita Auerbach, Christine Jenkins (Elected)
1991–1992	Rita Auerbach*, Christine Jenkins, Sarah Pritchard (Elected)
1992–1993	Christine Jenkins*, Sarah Pritchard, Sherrie Bergman (Elected)
1993–1994	Sarah Pritchard*, Sherrie Bergman, Nancy Magnuson (Elected)
1994–1995	Sherrie Bergman*, Nancy Magnuson, Mimi Davis (Elected)
1995–1996	Nancy Magnuson*, Mimi Davis, Kay Ann Cassell (Elected)
1996–1997	Mimi Davis*, Kay Ann Cassell, Bernadine Abbott Hoduski (Elected)
1997–1998	Kay Ann Cassell*, Bernadine Abbott Hoduski, Pamela Bonnell (Elected)
1998–1999	Bernadine Abbott Hoduski*, Pamela Bonnell, Deborah Jacobs (Elected)
1999–2000	Pamela Bonnell*, Deborah Jacobs, David Cohen (Elected)
2000–2001	Deborah Jacobs*, David Cohen, June Garcia (Elected)
2001–2002	David Cohen*, June Garcia, Francis Buckley, Jr. (Elected)
2002–2003	June Garcia*, Francis Buckley, Jr., Virginia Moore (Elected)
2003–2004	Francis Buckley, Jr.*, Virginia Moore, Mary Elizabeth (Ma'lis) Wendt (Elected)
2004–2005	Virginia Moore*, Mary Elizabeth (Ma'lis) Wendt, James Kuhn (Elected)
2005–2006	Mary Elizabeth (Ma'lis) Wendt*, James Kuhn, Lucille C. Thomas (Elected)