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)
1978–1979  Betty Carol Sellen*, Joan Marshall, Diane Kadanoff (Elected)
1983–1984  Michele Leber*, James McCoy, Emalee Philpott (Elected)
1984–1985  James McCoy*, Emalee Philpott, Susan Vaughn (Elected)
1986–1987  Emalee Durbin*, Susan Vaughn, Miriam Crawford (Elected)
1987–1988  Susan Vaughn*, Miriam Crawford
1989–1990  Ginny Moore Kruse*, Esther Helfand, Rita Auerbach (Elected)
1990–1991  Esther Helfand*, Rita Auerbach, Christine Jenkins (Elected)
1994–1995  Sherrie Bergman*, Nancy Magnuson, Mimi Davis (Elected)
1999–2000  Pamela Bonnell*, Deborah Jacobs, David Cohen (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)