

# ANNUAL REPORT 2023



LANIER LIBRARY

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MORE THAN EXPECTED



# Letter from the President

January is named for the Roman god Janus who had two faces - one looking back and the other looking forward. And January is the time we look back on what happened in the library in 2023 and, like Janus, also look forward as to how 2024 will unfold. But for this report, I will primarily address the milestones of 2023.

It was another busy year for the Library. We settled on the sale of the bookstore building in February. This bequest from longtime member, Harry Goodheart, allowed us to continue to deal with maintenance issues on the Library property. Other milestones included a number of improvements to the building, a full schedule of in-person programs, a board review of how our endowment is managed, and new ways to appreciate our members.

An unexpected and quite major maintenance problem surfaced when we realized that the retaining wall holding up the parking lot had developed significant stress cracks and needed extensive and immediate repairs. We hired a structural engineer to assess the problem and make a recommendation on how to proceed. Then, we contacted three companies specializing in this type of work and received three bids for the proposed repairs. After careful review, we selected the low bid from Mount Valley Foundation Repair, and contracted for the work which was completed this past fall. The final piece of the project was to patch the trench in the parking lot before winter rains and we were able to get this done before the paving companies closed for the winter. Separately, we continued to work on making improvements to the Library building. East-facing windows in the fiction room were tinted with UV-protective film, chairs in the periodical room were refurbished, and thanks to two of our talented members who are true craftsmen, "BOB" the giraffe was replaced (thank you, Karl Schwartz) and a new podium was built (thank you, Fred Herres)! Behind the scenes, we upgraded the library's wifi and phone systems and made some necessary electrical repairs.

We offered a number of in-person programs throughout the year including a talk by best-selling author, Elizabeth Kostova, who presented the Library with a volume from her grandfather's collection - a signed vintage biography of Sidney Lanier. We co-sponsored a community-wide "Gardening for Life" program featuring well-known naturalist, Doug Tallamy. Monthly programs at the Library focused on nature and other topics as diverse as WWII history, poetry, local lore, and science fiction. Thanks to the Kirby Endowment Fund at the Polk County Community Foundation (PCCF), we were able to offer a repeat of the popular Holiday Greenery workshop and another hands-on

workshop in which participants learned to create artwork using alcohol ink. These workshops were well-attended, fun and, like our other programs, free to the community. We increased the number of opportunities for our members to gather and socialize, as a way to show our appreciation for members' support.

Our financials are in good shape as you will see from the Treasurer's Report below. This is due in large part by keeping our expenses under budget, but has also been helped by the revenue generated by the bequests we have received. These generous bequests continue to help us to catch up on many much needed repairs and upgrades and are examples of how important planned giving can be to the success of the Library. Additionally, our members once again exceeded expectations in response to our once a year request for Annual Giving. Another big part of our ongoing fiscal health can be attributed to the Local Commitment Grant from PCCF, as well as funding from the Felburn and the Forbes Foundations.

One of the most important aspects of 2023 was our ability to appreciate and reward our wonderful staff. PCCF helped us in this regard by renewing the funding for another three-year term for the SEP-IRAs established for their benefit. Our staff create the warm and welcoming atmosphere in the Library. As members, we receive personalized service: the staff know our individual tastes and make recommendations to help us find stimulating, entertaining material in the library collection.

Finally, and probably most importantly, our Library is truly a community that fosters friendship, neighborliness, and intellectual stimulation underscored by a love of reading and books. We are blessed with a knowledgeable and caring staff, an active and engaged board, and a membership of remarkably talented and giving individuals.

Looking forward to 2024, we hope to continue to be a safe and welcoming center for our community, and to offer intellectual stimulation through a wide range of programs and activities.

Respectfully submitted,

Vicky Jackson  
President





# Treasurer's Report

Lanier Library's finances remained solid during 2023. A strong yearend Annual Fund drive, institutional support from the Polk County Community Foundation and the Felburn Foundation, among others, and legacy distributions from the James and Hertha Flack bequest and the Earl and Lillian Bettinger bequest allowed us to meet all ongoing operating expenses.

Were it not for the Board's prudent decision to reinforce our rear retaining wall this fall, operations would have produced a modest gain instead of a slight loss. The sale of Harry Goodheart's former bookstore (which he bequeathed to the Library upon his death in 2020), together with a strong yearend rally in the stock market, also increased our endowment, which we have not had to tap now for the past three years. In 2023 the Board also engaged a professional advisor, Modera Wealth Management, to ensure that we are prudently managing our endowment. With their help, and the support of our individual and institutional supporters, we should be positioned to carry out our mission for another 133 years. Thanks, as always, to all who contributed, whether it was their time, energy, or financial resources this past year. Financial statements and the Library's most recent federal tax return are available upon request at the Library.

Timothy J. Boyce, Treasurer

Revenues	2021	2022	2023
Member driven	\$84,222	\$82,492	\$76,069
Bequests	\$103,100	\$99,030	\$51,900
Grants	\$144,958	\$153,777	\$90,813
Other	\$17,637	\$6,670	\$2,881
Total	\$349,917	\$341,969	\$221,663
Expenses	2021	2022	2023
Personnel	\$97,054	\$108,949	\$112,306
Books/other media	\$15,830	\$17,123	\$18,412
Facilities	\$23,554	\$16,451	\$18,292
Capital items: (Wall, etc.)	\$63,315	\$37,988	\$50,364
Professional	\$4,500	\$11,625	\$4,783
General/Admin	\$35,708	\$34,363	\$29,520
Total	\$239,961	\$225,499	\$233,677
<b>Net Gain (Loss)</b>	<b>\$109,956</b>	<b>\$115,470</b>	<b>(\$12,014)</b>



## Legacy Fund

Established by the Board in 2020, the Lanier Legacy Fund honors the generosity of members who included the library in their estate plans with a gift of \$25,000 or more. We hope others will emulate this generous example and include Lanier Library in their estate plans. There is great satisfaction in having even a small part in providing future generations access to life-changing resources and experiences.

Tom Ervin, Board Vice President, Development Chair



# Thanks to Donors

## Foundation and Corporate Support

Bernard G. Drummond Charitable  
Fund at the Polk County  
Community Foundation  
Lillian and Earl Bettinger  
Charitable Trust

Dixie and Harry Evans Charitable  
Endowment Fund at the Polk  
County Community Foundation  
The Felburn Foundation

The Stuart and Margaret L. Forbes  
Foundation, Inc.  
Margaret Howe Trust  
Peggy Pearlstone Foundation

The Plume Family Foundation  
The Polk County Community  
Foundation  
Rogers-Haynes Fund at the Polk  
County Community Foundation

## Honorary and Memorial Gifts

Jonathan Armour in honor of  
David and Frances Maxwell  
Sarah Bedford in memory of  
William Woody and  
in honor of his children  
and grandchildren

Robert and Judy Bolton  
in memory of Rachael Gould

Tim and Lucy Brannon in memory  
of William Woody

Mary Florence Brown in memory  
of Rachael Gould

Amanda Carcaterra in memory of  
William Woody

Richard Diming in memory of  
William Woody

Norb and Dawn Donnersbach in  
memory of William Woody

Greg and Laura Kerhulas Giese in  
memory of William Woody

Victoria Gordon in memory of  
William Woody

Mitchell and Robbie Hambright in  
memory of Rachael Gould

Andy and Linda Haynes in  
memory of William Woody

Michael Kilbourne in memory of  
Rachael Gould

William Klaus in memory of  
William Woody

Rita Landrum in memory of  
Rachael Gould

Alan and Mary Beth Lyles in  
memory of William Woody

John and Gail Macdonald in  
memory of Rachael Gould

Moder Wealth Management in  
memory of Rachael Gould

Joan Post in memory of  
Rachael Gould

Sally Ruffin in memory of  
Rachael Gould

Alan and Kate Sanzenbacher in  
memory of William Woody

Gisette Soffer in memory of  
William Woody

Jim and Peggy Stallworth in  
memory of William Woody

Gloria Underwood in memory of  
Rachael Gould

Mary Walker in memory of  
William Woody

CeeCee Willmanns in memory of  
William Woody

## Lanier \$2500 and up

Tom Ervin and Kathryn Williams

## Shakespeare \$750 to \$999

Peter Franklin and Greg Wright

Andy and Linda Haynes

Beth Kinstler

Bob and Susan Penfold

## Austen \$1,000 to \$2,499

Anonymous (3)

Tim and Tara Boyce

Virginia Clark

Graham Ervin

Jay and Lisa Grobowsky

Alex and Barbara Hagerty

Nancy Holmes

Tom and Vicky Jackson

R. Michael and Paula Jordan

Rita Landrum

Louise Little

David and Frances Maxwell

Richard McHenry

Delia Owens

Wayne and Clara Rogers

Sarah Schroth

## Dickens \$500 to \$749

Cindy Caldwell

Larry and Janice Elder

Ellis and Linda Fincher

Derek Harrison

Fred and Pam Herres

Bill Latham

and Martha Strawn

Sandra Miller

Olin Sansbury

and Mary Ann Claud

Mary Sasser

Larry Siler and Vicky Grant

Loti Woods and Dale Weiler

## Twain \$250 to \$499

Anonymous (2)

Patsy Baker

Dick Belthoff

Robert and Judy Bolton

John and Cindy Boyle

Tim and Lucy Brannon

Jack Carlock and Jane Darby

Philip and Ann Cotton

Bernard and Linda Eiserloh

Bryan and Kasey France

Pat Gass

Bob and Dottie George

Janet Glancy and Hugh Snively

Gordon and Kathleen Hamilton

Ted and Nancy Hiley

Jim and Charlotte Holly

Maryneal Jones

Steve and Marie King

Chad and Jenny Lawson

Bill and Becky McCall

Brian and Betsy McCrodden

Jim McDermott

Rick and Eileen Mehta

Barb Oklesen

Jen Owens

Alan and Diana Ramsay

Lois Tirre

Vince and Gloria Verrecchio



List reflects donors from  
1/1/2023 to 12/31/2023.



# Thanks to Donors

## Dickinson \$100 to \$249

Anonymous (4)  
Chris and Carole Bartol  
Alan and Norma Batchelder  
Sally Brotton and Les Barra  
Dorothea Brown  
Tom and Donna Brown  
Erik and Eleanor Bundy  
Jackie Burke  
Grant and Julie Burns  
Dick and Fran Callaway  
Donnie Carruth  
Jeff and Sherry Carter  
Rebecca Collins  
Eleanor Cox  
David and Lee Cudlip  
Connie Culpepper  
and Tom Brittingham  
John and Mary Lou Diekmann  
Jane Domboski and Amy Arledge

Kelly Eppic  
Shields and Frances Flynn  
Shelvie Foust  
Henry and Margaret Freeman  
Tom and Angie French  
Chris and Fran Hawk  
Tom and Lucy Henner  
David and Joanie Hosick  
Mike and Linda Hovis  
Kristin Hylland  
Joe and Betty Jackan  
Larry and Margaret Jolly  
Amber Keeran and Jeff Jenkins  
Carl and Beth Kelley  
Ted and Zoe Kharpertian  
Glenn and Sabra Kleinau  
Joyce Lamb  
Scott and Gayle Lane  
Cam Lawrence and Stan Gibson

Bill and Kimberly Lee  
Martha Lott  
Linda Lovelace  
Paul and Virginia Maclure  
Wanda May  
Gordon and Julie McClung  
Bobbie McNutt  
Carol Meeske  
Bill and Sharon Mitchell  
Suzanne Monroe  
Bob and Lynn Montgomery  
Liz Mossina  
Gunnar Ostergaard  
Beverly Ozmon  
William Peavey  
Kevin and Laura Peek  
Alan Peoples  
Bertie Phayer  
Samuel and Eva Pratt

Allan and Jenny Purtil  
Bets Radley  
and Lawrence Orłowski  
Ellen Reichenbach  
Jack and Doris Saunders  
Peter and Martha Shanahan  
William and Jennifer Shand  
David and Patricia Slater  
Keith and Beth Spring  
Jim and Christine Tapley  
Delia Tittle  
Jonathan and Sommer Trebilco  
Tom and Patti Trobaugh  
Mary Walker  
David and Gail Wesson  
Sandra Whatley  
Jacqueline Williams  
Peggy Wyllie

## Other Gifts

Anonymous  
Larry and Gretchen Boyd  
Claire Carey  
Terry Catalano  
Beth Child  
Lili Corbus and Madison Geer  
Jeannie Evans  
Anne Fitz  
Jacque Headden  
Hugh and Sally Hursey

Stephanie Kaneps  
Karen Killough  
Diane Kinoshita  
Jerry and Dottie Lasco  
Donna Macy  
Charles Magee  
Art Marquis  
Ann McAndrews  
Joan McKeown  
Perry and Eilene Morgan

Claire Nettles  
Clare O'Sheel  
Carroll Rush  
Jean Shumway  
Alison Stitzer  
Zia Terhune  
Judy Thompson  
Bradford Whitney  
Donna Wise

## Gifts in Kind

Tom Ervin and Kathryn Williams  
Fred Herres  
Gene Parks  
Laura Peek  
Karl Schwartz  
Vince Verrecchio  
Donna Wise



*List reflects donors from  
1/1/2023 to 12/31/2023.*



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These programs and more

## Acquisitions and Members' Top 10



Total print media acquisitions for 2023: 626 (fiction 420, non-fiction 52, large print 18, mystery 64, biography 48, Felburn Nature/Wildlife 12, juvenile 8, young adult 4). DVDs 124, CDs 26. Featured here are the top ten books checked out in 2023. Perhaps you are one of the members who helped propel these to the top of the list. Or, maybe you want to check out what you haven't read yet.



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