



2017 IMPACT REPORT

FROM THE FOUNDATION DIRECTOR:

The Houston Public Library Foundation is on a path leading to a bright future. Our mission supporting the Houston Public Library links sustaining partners and incomparable new donors to innovative and essential community programs. Throughout our 2017 Impact Report, you will see amazing progress that could only be achieved through a unified focus of committed humanitarians. This report is dedicated to those caring individuals, community-focused foundations, industry leaders, and elected officials who share our belief that the Houston Public Library is leading economic, educational, civic and social opportunities for learning and human interaction.

My sincere thanks for your leadership and partnership.



Sally Swanson

Sally Swanson
Executive Director



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A Year of Discovery and New Relationships

BOARD CHAIRPERSON, LICIA A. GREEN-ELLIS



HPL's Mobile Express

As we culminate our tenth anniversary, the Foundation has a renewed focus on serving the needs of the community through the programs and services offered through the Houston Public Library. During last year's annual meeting, you heard how the Houston Public Library Foundation embarked upon a new era, and this year, our growth mindset is maturing into significant successes.

The 2017 Impact Report presents our organizational accomplishments. Key performance indicators increased in every category and aligned with four primary organizational goals:

- Goal #1:** Establish business excellence.
- Goal #2:** Increase awareness and community support.
- Goal #3:** Build and sustain strong relationships.
- Goal #4:** Raise donations for financial independence and programmatic support.

A thorough review of internal processes and documenting new ways of work led to risk mitigation practices and affirmed that our redefined business processes align with nonprofit organizational excellence standards. **This essential work led to receiving the Better Business Bureau's Accredited Charity and GuideStar's Gold Star Charity ratings.**

Increased awareness and community support begins with effective messaging. The Foundation partnered with HTV and CBS Radio to create



Barbara Bush Literacy Plaza Kickoff Event

energy and support in the broader community and directed the public's interest to the relaunched houstonlibraryfoundation.org with an annual total of over 134,000 online visits by 16,085 visitors. The dynamic content engages the public and converts interest into support for the Library's key initiatives. Online links connect to our current financial documents, organizational leadership, advocacy, upcoming events, and ways to give. Social media and new campaign videos on YouTube, engage a broader audience in support of the Library.

Just as the Houston Public Library continues to evolve to meet the needs of the community, the Foundation must be innovative and connect community visionaries to this dynamic mission.

The Foundation's goal to build and sustain strong relationships embraced mission alignment and community focus. The initiatives brought diverse organizations together to achieve bold goals. The collaborative mindset and mutually shared values created synergy around significant projects, and in November 2016, Mrs. Barbara Bush accepted our proposal to have the library plaza named in her honor. The Barbara Bush Literacy Plaza will be the physical focal point for literacy in Houston. HPL is excited to extend program opportunities outdoors, and the features will include a children's reading garden, an adult reading garden, a performance stage, puppet theater, café, lounge, dining areas, and art lawn. Phase One of the construction concluded this fiscal year, and the #1 priority of the Foundation is completing the \$5.5 million fundraising plan for Phase Two.



Barbara Bush Literacy Plaza

Financial integrity is essential, and the Foundation continues to raise and allocate funds in accordance with GAAP (generally accepted accounting principles) nonprofit standards. The independent audit firm, Carr, Riggs & Ingram, presented a “clean” financial opinion once again this year.

The positive change in fundraising revenue rose from \$383,147 in FY 16 to \$2,094,273 in FY 17.

Fundraising for the Barbara Bush Literacy Plaza and the inaugural Beyond the Page Luncheon were the two primary sources of the 547% increase.

Beyond the Page, the Foundation’s Annual Benefit Luncheon, aims to raise awareness of issues that transcend the written word and go *Beyond the Page* to make a positive impact on society. Best-selling author, Rebecca Skloot, shared the hidden truths about the life, death, and ultimate “immortality” of a poor black tobacco farmer. *The Immortal Life of Henrietta Lacks* chronicled the struggles surrounding race, class, and bioethics in America.

The Library’s endowments showed growth in the Vanguard investments. The calculation for the fiscal year 2017 annual endowment allocation to HPL is based upon a formula of the average balance of the preceding 12 quarters. **The Board of Directors approved a \$930,000 annual endowment allocation.**

HPLF’s growth mindset will lead HPLF into a strong financial position that not only increases funding for essential library programs but also values strong partnerships within the community. Our



Best-selling author Rebecca Skloot and award-winning journalist Melanie Lawson

integrated culture of philanthropy engages all partners as an essential member contributing to mission delivery. An integral piece of this work is to create top of mind recognition in the community from the combined and common purpose of the Foundation, and its component program, Friends of HPL. The combined and unified organization builds upon respective strengths while creating operational efficiencies.

We are entering our second decade with a clarity of purpose as to how we achieve our unified mission. The Friends focus on engaging the community in library initiatives primarily through the resale of “weeded” library books while the Foundation seeks out donations and establishes community-level partnerships. Together, we have unified our synergistic efforts to better deliver upon our linked mission as a single organization; the results are increased financial and programmatic resources that HPL uses to deliver programs throughout the community.

Success is most easily described by numbers, **yet true success is embedded in the way library programs change lives.** A real Impact Report is a compilation of stories of how our neighbors’ lives are enriched through library programs. We couldn’t do this vital work without you. Thank you for being part of our 2017 success story!

Licia A. Green-Ellis
Chairperson

The State of the Library

LIBRARY DIRECTOR, RHEA BROWN LAWSON, PH.D.

One of the things I know for sure is - the Houston Public Library (HPL), like public libraries across the nation and across the globe, remains vital and important in the lives of many people.

For thousands in our city, HPL continues to serve as a civic and cultural gathering space, a place for workforce preparedness and educational support, a safe place, and a center of community life. In our rapidly paced world of constant technological, environmental, political and societal changes, the library is a place where one can still find expert assistance and devoted, one-on-one human interaction. And, I am most proud that HPL is also a place where people can explore, dream, and reach for their aspirations with the plethora of tools and resources our libraries make free and accessible to them.

2016-1017 Service Highlights

This year we re-opened three renovated libraries (Henington-Alief, Jungman, and Stimley-Blue Ridge), and one new library (Young) across the city. The openings of these libraries were eagerly awaited by their surrounding communities and have been soaring in use since their grand openings. While each of the libraries are fabulous and well used, the new Young Neighborhood Library has been especially embraced by its community. The new state-of-the art building emulates the absolute best that HPL has to offer. We listened carefully and worked closely with community members to conceptualize and develop the vision for this location, including the exciting selection of services and programs and popular materials. This collaboration with the community, the Mayor's office, the Council Members Office, and the General Services Department has produced our most beautiful and vibrant library in the City of Houston. **We've had 70,000 customers walk through Young Library's doors within a 9-month period, a 48% increase in visitors over last year in the same time period.** It proves that by working together, we can achieve anything beyond expectations.



Learning Link Launch

In collaboration with our partners at the Houston Public Library Foundation, we enjoyed one of the best highlights of the year — the groundbreaking for the renovation of the Barbara Bush Literacy Plaza. We are so very fortunate to have former First Lady Barbara Bush lend her name to the plaza and make a substantial gift. Once the Plaza is completed, it will quickly become a premier downtown destination for people of all ages to enjoy.

In September 2016, we launched the Learning Link in collaboration with Houston Independent School District, Mayor Sylvester Turner, and H-E-B. **The Learning Link provides 230,000 students a library year-round while enrolled in school.** When libraries and schools come together, everyone wins. Libraries foster curiosity and a love of reading, and provide innovative tools to spark exploration and learning during and beyond school hours. This collaboration is designed to open doors to expanded opportunities for our children and provide skills that will last a lifetime cultivating them into successful and engaged adults of tomorrow. Teachers and students are excited about this program as they are able to access our online resources at anytime, anywhere.

Students were able to use their Learning Link accounts to participate in this year's John P. McGovern Summer Reading Program.

Harvey Update from Dr. Lawson

At the time of this writing, the City of Houston was just three weeks past Hurricane Harvey. The ways in which residents of our city embraced HPL as we restored services in the aftermath of our nation's most catastrophic and disastrous storm, confirmed that our library serves as a strong community anchor and a place to help restore normalcy.

I am so proud of how quickly the HPL team came together - even as they dealt with their own post storm problems - to open as many libraries as we could.

Within two weeks, 21 of our libraries (half of our 42 locations) were open. It was important that HPL was there - locally accessible in communities - offering much needed one-on-one assistance, access to Wi-Fi and computers, and a quiet space so that people could reflect or escape from the chaos for a moment. The library's array of services and programs helped bring the joy back in the eyes of our neighbors after having witnessed so much devastation and uncertainty.

We assisted in the City's post hurricane recovery efforts by providing free child care for first responders and other City of Houston employees for two weeks while the surrounding school systems were closed. This support alleviated worry about child care as our colleagues returned to work. In addition, we provided space for two city departments while their buildings were being repaired after being damaged by the storm.

The Hot Spots were an incredible asset immediately after Hurricane Harvey devastated the Houston area. We loaned Hot Spots and laptops to the George R. Brown Convention Center, which was being used as a shelter. Having access to technology is imperative to beginning the recovery process after a disaster. Providing these items enabled storm victims to complete online forms and applications for post-storm assistance.

Two weeks after Harvey the Aspen Institute and HPL convened some of Houston's most critical thinkers to facilitate a conversation about leveraging community resources to help the city and its citizens after an event like Hurricane Harvey. The two-hour dialogue was productive and very encouraging, not to mention inspiring to have so many thought leaders willing to discuss how to work together to help move the city forward. There are concrete plans to continue the conversation. I was proud how remarkably well the Houston Public Library served as the convener in the community around major issues.



Young Neighborhood Library Opening

This year has been the program's best year yet with over 25,000 participants including 4,000 adults for the Summer Reading for Grown-Ups series.

We were excited to launch the Hot Spot initiative at select locations early 2017. Hot Spots provide customers free unlimited Wi-Fi access on multiple devices anywhere they may go — at home, at a restaurant, in the park and even on a bus. The initiative took off! The demand for Hot Spots became so great that we launched this service at additional locations.

The Aspen Institute Dialogue on Public Libraries selected the Houston Public Library as the site for their next dialogue. The Aspen Institute is an amazing think-tank that gathers the brightest and most forward-thinking minds to address and create impactful answers and actions for some of the world's most complex problems. HPL is very honored to be selected and excited to be part of the discussion on strategic and collaborative opportunities for public libraries and their changing roles in communities and the nation.

I am pleased to report that the state of the Houston Public Library is good. In fact, we are Houston Strong.

Dr. Rhea Brown Lawson
Houston Public Library

Education *Fundamentals*



Learning Link

Being the most diverse city in the nation, and the 4th largest, our relationship with the Houston Independent School District (HISD) is essential. HISD is the 7th largest public school system in the nation, and the largest in Texas, serving more than 215,000 students. This past year, the Houston Public Library and HISD served those students through an innovative and essential program, **The Learning Link**, which ensured that every student had access to the library's resources, creating an extension of tools for success. Even more incredible was that the student's ID serves as their library card, streamlining the connectivity of students to resources.

Experiencing History at the Gregory School

The collaboration between HISD and African American Library at the Gregory School (Gregory School), provides new field trip opportunities for HISD students, and encourages more teachers and students to visit the Gregory School.

The Gregory School serves primarily as an archival library tasked with preserving and celebrating the history of African Americans in Houston and surrounding areas. The Gregory School is also a museum, meeting space, and event location.

The first floor consists of a restoration of an early 20th century classroom, an exhibit space, and several galleries that depict the history of Houston through the experiences of African Americans. Knowing that the classroom, galleries, and exhibit space are powerful educational tools, the Gregory School commenced the HISD tours in September 2016. The pilot year served 4th and 5th graders from a selection of area schools.

During the tours, students asked questions about the artifacts, photographs, and informative pieces they saw. One of the most important takeaways was connecting students' lives and local history. Many students recognized photos of Booker T. Washington High School or Jack Yates High School as the alma mater of their parents and grandparents. Others were astonished to learn about African American doctors, entrepreneurs, artists, and politicians from their hometown.



Gregory Elementary School Class Photograph from 1948

***"We are not only here to serve researchers,
but also to help teach young Houstonians about their city."***

Danielle Burns Wilson, Curator and Manager, African American Library at the Gregory School

For the academic year of 2016-2017, **832 students** from **12 elementary schools** visited the Gregory School as a part of this collaboration. This unique learning experience fulfilled Texas history curriculum requirements and connected the community in new and meaningful ways.

Here, There, HPL is Everywhere



Outreach Wheels in Motion

In FY17, HPL's Community Engagement Team staffed a total of **826 events**, served **305 organizations**, gave **448 programs**, made direct contact with over **21,000 people in 60 zip codes**, through their mobile outreach units.

The HPL Community Engagement mobile units serve as the outreach service arm to customers throughout the City of Houston and surrounding areas while targeting the under-served. The mobile units provide creative outlets, technological accessibility, ranging from providing Improv Puppet Theater, to a Literacy HUB where customers can check out and return books, gaming experiences, internet connection, and digital literacy workshops.

Serviced areas in fiscal year 2017.

Houston Public Library Service Statistics



1,306,822

Registered MY Link Cardholders



5,703,152

Collection in Circulation



8,147,728

Total online and in-person visitors



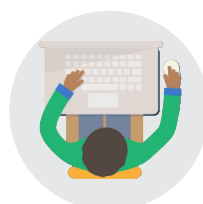
30,553,457

Wi-Fi Sessions



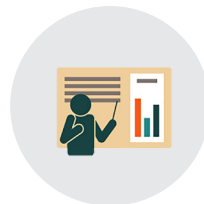
337,062

Students served through programs



847,544

Computer Users



90,186

Meetings held at library locations by community groups



32,769

Workforce Literacy Class Attendees

CLOSURES

Robinson-Westchase, Blue Ridge, Collier, Scenic Woods

Partners in Literacy



Houston Astros Foundation

In 2017, the Library Foundation started a partnership with the Houston Astros Foundation. In the late Spring, the Astros Foundation reached out to the Library with the idea of a literacy bus, and, since then, communications with their team have been synergistic. The heart of both initiatives, Books at the Ballpark and the Library's Summer Reading Program met the same mission – empowering youth success through literacy strategies and resources.

The Astros Foundation expanded marketing and outreach efforts on behalf of the Library and the mission of the Foundation. Their support has been vast, expanding across the Summer Reading Program and the Foundation's first Annual Luncheon.

Barbara Bush Houston Literacy Foundation

A champion of literacy, and longtime collaborator, the Barbara Bush Houston Literacy Foundation (BBHLF), continues to support the great work of the Library and has expanded its support of two program favorites – The John P. McGovern Summer Reading Program and the new initiative, Groomed for Literacy.

As one of the super connectors of literacy in Houston, they are integral to the success of our collective literacy efforts, bringing together diverse groups, to make the most significant impact in our community. Their team has supported the Friends of HPL's volunteering efforts, by providing an intuitive volunteer management platform, Connect4Literacy to reach new library and literacy advocates.



We thank our collaborators and in-kind partners of fiscal year 2017.

Partnerships take many forms. Special thanks to the following organizations and companies for their in-kind support of HPL and Foundation programs and events.

Alley Theatre

Barbara Bush Houston Literacy Foundation

Children's Museum of Houston

Chipotle Mexican Grill, Inc

H-E-B

Hermann Park Conservancy

Houston Astros Foundation

Houston Chronicle

Raising Cane's Chicken Fingers

Rice University



University of Houston-Downtown

This past year we created a new collaboration with University of Houston Downtown. The UH-D Department of Urban Education has supported the Barbara Bush Literacy Plaza campaign and events, and hosted a Readathon at our International Literacy Celebration and Friends Book Sale. The commitment to education, literacy, and public service from UH-D will support library and literacy efforts for years to come.

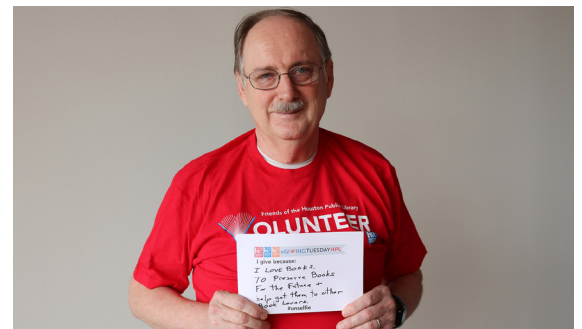
Friends of the Houston Public Library

The Friends of the Houston Public Library (Friends) is a program of the Foundation. In a given year, the Friends process nearly 800,000 books, from weeded library books and community donations. These books are then sold, upcycled or recycled and turned into vital library programming.

Individual volunteers and volunteer groups are the driving force behind processing the hundreds of thousands of books. Through their commitment, the Friends sells low cost books that can create home or classroom libraries.

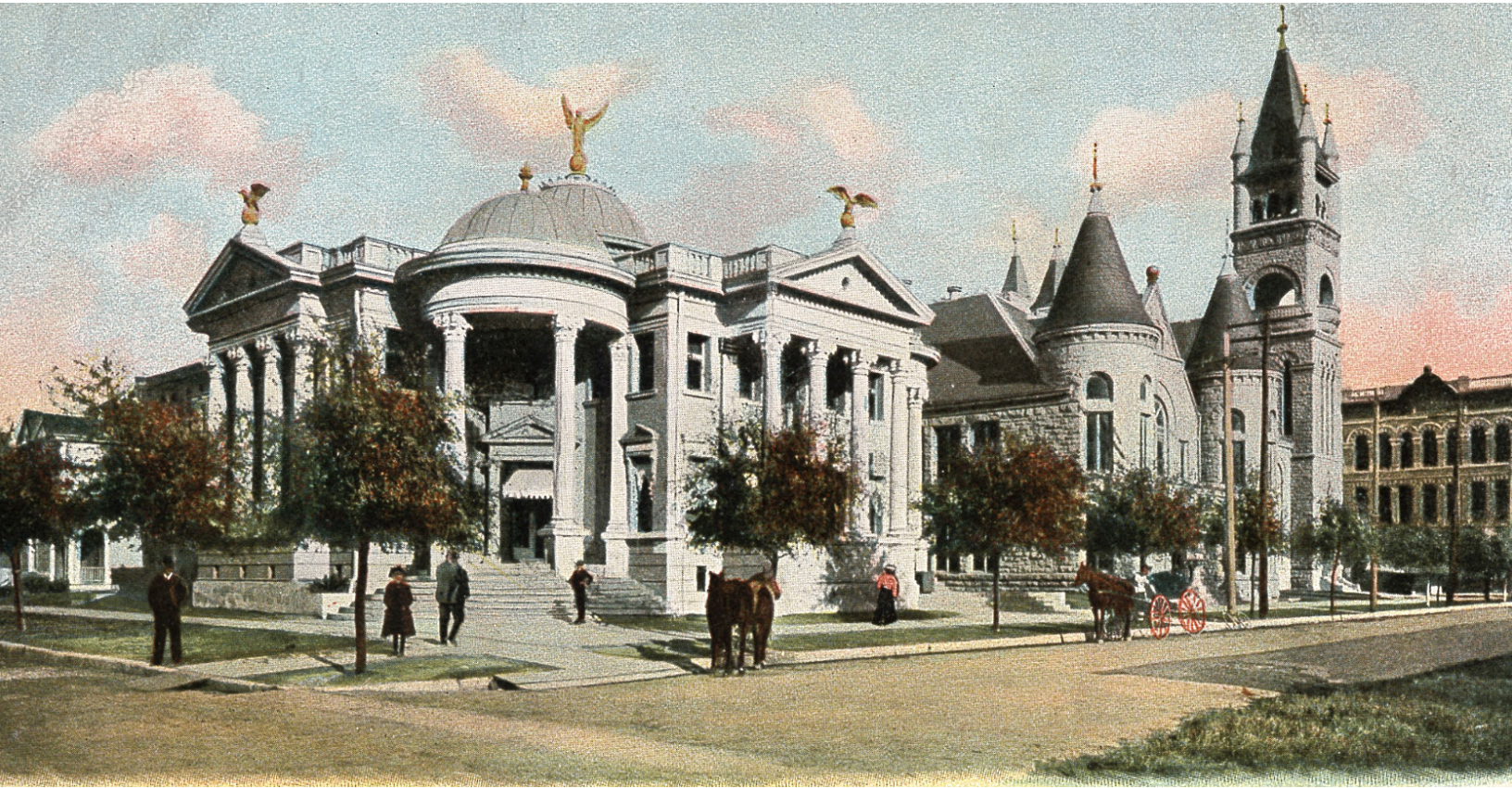
In calendar year of 2016, 11 volunteers received the Giving a Hundred Award. The Giving a Hundred Award is granted to volunteers who have given over 100 hours of service in a given year. **These 11 individuals gave over 1,875 hours of service combined.**

| | |
|---------------------|-----------|
| Elsa Anzalone | 223 hours |
| Ivonne Douma | 232 hours |
| Marion Friedman | 185 hours |
| Jaime Hinojosa | 189 hours |
| Rosemary Jackson | 200 hours |
| Ron Kleist | 121 hours |
| Amanda McGrath | 174 hours |
| Nely Resendiz | 184 hours |
| Catherine Robichaux | 144 hours |
| Nancy Shape | 103 hours |
| Stanley Zimmer | 120 hours |



Legacies of Literacy

Ladies' Reading Club and the Woman's Club of Houston



In 1904, several insightful women's groups came together, and through their tenacity, ingenuity, and unity, they helped create the free library system in Houston that we know and love today.

Two of these organizations are still serving the library and literacy community: The Ladies' Reading Club of Houston and The Woman's Club of Houston.

To this day, they are shining examples of continued commitment and advocacy of our cause. The accomplishments of these two organizations are vast, for over 130 years, these extraordinary generations of female leaders have made, and continue to make, donations of time, money, and advocacy supporting the Houston Public Library.

The Ladies' Reading Club continues to support a variety of library programming. The Woman's Club of Houston sponsors Houston Public Library's *Children's Celebration: Books Alive!* Every year, the library's programming team gathers authors, artists, performers and collaborators to celebrate children's literacy and the love of reading.

Fun Facts:

The Woman's Club of Houston member Eileen Rash was recognized as the founder of the Friends of the Houston Public Library in 1945.

Looscan Library, Kendall Library, and Ring Library were named after early library pioneers in these clubs:

Adele B. Looscan organized the Ladies' Reading Club of Houston in 1885, one of the first women's clubs in Texas.

Elizabeth L. Ring, president of the Ladies' Reading Club, was noted for leading a cooperative effort to lobby the city to take over funding of the Houston Lyceum in 1899. She was instrumental in creating the Houston Federation of Women's Clubs which, together, successfully campaigned for the Carnegie Library.

Belle Sherman Kendall, of the Woman's Club of Houston, alongside Miss Mamie Gearing, wrote the letter to Andrew Carnegie, which granted \$50,000 to build the first designated public library building, with the conditions that the city provide a proper site and maintenance.

Library Legacy Block in Downtown Houston



The Julia Ideson Building, the Jesse H. Jones Building, and the Barbara Bush Literacy Plaza are named for community leaders whose combined legacies span over a century and cross a multitude of industries.

Their thoughtful philanthropy continues to enrich the lives of families and children, and will for decades to come. These three downtown landmarks form one city block that we affectionately named the "Library Legacy Block." Serving the city and visitors alike with a wealth and array of resources, experiences, and programming live in the heart of Houston, right across the street from City Hall.

Julia Ideson, Jesse Jones, and Barbara Bush came to Houston and made an astounding impact on the city. They committed themselves to strengthening communities through their active support of Houston's infrastructure. Jones funded brick and mortar buildings to the benefit of the public. Ideson expanded access to books and educational materials, and Bush currently promotes literacy and education. Their service is interwoven into delivering the present-day mission of our Houston Public Library.

After graduating from college in 1903, **Julia Ideson** became the first librarian for the public library system in Houston, and she held this position for more than forty years. She positioned the library system for dramatic growth, and by the time of her death in 1945, she increased the library's collection from 13,000 to over 250,000 books. Miss Ideson also notably grew the public library system in Texas while serving on the Texas Library Association as secretary, and president and vice-president of the national American Library Association. Ideson

relentlessly believed in education and in expanding access to educational resources.

Jesse H. Jones pioneered new businesses and expanded Houston's industries, establishing Houston as a modern economic center. Jones helped fund universities, libraries, radio stations, and significant downtown buildings. In 1947, Mr. Jones shifted his focus to philanthropy, and along with his wife, Mary Gibbs Jones, they managed the Houston Endowment, a foundation that he and Mary established in 1937. Houston Endowment still operates today, granting about \$75 million annually to hundreds of organizations throughout the city, from scholarship initiatives to grants for arts and culture.

The First Lady of Literacy, **Barbara Bush**, is a modern example of the philanthropic spirit. Even before she became the first lady, Mrs. Bush volunteered for causes near and dear to her heart, including United Way and the Sloan-Kettering Memorial Hospital. In 1989, she established the national Barbara Bush Foundation for Family Literacy and subsequently the local Barbara Bush Houston Literacy Foundation. She advocates for universal literacy and continues to advance the cause of literacy through her support of schools, libraries, and other educational institutions.

Ideson, Jones, and Bush are each a servant of the people of Houston and the United States of America. This "Library Legacy Block" in downtown Houston serves as a lasting monument of their significance to the local community. Their legacy honors the past, present, and future of Houston and invites residents and visitors alike to the vast array of resources, experiences, and programs in the heart of Houston.

Caring for the Cause

The Houston Library Foundation connects local humanitarians, philanthropists, and caring organizations with the vital work of the Houston Public Library. Over 345 donors entrusted the Foundation to use their contributions wisely and advance the Library's mission of "Linking You to the World."

Due to your incredible generosity, the Library organized cultural events such as Books Alive!, expanded programs such as the John P. McGovern Summer Reading Program, and began new technology initiatives in the community. Each of the Library's programs reach diverse audiences, linking Houstonians to books, technology, workforce assistance, after-school support, and so much more. Thank you for joining us in 2017. Your continued support and partnership is essential to expanding the Library's programs.

Donors

\$500,000 +

President and Mrs. George H. W. Bush
Downtown Redevelopment Authority (*TIRZ #3*)
The Robert and Janice McNair Foundation
Phillips 66

\$100,000 - \$499,999

Anonymous

\$50,000 - \$99,999

Barbara Bush Houston Literacy Foundation
Capital One Services N.A.
Lurine Karon Greenberg Fine Arts
Collection Trust
John P. McGovern Foundation

\$10,000 - \$49,999

H.W. Wilson Foundation, Inc.
Memorial Hermann
Susan Vaughan Foundation, Inc.

\$5,000 - \$9,999

AECOM
Comp U Dopt, Inc. (*United Way of Greater Houston*)
Human Capital Management
Tina and Mitja Peterman
The Waterman Steele Group

\$1,000 - \$4,999

Dr. Sudha A. Bidani
Zarine M. and Meherwan P. Boyce
Cadence Bank
Patricia W. Davenport
Mr. and Mrs. Christopher David
ExxonMobil Foundation
FirstSouthwest,
A Division of Hilltop Securities, Inc.
The Hood Barrow Foundation
Houston Astros Foundation
Houston First
Dr. and Mrs. Richard Jackson
Ladies' Reading Club
Mr. and Mrs. Russell Lewis
The Honorable Sue E. Lovell
Sheila and Tad Mayfield
Amber Mostyn
The Nursing Book Club
Sally Swanson
Kris and Neil Thomas
Laurie Vignaud

** Donations made between July 1, 2016- June 30, 2017*

** If you would like to update your preferred listing, please contact us at hello@houstonlibraryfoundation.org*

Igniting Impact: Phillips 66



Exemplifying the spirit of commitment to the community, Phillips 66 received our first Igniting Impact Award in 2017.

In addition to signing on as the Presenting Sponsor of the 2017 Beyond the Page Luncheon, their transformational first time gift to the Foundation benefited the Barbara Bush Literacy Plaza. Their extraordinary generosity will have a lasting impact on the Houston Public Library and the Houston community.

Phillips 66 believes in investing in education because an educated workforce drives the world's economy. They support fundamental literacy education and skills critical to advancing energy solutions, such as improving competence in math, science, and engineering disciplines.

\$250 - \$999

AIDS Healthcare Foundation

Clay Albers

Albertsons Safeway

American Library Association

Anonymous

Kristin Blomquist

Minnette Boesel

BP America, Inc.

Janet Carter

Dr. Joye Carter

Betty T. Chapman

City of Houston Combined Municipal Campaign

Constellation Energy Group Foundation

Mr. and Mrs. Bruce Deskin

Ginger Driver

Nan Dubbelde

William Durham and Susan Gallagher

Commissioner and Mrs. Rodney Ellis

Dr. Kelli Cohen Fein

Jerry & Nanette Finger Foundation

Tina Fleck

LaTanya Flix

Shara Fryer

Samuel Gardner

Rose M. Hinojosa

Barbara Hurwitz

Dr. Nora J. Klein

James Koski

Kroger

Lauren Griffith Associates

Theresa Lee

Sharon Linbeck

Jane Marmion

Mr. and Mrs. Daniel Menendez

Patricia Mitchell

Mr. & Mrs. Richard Mithoff

O Live Fund

Dr. LeCresha Peters

Laura Ramos

Gay A. Roane

Diane Robinson

Shell Oil Co. Foundation (Hero Program)

Wendel Skolaski

Mrs. J. S. Stone

Drs. Gabriele and Heinrich Taegtmeier

Janet Tallerine

Mr. and Mrs. John M. Tauser

The Weingarten Schnitzer Foundation, Inc.

Urban Libraries Council

Yesenia Valdez

Alison Weaver

Mr. and Mrs. John Wildenthal

Carme Williams

Mr. and Mrs. Walt Zerkow

Monica Ziemba

Julia Ideson Legacy Society

Members of the Julia Ideson Legacy Society play a vital role in the sustainability of the Houston Public Library. By naming the Houston Public Library Foundation in wills, insurance policies, and retirement plans, **members have enabled our endowment to grow to \$16.9 million in fiscal year 2017**. These endowments fund programs and initiatives for the Library every year, supporting the community's need for a link to literacy, technology, and family and youth programming.

Named after Houston's first librarian, Julia Ideson, the Society aims to honor her visionary legacy by ensuring long-term financial stability for the library system. She was a driving force in the addition of five new libraries to the Houston area, the first library for African Americans in the area, Colored Carnegie Library, and the first municipal book mobile.

The Julia Ideson Legacy Society funds and their dates of inception are as follows:

| | | | |
|--|------|---|------|
| Andrews Fund | 1967 | E. Joseph Fund | 1968 |
| Business Science and Technology Collection | 1982 | Ladies Reading Club Continuing Education Fund | 1985 |
| Children's Room Book Fund | 1959 | Meldrum Fund | 1901 |
| Clayton/Martin Fund | 2001 | Oppenheimer Fund | 1985 |
| Cullinan Fund | 1983 | Reynolds Fund | 1977 |
| Director's Fund | 1982 | Settlemyre Fund | 1905 |
| Finnigan Fund | 1940 | Schnitzer Fund | 1966 |
| Freed Fund | 1995 | Social Sciences Fund | 1985 |
| Geological Society Fund | 1931 | Symonds Fund | 1973 |
| Hill Fund | 1931 | Mary Fay Fund | 2000 |
| Humanities Fund | 1978 | Two Endowments: Program & Beautification | |
| Julia Ideson Memorial Fund | 1945 | Williamson Fund | 1997 |

Leave Your Legacy

If you want to leave a lasting legacy by joining the Julia Ideson Legacy Society, please contact Sally Swanson, Executive Director at 832-393-1524.



Julia Bedford Ideson

Houston Library Foundation's Financials



The Houston Public Library (HPL) is a dynamic library system serving the fourth largest and most diverse metropolitan area in the country. The Library's mission is to "link people to the world," and this is accomplished through a broadly defined platform of educational, recreational, cultural programs and services for persons of all ages, ethnicities and life stages throughout Houston and the surrounding region. HPL is guided by core service priorities which include student success, technology access and instruction, literacy advancement, civic engagement, cultural empowerment, and workforce development.

HPL aligns its system of support across the entire Houston area through a network of 31 Neighborhood Libraries, four Regional Libraries, three Special Collection Libraries, four Express Libraries, the HPL Mobile Express, and a satellite library located at the Children's Museum of Houston. The flagship facility, Central Library, located in downtown Houston, anchors this constellation of service points.

The City of Houston's budget provides for those facilities, 468 full-time equivalent HPL employees, and \$4,705,059 for books/materials for the Houston Public Library system. In Fiscal Year 2017, the city budget for the Houston Public Library as a city department was \$40,867,443. Even with this large of an investment, "Private Fund" contributions are critical for programs.

The first Houston Public Library Endowment originated in 1901, and over 100 years later, the Library Foundation manages 25 library endowments. Each endowment provides compounded earnings to help fund specific programs or interests identified in the original donors' bequests. The HPLF Board of Directors uses a formula to determine the annual endowment allocation. **In 2017, they awarded \$930,000 to support HPL's programs.**

Charitable contributions are also essential, and the Library Foundation **received \$2,094,273 in donations and an additional \$550,000 of in-kind contributions from community partners.** HPLF serves as a community connector and engages individuals, corporations, foundations, and organizations to HPL's programs and initiatives, including the Barbara Bush Literacy Plaza and the inaugural HPLF Beyond the Page luncheon.

Fiscal year 2017 was a year of growth and learning, led by the culture of philanthropy that extends throughout the community.

Summary of Statement Activities

The Statement of Activities presents the operating results of the Foundation. The following table reflects condensed information of the Foundation's operations:

| Expense | FY 2017 | FY 2016 | Difference | % Change |
|---------------------------------|----------------|----------------|-------------------|-----------------|
| Programmatic | \$ 2,339,740 | \$1,888,696 | \$451,044 | 24% |
| Other | \$ 403,550 | \$271,506 | \$132,044 | 49% |
| Total Expenses | \$ 2,743,290 | \$2,160,202 | \$583,088 | 27% |
| Revenue | | | | |
| Investment Income | \$ 2,274,184 | \$ 238,398 | \$2,035,786 | 854% |
| Contributions and Other Income | \$ 2,338,957 | \$ 595,360 | \$1,743,597 | 293% |
| Total Revenue | \$ 4,613,141 | \$ 833,758 | \$3,779,383 | 453% |
| Changes in Net Position | \$1,869,851 | - \$1,326,444 | \$3,196,295 | 241% |
| Net Position, Beginning of Year | \$19,868,049 | \$21,194,493 | -\$1,326,444 | -6% |
| Net Position, End of Year | \$21,737,900 | \$19,868,049 | \$1,869,851 | 9% |

Summary of Net Position

The Statement of Net Position includes all assets and liabilities using the accrual basis of accounting. The following table reflects condensed information on the Foundation's net position:

| Assets | FY 2017 | FY 2016 | Change | % Difference |
|----------------------|----------------|----------------|---------------|---------------------|
| Cash and Investments | \$21,057,619 | \$20,321,185 | \$736,434 | 4% |
| Other Assets | \$1,058,340 | \$40,119 | \$1,018,221 | 2538% |
| Total Assets | \$22,115,959 | \$20,361,304 | \$1,754,655 | 9% |
| Liabilities | | | | |
| Total liabilities | \$378,059 | \$493,255 | -\$115,196 | -23% |
| Net Position | | | | |
| Restricted | \$17,838,835 | \$15,707,444 | \$2,131,391 | 14% |
| Unrestricted | \$3,899,065 | \$4,160,605 | -\$261,540 | -6% |
| Total Net Position | \$21,737,900 | \$19,868,049 | \$1,869,851 | 9% |

Leadership

July 1, 2016 - June 30, 2017

Board of Directors

Licia A. Green-Ellis
Chairperson

Zarine M. Boyce
Vice Chairperson

Tina Arias Peterman
Treasurer

Neil Thomas
Acting Secretary

Ryan Leach

Christopher Lloyd

The Honorable Sue Lovell

Sheila Mayfield

Carme Williams, CFRE

Ex-Officio

The Honorable Sylvester Turner
Mayor of Houston

Richard Carranza
HISD Superintendent

Lauren Guillerman
Friends of HPL

Rhea Brown Lawson, Ph.D.
HPL Director

Sally Swanson, CFRE
HPL Foundation Director

Mission

Through advocacy and fundraising, the Houston Public Library Foundation supports the Houston Public Library's wide range of initiatives with particular emphasis on its neighborhood libraries and their community programs.

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