

T H E



W E S T F I E L D  
A T H E N A E U M

**FY 2022**

## **Annual Report**

**Susan Drummey, President**

**Tracie Kester, Vice President**

**Mark Morin, Treasurer**

**Deborah Styrcharz, Assistant Treasurer**

**Candy Pennington, Secretary**

**Guy McLain, Director**



ANNUAL CORPORATORS MEETING  
MONDAY, OCTOBER 24, 2022  
7:00 P.M.

**AGENDA**

1. CALL TO ORDER – Ms. Sue Drummey
2. NOMINATING COMMITTEE REPORT –
3. OATH OF OFFICE – Ms. Sue Drummey
4. AUDITOR'S REPORT – Mr. Larry Zabielski
5. FINANCIAL REPORT – Mr. Mark Morin
6. DIRECTOR'S REPORT – Mr. Guy McLain
7. ANY OLD BUSINESS
8. ANY NEW BUSINESS
9. ADJOURN



Milton Burrell Whitney Library  
Jasper Rand Art Museum  
Edwin Smith Historical Museum

October 1, 2022

NOTICE OF ANNUAL MEETING OF CORPORATORS

Notice is hereby given that the Annual Meeting of the Corporators of the Westfield Athenaeum will be held on Monday, October 24, 2022 at 7:00 P.M. for the following purposes:

1. To hear and act upon the reports of officers and committees for the Fiscal Year, July 1, 2021 to June 30, 2022
2. To transact such other business as may properly come before the meeting, including the election of Officers, Directors, and additional members of the Corporation.

Sincerely,

Susan Drummey  
President



October 24, 2022

Milton Burrall Whitney Library  
Jasper Rand Art Museum  
Edwin Smith Historical Museum

REPORT OF THE NOMINATING COMMITTEE

The Nominating Committee is pleased to present the following nominations for Corporators, Directors and Officers:

CORPORATORS

Carly Bannish  
Andrea Bryla

72 Laro Road  
20 Broadway

DIRECTOR FOR THREE YEAR TERM (2025)

Philip Cameron  
Tracie Kester  
Susan Kingra

83 Loomis Ridge  
257 Shaker Road  
11 Oakcrest Drive

OFFICERS FOR ONE YEAR

President  
Vice President  
Treasurer  
Assistant Treasurer  
Secretary

Susan Drummey  
Tracie Kester  
Mark Morin  
Deborah Strycharz  
Candy Pennington

98 Christopher Drive  
257 Shaker Road  
P.O. Box 858  
155 Tannery Road  
460 Loomis Street

Respectfully submitted,  
Susan Drummey, Member  
Linda Saltus, Member

ANNUAL CORPORATORS MEETING  
MONDAY, OCTOBER 25, 2021  
WESTFIELD ATHENAEUM  
LANG AUDITORIUM

The 2021 Annual Meeting of the Corporators of the Westfield Athenaeum was held on Monday, October 25, 2019 in the Lang Auditorium of the Westfield Athenaeum. President Sue Drummey presided. Approximately 31 Corporators were in attendance.

**CALL TO ORDER:** President of the Board of Trustees Sue Drummey called the meeting to order at 7:02 p.m.

President of the Board of Trustees Sue Drummey moved to have the minutes from the 2020 Annual Meeting accepted pending any additions or corrections. The minutes for the 2020 Annual Meeting were approved and accepted.

Chair of the Nominating Committee Chair Patricia Steele-Perkins presented the following Corporators, Directors, and slate of officers:

**CORPORATORS:**

Andrea Bryla  
Joan Corell  
Cynthia and Richard Gaylord  
Bridget Matthews-Kane and Timothy Matthews  
Dorothy O'Neil

**DIRECTOR FOR 3 YEARS (2024):**

Donna Burkott  
Harry Rock  
Deborah Strycharz

**OFFICERS FOR 1 YEAR:**

President:	Susan Drummey
Vice President:	Tracie Kester
Treasurer:	Mark Morin
Asst. Treasurer:	Deborah Strycharz
Secretary:	Jayne Mulligan

President Susan Drummey asked if there were any nominations from the floor. Hearing none, she declared the nominations closed. It was moved and seconded that the Secretary cast one ballot for the Corporators, Directors, and slate of Officers as presented by the Nominating Committee. Motion accepted.

The new Corporators were introduced and Ms. Drummey administered the Oath of Office. Officer transition was fully satisfied.

Mr. Zabielski read the summary auditor's report letter to the Corporators, explaining the status of the Library's funds and expenses. Mr. Zabielski prepared an opinion relative to the Athenaeum's financial statements, so written on June 30, 2021. Management is responsible for the maintenance and preparation of such documentations and such fair presentations that are free from material misstatement due to fraud or error. The audit includes an opinion developed as to the appropriateness of the accounting practices and presentation of such accounts within accounting principles generally accepted within the United States of America. Mr. Zabielski indicated that as a part of this role, the auditor considers internal control relative to the fair presentation of the documents audited. The audit also includes the appropriateness of accounting measures used. Mr. Zabielski that the financial statements referred to throughout his audit are appropriate such documents as to appropriate accounting principles. Mr. Zabielski reported the importance of having a clean opinion, as the third-party accountant reporting on the financial status of the organization. Mr. Zabielski reported that with the large amount of spending over the last several years to improvements to the building and that the Board has used the money appropriately and well. Mr. Zabielski thanked the Board of Trustees for their work over the past year and their trust in his work.

Ms. Drummey thanked Mr. Zabielski for his work and for his support.

President of the Board Susan Drummey asked for a motion to fully ratify all actions taken by the Officers of the corporation of the Board of Directors since the last Annual Meeting of the Corporators as set forth in the records of the Corporation. A motion was made and was passed.

Mark Morin talked about the current financial position for the Westfield Athenaeum. Due to COVID-19 we have been fortunate to actually have a million dollars profit compared to past years when we have scrambled to figure out how to fund the Athenaeum expenses. The surplus was due to an increase in funding from the State and the City of Westfield, investments did much better than expected and expenses were down because the building was closed for the better part of a year and fewer employees that were not replaced due to COVID. The surplus will help with much needed repairs of the building.

Ms. Drummey introduced the new Executive Director, Guy McLain, who started in February, 2021.

Mr. McLain thanked everyone for welcoming him to Westfield and to the Athenaeum. He talked about the unprecedented events of the previous year due to COVID-19. Mr. McLain explained that, although our building was closed, our services continued. In fact, our staff showed amazing creativity to provide services to our community. Library-to-Go was created and an average of 800 patrons were able to check out approximately 60,000 books, audio/visual materials, and other items every month. Our Outreach Librarian, Becky Blackburn, continued to deliver books to approximately 40 homebound

individuals. Staff quickly adapted to provide excellent programs in a variety of formats. Our Facebook videos have been viewed more than 60,000 times of more than 250 videos. Almost 18,200 people have viewed our live Facebook programs. Our pre-recorded programs have been viewed 42,000 times. Our Youth Services Department has provided 150 programs for children under 11. These programs were viewed 26,583 times. They also organized 94 programs for teens. Mary Regan recorded 60 Story Time programs that were watched 13,252 times. Our Summer Reading Program in 2020 attracted 125 children, 46 teens and 66 adults. In 2021 we had 176 children, 81 teens and 106 adults. Mr. McLain mentioned that on March 22 the Athenaeum was opened for appointments and on June 21<sup>st</sup> we opened with no restrictions. In September the Art Gallery was opened with an exhibit by Insun Russell. The History Museum is currently being moved to the Reed Room and is expected to open sometime in early 2022.

OLD BUSINESS:

No Old Business reported.

NEW BUSINESS:

No New Business was reported.

The meeting was adjourned at 7:42 p.m.

Respectfully Submitted,

Theresa Racine  
Administrative Assistant





WESTFIELD ATHENAEUM  
FINANCIAL STATEMENTS  
JUNE 30, 2022

LAWRENCE P. ZABIELSKI  
*Certified Public Accountant*  
65 Broad Street  
Westfield, Massachusetts 01085  
(413) 562-0000

To The Board of Directors  
Westfield Athenaeum  
Westfield, Massachusetts

#### INDEPENDENT AUDITOR'S REPORT

I have audited the accompanying financial statements of the Westfield Athenaeum, which comprise the statement of financial position as of June 30, 2022, and the related statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America, this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

My responsibility is to express an opinion on these financial statements based on my audit. I conducted my audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that I plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, I express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

I believe that the audit evidence I have obtained is sufficient and appropriate to provide a basis for my opinion.

In my opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Westfield Athenaeum, as of June 30, 2022, and the

results of its operations and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

*Lawrence S. Zelnick*

September 30, 2022

WESTFIELD ATHENAEUM  
STATEMENT OF FINANCIAL POSITION  
06/30/2022

ASSETS	Without Donor Restrictions	With Donor Restrictions	Total
<u>ASSETS</u>			
Cash Without Donor Restrictions	\$ 158,300	1,086,314	1,244,614
Accounts Receivable	802		802
Land, Buildings and Equipment - Net	3,021,783		3,021,783
Investments		3,608,541	3,608,541
 Total Assets	 \$ 3,180,885	 4,694,855	 7,875,740
 <u>LIABILITIES AND NET ASSETS</u>			
<u>LIABILITIES</u>			
Accounts Payable	\$ 12,173	555	12,728
Accrued Payroll	8,669		8,669
			0
 Total Liabilities	 20,842	 555	 21,397
 <u>NET ASSETS</u>			
Without Donor Restrictions	3,160,043		3,160,043
With Donor Restrictions		4,694,300	4,694,300
 Total Net Assets	 3,160,043	 4,694,300	 7,854,343
 Total Liabilities and Net Assets	 \$ 3,180,885	 4,694,855	 7,875,740

The accompanying notes are an integral part of these financial statements.

WESTFIELD ATHENAEUM  
STATEMENT OF ACTIVITIES  
YEAR ENDED JUNE 30, 2022

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
<u>Revenues, Gains and Other Support</u>			
City of Westfield Appropriation	\$ 1,053,895		\$ 1,053,895
State Aid and Grants	90,409	\$ 67,124	157,533
Revenues and Fines	23,136		23,136
Income from Investments	15,918	67,044	82,962
Gifts and Capital Grants	88,548	80,975	169,523
Net Assets Released from Restrictions	65,498	(65,498)	0
Decrease in Value of Beneficial Interest in Perpetual Trust		(682,041)	(682,041)
<u>Total Revenues, Gains (Losses) and Other Support</u>	<u>1,337,404</u>	<u>(532,396)</u>	<u>805,008</u>
<u>Expenses (See Schedule 1)</u>	<u>1,302,556</u>	<u>97,398</u>	<u>1,399,954</u>
<u>Change in Net Assets</u>	<u>34,848</u>	<u>(629,794)</u>	<u>(594,946)</u>
<u>Net Assets, Beginning of Year</u>	<u>3,125,195</u>	<u>5,324,094</u>	<u>8,449,289</u>
<u>Net Assets, End of Year</u>	<u>\$ 3,160,043</u>	<u>\$ 4,694,300</u>	<u>\$ 7,854,343</u>

The accompanying notes are an integral part of these financial statements.

WESTFIELD ATHENAEUM  
STATEMENT OF EXPENSES  
YEAR ENDED JUNE 30, 2022

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Bank Charges	\$ 72	\$ 34,688	\$ 34,760
Bookmobile	1,519		1,519
Books Purchased	116,558	2,361	118,919
Computer Expense	35,592		35,592
Conference Expense	828		828
Rents and Leases	4,864		4,864
Dues and Subscriptions	750		750
Fuel	18,244		18,244
Grounds Care	1,794		1,794
Insurance	33,755		33,755
Lighting	23,404		23,404
Repairs and Maintenance - Buildings and Equipment	9,514	19,441	28,955
Postage	1,720		1,720
Salaries and Payroll Taxes	931,772		931,772
Office Supplies	13,351		13,351
Telephone	4,570		4,570
Water	946		946
Professional Fees	2,276	2,250	4,526
Legal and Accounting	6,802		6,802
Various Grants and Program Expenses	7,747	38,658	46,405
Depreciation	86,478		86,478
 Total Expenses	 <u>\$ 1,302,556</u>	 <u>\$ 97,398</u>	 <u>\$ 1,399,954</u>

The accompanying notes are an integral part of the financial statements.

WESTFIELD ATHENENAEM  
STATEMENT OF CASH FLOWS  
YEAR ENDED JUNE 30, 2022

Cash Flows from Operating Activities	
Change in Net Assets	\$ (594,946)
Adjustments to Reconcile Change in Net Assets to Net Cash Provided by Operating Activities	
Depreciation	86,478
Realized and Unrealized Loss on Investments	682,041
Decrease in Accounts Receivable	68,901
Increase in Accounts Payable	1,693
Decrease in Accrued Expense	(1,759)
	<hr/>
Net Cash Provided by Operating Activities	242,408
Cash Flows from Investing Activities	
Acquisition of Land, Buildings and Equipment	(214,827)
Investment Sales and (Purchases) - Net	136,599
	<hr/>
Net Cash Used by Investing Activities	(78,228)
Net Increase in Cash	164,180
Cash - Beginning of Year	<u>1,080,434</u>
Cash - End of Year	<u>\$ 1,244,614</u>

The accompanying notes are an integral part of these financial statements.



WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**1. Nature of the Organization**

The Westfield Athenaeum (the Athenaeum) is a free public library located in Westfield, Massachusetts. The Athenaeum was incorporated in 1864 under the Laws of the Commonwealth of Massachusetts for the purpose of enriching the diverse community of Westfield by providing open access to educational, cultural, recreational informational resources and programs. The principal source of the Athenaeum's revenue is funding received from the City of Westfield and various state and private grants.

**2. Summary of Significant Accounting Policies**

*Financial Statement Presentation*

The financial statements of the Organization have been prepared on the accrual basis in accordance with accounting principles generally accepted in the United States of America. The financial statements are presented in accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 958 dated August 2016, and the provisions of the American Institute of Certified Public Accountants (AICPA) "Audit and Accounting Guide for Not-for-Profit Organizations" (the "Guide"). (SCS) 958-205 was effective January 1, 2018.

Under the provisions of the Guide, net assets and revenues, and gains and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, the net assets of the Organization and changes therein are classified as follows:

Net assets without donor restrictions: Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Organization. The Organization's board may designate assets without restrictions for specific operational purposes from time to time.

Net assets with donor restrictions: Net assets subject to stipulations imposed by donors, and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Non-Profit Organization or by the passage of time. Other donor restrictions are perpetual in nature, where by the donor has stipulated the funds be maintained in perpetuity.

*Use of Estimates*

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reporting amounts and disclosures. The Athenaeum's significant estimates include the valuation of investments. Accordingly, actual results could differ from those estimates.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

2. **Summary of Significant Accounting Policies** (continued)

***Cash and Cash Equivalents***

Temporary cash investments are carried at cost which approximates market. The Athenaeum considers its investments with an original maturity of three months or less to be cash equivalents.

***Concentration of Risk***

The Athenaeum maintains cash balances at a financial institution located in Western Massachusetts. Accounts are insured by the Federal Deposit Insurance Corporation up to \$250,000. At certain times during the year, the cash balances may exceed federally insured limits. The Athenaeum has not experienced any losses associated with these excess amounts.

***Investments***

Investments in marketable securities with readily determinable fair values and all investments in debt securities are reported at their fair values in the statement of financial position. Publicly traded securities are valued based upon quoted market prices at the close of business on the last day of the fiscal year. Unrealized gains and losses are included in the change in net assets. Realized investment gains and losses are determined by the specific identification of each investment's cost.

Securities contributed to the Athenaeum are recorded at fair market value on the date of the gift. Purchases and sales of investments are recorded as of the trade date. Dividends are recorded when received.

The Athenaeum adopted the requirements under the *Net Asset Classification of Funds Subject to an Enacted Version of the Uniform Prudent Management of Institutional Funds Act, and Enhanced Disclosures for All Endowment Funds* topic of the FASB Accounting Standards Codification (FASB ASC). This topic provides guidance on the net asset classification of donor restricted endowment funds for a not-for-profit organization that is subject to an enacted version of the Uniform Prudent Management Institutional Funds Act of 2006 ("UPMIFA") which serves as a model act for states to modernize their laws governing donor restricted endowment funds. This topic also requires additional disclosures about endowments (both donor restricted funds and quasi-endowment funds) for all organizations, including those that are not yet subject to an enacted version of UPMIFA. The provisions of the FASB ASC are effective for fiscal years ending after December 15, 2008 and the UPMIFA legislation was enacted in the Commonwealth of Massachusetts in July 2009.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**2. Summary of Significant Accounting Policies** (continued)

The Board of Directors of the Athenaeum, as the governing Board, is responsible for oversight of the Athenaeum's investments. Establishment and implementation of investment policy, including the establishment of investment guidelines and the selection of investment managers, has been delegated by the Board of Directors of the Athenaeum to its Finance Committee. Investments authorized by the Finance Committee include high quality, readily marketable equity and fixed income securities; other types of investments may be made with the prior approval of the Finance Committee.

The Athenaeum investment portfolio consists of an investment pool in which a large number of individual funds participate in order to benefit from the diversification and economies of scale. The primary investment objective of the investment portfolio is growth of principal sufficient to preserve purchasing power and to provide income to support current and future activities of the Athenaeum. Long-term the total return on the portfolio should equal the rate of inflation, plus the payout rate which is used to support current activities, plus an amount reinvested to support future activities. The Athenaeum expects its investment portfolio, over time, to provide an average rate of return of approximately 7% annually. Actual returns in any given year may vary from this amount.

Investments at June 30, 2022 are comprised of the following:

	Cost	Unrealized Gain	Fair Value
Mutual Funds Totals	\$ 2,625,027	\$ 983,514	\$ 3,608,541

***Property and Equipment***

Expenditures for physical properties are recorded at cost less accumulated depreciation. Additions, renewals and replacements are capitalized. Donated assets are recorded at their estimated fair market values at date of donation. Expenditures for repairs and maintenance are charged to expense as incurred. Depreciation of buildings and equipment is calculated over the estimated useful lives of the respective assets on the straight-line and accelerated methods, based on useful lives of 5 to 39 years. The Athenaeum evaluated the fair market value of its assets. No impairment was recorded.

***Fair Value of Financial Instruments***

As of January 1, 2009, the Athenaeum adopted the requirements under the *Fair Value Measurements and Disclosures Topic* of the FASB ASC. This topic defines fair value, requires expanded disclosures about fair value measurements, and establishes a three-level hierarchy for fair value measurements based on the observable inputs to the valuation of an asset or liability at the measurement date. Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**2. Summary of Significant Accounting Policies** (continued)

measurement date. An asset or liability classification within the hierarchy is determined based on the lowest level that is significant to the fair value measurement. This hierarchy prioritizes the inputs into three broad levels as follows:

*Level 1* – Quoted prices (unadjusted) in active markets for identical assets or liabilities.

*Level 2* – Inputs other than Level 1 that are observable, either directly or indirectly, such as quoted prices for similar assets or liabilities; quoted prices in markets that are not active; or substantially the full term of the assets or liabilities.

*Level 3* – Unobservable inputs that are supported by little or no market activity and that are significant to the fair value of the assets or liabilities.

Investments measured at fair value on a recurring basis at June 30, 2022 included funds held by the Athenaeum in mutual funds, common stock and government and agency bonds. The market value is determined using input at Level 1, as described above.

**Revenue Recognition**

The Athenaeum utilizes the accrued method of accounting whereby revenue is recorded when earned and expenses are recorded when incurred.

***Contributions***

Unconditional contributions are recognized when pledged and recorded as net assets without donor restrictions, or net assets with donor restrictions depending on the existence and/or nature of any donor-imposed restrictions. Conditional promises to give are recognized when the conditions on which they depend are substantially met. Gifts of cash and other assets are reported with donor restricted support if they are received with donor stipulations that limit the use of the donated assets.

When a restriction expires, that is, when a stipulated time restriction ends or a purpose restriction is accomplished, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statement of activities as net assets released from restrictions. Donor-restricted contributions whose restrictions are met in the same reporting period are reported as net assets without donor restriction support. Donations of property and equipment are recorded as support at their estimated fair value at the date of donation. Contributions restricted for the acquisition of land, buildings, and equipment are reported as net assets without donor restriction upon acquisition of the assets and the assets are placed in service.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**2. Summary of Significant Accounting Policies** (continued)

***Donated Property and Services***

Donations of property and equipment are recorded as support at their estimated fair value at the date of donation. Such donations are reported as unrestricted support unless the donor has restricted the donated asset to a specific purpose. Absent donor stipulations, the Athenaeum reports expirations of donor restrictions when the donated or acquired assets are placed in service as instructed by the donor.

No amounts have been reflected in the accompanying financial statements for donated services as no objective basis is available to measure the value of such services; however, a substantial number of volunteers have donated significant amounts of their time to the Athenaeum's programs and fund-raising efforts.

***Income Taxes***

The Athenaeum is exempt from federal and state taxes under Section 501(c)(3) of the Internal Revenue Code. In addition, the Athenaeum qualifies for the charitable deduction under Section 170(b)(1)(A) and has been classified as an organization that is not a private foundation under Section 509(a)(2).

Effective for the year ended June 30, 2010, the Athenaeum has adopted FASB ASC 740-10-25, "Accounting for Uncertainty in Income Taxes." FASB ASC 740-10-25 prescribes a comprehensive model for the financial statement recognition, measurement, classification and disclosure of uncertain tax positions. Management has not identified any uncertain tax positions and, therefore, no liability has been recorded in the financial statements.

The Athenaeum's information filings are subject to audit by the Internal Revenue Service. The Athenaeum's open audit periods are 2019 – 2021.

***Endowment***

***Interpretation of Relevant Law***

The Board of Directors (the "Board") of the Athenaeum have interpreted UPMIFA as requiring unrealized and realized gains and losses ("total return") of donor restricted endowment funds to be classified as temporarily restricted, absent explicit donor stipulations to the contrary, until appropriated by the Board and expended. Under this interpretation, the historic dollar value of the original gift that establishes a donor restricted endowment fund (and any subsequent gifts) is classified as permanently restricted.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**2. Summary of Significant Accounting Policies** (continued)

*New Accounting Pronouncement*

On August 18, 2016, FASB issued ASU 2016-14, Not-for-Profit Entities (Topic 958) – Presentation of Financial Statements of Not-for-Profit Entities. The update addresses the complexity and understandability of net asset classification, deficiencies in information about liquidity and availability of resources, and the lack of consistency in the type of information provided about expenses and investment return. Non-Profit Organization, Inc. has adjusted the presentation of these statements accordingly. The ASU has been applied retrospectively to all periods presented.

*Return Objectives and Risk Parameters*

The Athenaeum's investment portfolio consists of an investment pool in which a large number of individual funds participate in order to benefit from the diversification and economies of scale. The primary investment objective of the investment portfolio is growth of principal sufficient to preserve purchasing power and to provide income to support current and future activities of the Athenaeum. Investment securities are exposed to various risks such as interest rate, market and credit risk. Due to the level of risk associated with certain investment securities and the level of uncertainty related to changes in the value of the investment securities, it is at least reasonably possible that changes in risks in the near term would materially affect the amounts reported in the financial statements.

*Spending Policies*

Long-term the total return on the portfolio should equal the rate of inflation, plus the payout rate which is used to support current activities, plus an amount reinvested to support future activities. The Athenaeum expects its investments portfolio, over time, to provide an average rate of return of approximately 7% annually. Actual returns in any given year may vary from this amount.

*Strategies Employed for Achieving Objectives*

UPMIFA allows prudent appropriation of the total return on donor restricted endowment funds taking into consideration the Athenaeum's long and short-term needs, present and anticipated financial requirements, expected future total return on its investments, price level trends and general economic conditions. This policy is designed to preserve the value of donor restricted endowment funds in real terms (after inflation) and provide a predictable flow of funds to support operations.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

**2. Summary of Significant Accounting Policies** (continued)

Endowments at June 30, 2022 are comprised of the following:

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Donor restricted endowment funds	\$ -	\$ 3,608,541	\$ 3,608,541
Total Funds	<u>\$ -</u>	<u>\$ 3,608,541</u>	<u>\$ 3,608,541</u>

**3. Property and Equipment**

A summary of property and equipment at June 30, 2022 is as follows:

	<u>2022</u>
Building and Land	\$ 3,964,506
Equipment and Furnishings	891,313
Vehicles	20,149
Museum Collections, Valuable Papers, etc.	<u>52,585</u>
Total Property and Equipment	4,928,553
Less: Accumulated Depreciation	<u>(1,906,770)</u>
Property and Equipment, Net	\$ <u>3,021,783</u>

Depreciation expense for the year ended June 30, 2022 was \$ 86,478.

**4. Endowment Income**

The Athenaeum has adopted the total return policy for its endowment funds to determine the amount available for general and specific purposes. The Athenaeum may avail up to 5% of the endowment fund's average market value for the three preceding years.

To the extent total return for the current year is not met by investment yield (interest and dividends), the Athenaeum may transfer realized and unrealized appreciation from its endowment funds. To the extent investment yield exceeds availability for the current year, the excess remains invested.

Allowable spending for 2022 was \$ 164,510.

WESTFIELD ATHENAEUM  
Notes to Financial Statements  
June 30, 2022

5. Subsequent Events

Management has evaluated subsequent events through September 30, 2022, the date on which the financial statements were available to be issued.



## **Annual Meeting Director's Presentation**

### **Athenaeum**

I think I can start by saying, without exaggeration, that it's been an incredible year, with an amazing amount of activity on a variety of fronts. Library activity, programming, new exhibits, and building repairs, have all been extremely active this year. And what makes this level of activity so impressive is that this is the first year that we have been back to a normal schedule and been totally open since the pandemic hit us in March of 2020.

In fact, it seems amazing to me that it was just a little over a year ago, June of 2021, that we returned to normal operations, fully open six days a week, and with no restrictions on the public entering the building. It seems like everyone, our Board, our staff, and our users, were all so eager to return to the good old days of library activity that we actually went above and beyond our previous levels prior to the Covid outbreak.

Let's start with some numbers because the numbers are truly astounding when you really think about the hard work behind each of the statistics I'm about to show you.

### **Adult Services**

Let's start with Adult Services led by Kat Good-Schiff, Head of Adult Services, who by the way, just assumed this position in February of this year, and has already been instrumental in implementing a number of improvements in the services and procedures of the department.

As you can see from this slide, we now have almost 24,000 books available for check-out, more than 700 periodicals, more than 3,000 audio recordings of various kinds, and more than 4,300 videos.

But the last item on our list is truly astounding, and represents a whole new area of library services - namely the E-book. Because we are part of the CW/MARS systems, our patrons have access to more than 96,000 E-books, and more than 53,000 downloadable audio recordings and videos. And the good news is that

more and more of our patrons are using these new services and taking advantage of unprecedented levels of access to information.

As you can see – and this is just in the category of adult items - more than 54,000 books were checked out, more than 2,300 periodicals went out, almost 5,200 audio recordings were accessed, and more than 21,000 videos were loaned. And as I said before, more and more of our electronic sources are being utilized by our patrons and the numbers make that crystal clear. Almost 18,000 E-books were accessed and approximately 12,500 online audio items were checked out.

Our librarians also provided informational assistance to literally hundreds of our patrons. All in all our staff answered approximately 3,900 reference questions over this last year. That's an average of 75 a week. And keep in mind that these requests for information are often quite complicated and can take a librarian anywhere from 10 or 15 minutes to two or three hours on average to identify and deliver the information found to the patron.

### **American students in the classroom**

Of course, we must think about the future of our culture and society, and that's why our Youth Services Department, led by Olivia Eberli, is so important.

When we look at literacy skills of American students today the picture is grim. Approximately 34% of our 4<sup>th</sup> grade students are below the basic reading level, the lowest grade level. And 31% are below a proficient reading level, the next category above the basic level.

When we look at 8<sup>th</sup> graders the picture isn't any better. Some 27% of American Eight graders are below a basic reading level, and an astounding 39% (almost 4 in 10) are below a proficient reading level.

When we look at American high school seniors only 23% reach basic proficiency levels in all seven core subject areas tested.

Low levels of literacy and proficiency in math and science cost the U.S. an estimated \$225 billion in workforce productivity losses yearly. What makes matters worse is that we are falling behind other countries. Just a generation ago

American students were among the best in the world. The picture now is completely different.

American 15 year olds scored a lackluster 24<sup>th</sup> place compared to other countries in science, 39<sup>th</sup> place in math, and 24<sup>th</sup> place in reading ability. All totaled, 21 countries scored higher than the United States in all three categories of reading, math and science. Canada, just to our north, scored 7<sup>th</sup> place in science, 9<sup>th</sup> place in mathematics, and 3<sup>rd</sup> place in reading comprehension. You have to ask yourself why Canada is in the top 10 in all academic subjects when we here in the United States aren't in the top 20 in any category.

In a recent Atlantic Magazine article Nate Hilger, author of "The Parent Trap: How to Stop Overloading Parents and Fix Our Inequality Crisis," stated that "We need to make skill-development services – early education, after-school and summer programs, tutoring, counseling, college preparation, early career development – more available to families." That is what public libraries across the country, and on our own local level, the Westfield Athenaeum is committed to doing every single day. There isn't a day that goes by that we don't do something to help with early education, or offer some after-school program. Our summer reading programs are designed to help keep children reading during the months out of school so that their reading skills don't decline from the previous school year. And we also offer help with college preparation and career development.

Compiling this information reminded me of a quote by the novelist John Jakes. He made this statement. "Libraries are a pillar of society. I believe our lack of attention to funding and caring for them properly in the United States has a direct bearing on problems of literacy, productivity, and our ability to compete in today's world. Libraries are everyman's free university." I believe this quote pinpoints exactly why the work of the Athenaeum is so vital to our community.

Clearly, if we hope to improve our children's future opportunities, and keep America competitive on a global scale, we need to improve the educational outcomes of our youth, our future workers. We can help bring about better results in literacy and overall educational performance by utilizing the services

offered in our public libraries, and especially the work being done in our youth services departments.

### **Youth Services**

And as you can see from the numbers on this slide, we have a very active program of offerings for our children.

In our Young Adult section, geared toward teenagers, and ably led by our teen librarian, Tina Otero, we have available approximately 3,300 books, almost 600 videos, and 30 audio recordings. In addition, we are offering almost 100 electronic resources.

In our children's section we maintain more than 10,000 books, approximately 600 audio recordings, and almost 1,400 videos. We also offer almost 1,200 E-books, more than 900 electronic audio recordings, and almost 2,000 items in electronic format.

And the use of our Youth Services Department has been amazing. More than 41,000 books were checked out, 48 periodicals were accessed, more than 3,300 audio recordings were taken out, more than 5,100 DVDs were checked out, almost 2,200 e-books were accessed, and more than 1,800 downloadable audio recordings were used by our patrons.

I'm very proud to say that over the last year, all totaled, almost 50,000 items were checked out by our community's children.

### **Library of Things**

In addition to all the informational resources we also offer what we call a "Library of Things." In our Children's Library of Things we offer 144 games, 74 puzzles, 72 tablets, 39 toys, 37 puppets, and 29 educational kits. This year we added a microscope and night sky binoculars. We also revamped and updated our educational kits to include topics like discussing mental health with children and practicing mindfulness. The kits can help caregivers broach difficult topics with their children.

From our "At the Table, In the Garden" grant we are now loaning out a variety of kitchen items and have added some garden tools. Patrons can now check out a juicer, a bulb planter, a soil tester, and a set of hand tools. These are items that many families in our community don't have and can't afford to purchase. And clearly families in our community are taking advantage of their availability. All totaled, 321 of these items were checked out over this last year.

### **Total Circulation Activity**

All in all, almost 96,000 books and print resources, 26,000 videos, and 8,500 audio recordings, were checked out by our patrons over this last year.

Total E-books accessed were just under 20,000, and downloadable audio recordings checked out numbered a little more than 14,000.

If you add up every book, periodical, video, and audio recording we provided to the community over the last year, the number comes to more than 172,000 items.

Another astounding fact is that approximately 117,000 people walked through the doors of the Athenaeum over the past year. That means that, on average, almost 400 people entered this building every single day we were open.

### **Staff**

I just want to add that numbers like these don't happen by magic. These statistics reflect the hard work of all 26 of our dedicated staff members. Every book, video, or audio recording had to be evaluated, purchased, cataloged, and placed on a shelf in an appropriate location so that it could be found. And quite often a librarian had to assist a patron to find the item they wished to read.

Every librarian has heard someone say that it must be nice to work in a library so that you can read all day. Librarians always have a good laugh about that misguided perception. The reality is that librarians are so busy helping other people read that they don't have time to read themselves.

## **Programs**

But our staff activity goes well beyond providing items to check out. And this leads us to our programs. I'm especially proud of our staff in this area. Becky Blackburn is our Public Services Librarian, and she has done a great job bringing in a wide range of programming. Many others on our staff have also contributed to our programming. In fact, most of our staff members have at one time or another designed a program or somehow assisted in making a program a success. The Athenaeum has become known among librarians around the region as a library that does an especially large number of innovative and diverse programs. And again, the numbers bear this out.

## **Programming Statistics**

Let's look at the numbers for our programs. The total number of live programs for adults came to 63 this year, and we offered 21 programs for audiences of all ages.

We offered 57 programs for our teen patrons.

We offered 62 programs for children between the ages of 6 and 11.

And we offered 54 programs to children below the age of 6.

All in all we offered 257 live programs attended by more than 3,500 people.

We also offered 41 recorded programs. Of course, these programs can be viewed by going to our website at any time. A program we did – say - six months ago can be viewed today. But if we count just the number of views of our programs within 30 days of the original release date we had almost 12,500 viewings of our recorded programs.

When you consider that we are open about 300 days per year that means that we offered a program almost every day. And this figure doesn't include outside groups who used the Athenaeum for their programs or meetings. We coordinated and provided meeting space for 393 meetings held by outside groups.

## **Social Media**

This leads us to social media. I know I don't need to tell anyone here tonight that connecting to people through social media is an absolute must in this day and age. We have a constant presence on all the important social media outlets. This presence supports our daily activities, our programs, and all other activities in the library. We also create films that can be viewed on our website and on YouTube. This activity greatly increases our reach into the community.

That leads me to our website. Of course, every organization must have a good website. We have an excellent website operated and updated on an almost daily basis. If you don't check our website at least once a week there's a very good chance that you'll miss something you wish you had known about.

## **Insun Russell show**

Of course, as I'm sure all of you know, the Athenaeum is much more than just a library. We also have a wonderful art gallery and a history museum. Let's start by taking a look at the activities of the art gallery over the last year. We re-opened the art gallery with a wonderful exhibit by the artist Insun Russell in September last year.

## **Athenaeum exhibit**

Then we put together an exhibit of our own paintings. Many of you may not be aware that the Athenaeum owns a very nice collection of art. We have landscapes (many showing areas of Westfield), portraits, still life paintings, interior scenes, even abstract art. This exhibit, opened in November of last year and was up through March of this year, featured a selection of more than 30 of the Athenaeum's most interesting and representative paintings. This exhibit also gave us the opportunity to show some of the artists who have worked in Westfield over the last 150 years.

Such artists as Lucy Douglas Johnson, Bertha Bates, Muriel Richie, and Elizabeth Chadwick were featured.

### **Mary Ann Douglas Johnson's paintings**

This is a painting by the first professional artist to live in Westfield, Mary Ann Douglas Johnson. She was married to William Johnson, the man who founded an organ company making some of the finest church organs of the nineteenth century. Many of Mary Ann Douglas Johnson's landscape scenes were executed prior to the advent of photography and provide for us our only view of what Westfield looked like in the early nineteenth century. This painting shows us Court Street and the house that would later become the Westfield Athenaeum some 50 years after this painting was executed.

### **Muriel Richie's paintings and one of Elizabeth Chadwick's paintings**

Muriel Richie and Elizabeth Chadwick were active in Westfield in the first half of the twentieth century and they exhibited regularly in the Rand Gallery in the decade following the construction of the Great Hall in 1927.

And since this exhibit brought out paintings by past Westfield artists, and also presented portraits of some of the prominent residents of the city over the last 150 years, this exhibit also gave us the opportunity to explore the history of Westfield. Each painting in this show presented two stories at once, one about the art being created in this region at various stages of our history, and another story about the people in the paintings who were important personages in the city's development.

### **Student Art Show**

In April of this year we revived the annual student art show featuring creative students from all 14 of Westfield's schools. Hopefully, the revival of this show will inspire our students to take an interest in art and maybe try their hand at creating art. Who knows, we may just have the next Picasso taking an art class in one of Westfield's schools right now. We want to encourage that student.



### **Ruth Kjaer show**

In May we opened an exhibit of the art of Ruth Kjaer, one of the most important painters currently working in Western Massachusetts. Ruth is in museums and galleries all over the United States, and we were fortunate to be able to get her to exhibit here at the Athenaeum. This exhibit presented a series of paintings on women's issues. Ruth ingeniously took stories from the ancient Greek myths and reinterpreted them from a modern, feminist perspective in order to bring fresh light to the many issues women face today. Some of these paintings can still be seen in the Great Hall and reflect her creative use of Abstract Expressionism and Neo-expressionism. If you haven't taken a close look at those paintings I highly suggest that you do. There's a pamphlet on those paintings available at the Circulation desk.

### **Laura Radwell show**

In September we opened an exhibit of the art of Laura Radwell. In this show Radwell explores the possibilities of the Color Field School of art that was such an important artistic movement in the 1950s and 1960s. This exhibit also shows a number of her paintings using apps available on I-Pads to create the work of art. This is a totally new technology that artists are beginning to explore. This exhibit is still on exhibit upstairs until the end of the month.

### **Frank Cressotti**

Next month we open an exhibit of the art of Frank Cressotti, an artist who grew up in Westfield and who spent almost four decades teaching art to local students. In this show, which I'm really looking forward to seeing, Frank will explore the ramifications of Modernism and where that might lead art in our own times. Our opening for this exhibit is on November 3<sup>rd</sup>, from 6 to 8 pm, and I hope all of you can come and meet the artist.

### **New History Exhibit in the Reed Room**

We have also made major changes to our presentation of Westfield history. Let me begin by saying that Westfield history is fascinating, varied, and is a

microcosm of the history of New England and the United States. By looking closely at this community over the last 350 years one can come to a better understanding of the life of the Puritans in the 1600s. We can understand the currents that led the colonies to break away from England in the 1770s, and then come to a better understanding of the economic difficulties of forming a new nation when Shays Rebellion broke out in 1787.

And yet again, since Westfield is such a perfect example of what happened in numerous towns and cities across the country, Westfield history can help us understand the impact of the Industrial Revolution in the United States in the nineteenth century, and understand the decline of industrial production in this country in the early twentieth century. And finally, by studying Westfield's recent past we can develop a better understanding of the impact of suburbanization, the development of new modes of transportation, the impact of the computer and the cell phone, and other 20<sup>th</sup> century trends in American life in the last 50 years.

Certainly, we can read books about American history and obtain a partial grasp of the American story. But by looking at this community in each of these key periods we not only understand the broad outlines of our history, we can understand the story on a more personal level. We can feel the impact of new developments on the everyday life of people in each of these eras. And we can come to a greater understanding of how communities respond to economic developments, revolutions, civil wars, urbanization, and new technologies. These are the reasons that every Westfield resident should study the history of our dynamic community.

But that history has been largely hidden away and inaccessible to residents for some time now. Regrettably, the only space available for history exhibits was a small room up a narrow staircase with no handicap accessibility. And due to the problems of this space many of the exhibits in that room had not been updated in many years.

Both the Board and the Staff knew that something had to be done. So over a year ago we developed an ambitious plan to bring history exhibits down to the main floor of the building and to develop an entirely new display accessible to all and available for viewing whenever the library was open.

In order to accomplish this new vision we enlisted the help of local craftspeople to build new exhibit cases, renovate the Reed Room, and install new lighting. We drafted the assistance of people like Bob Brown and Cynthia Gaylord, who are experts on Westfield history, to advise us on what themes to cover and what artifacts to include.

And I'm pleased to report that we opened the new history exhibit with a well-attended grand opening on September 22<sup>nd</sup>, just a month ago. That event also featured a well-attended and extremely interesting talk by historian Bob Brown. Now we have an easily accessible exhibit giving an overview of Westfield history from the founding of the town in 1669 to the present day.

We also now have a large exhibit case that allows us to present rotating displays on specific themes. Our first temporary exhibit, now on display, is a show on fashions in the Roaring 20s. This exhibit, curated by our Local History Librarian Kim Pereira, features four beautiful dresses owned by Westfield women, along with a variety of purses, gloves, hats, and other accessories. The exhibit also displays school yearbooks, sheet music of the time, and a Westfield made set of golf clubs.

If you haven't had the opportunity to see these two displays, please set aside some time for this look into our history. And be sure to return next May when we change the temporary exhibit and replace it with a display on Westfield veterans. I'm really looking forward to putting that exhibit together, and I feel certain that our patrons will find this new exhibit interesting and informative.

### **Athenaeum**

Before I close I want to say just a few words about future plans. Libraries rely on a good infrastructure. Every library needs room for books, space for staff to work, areas for patrons to study, meeting rooms for classes and programs, and climate controlled archives for the preservation of fragile documents and artifacts. This grand building, in which sections date back to the 1830s, with new sections added in 1927, 1966, and 2018, still needs some important renovations. Right now we need to implement roof repairs, and we need to do work in the Great Hall, the

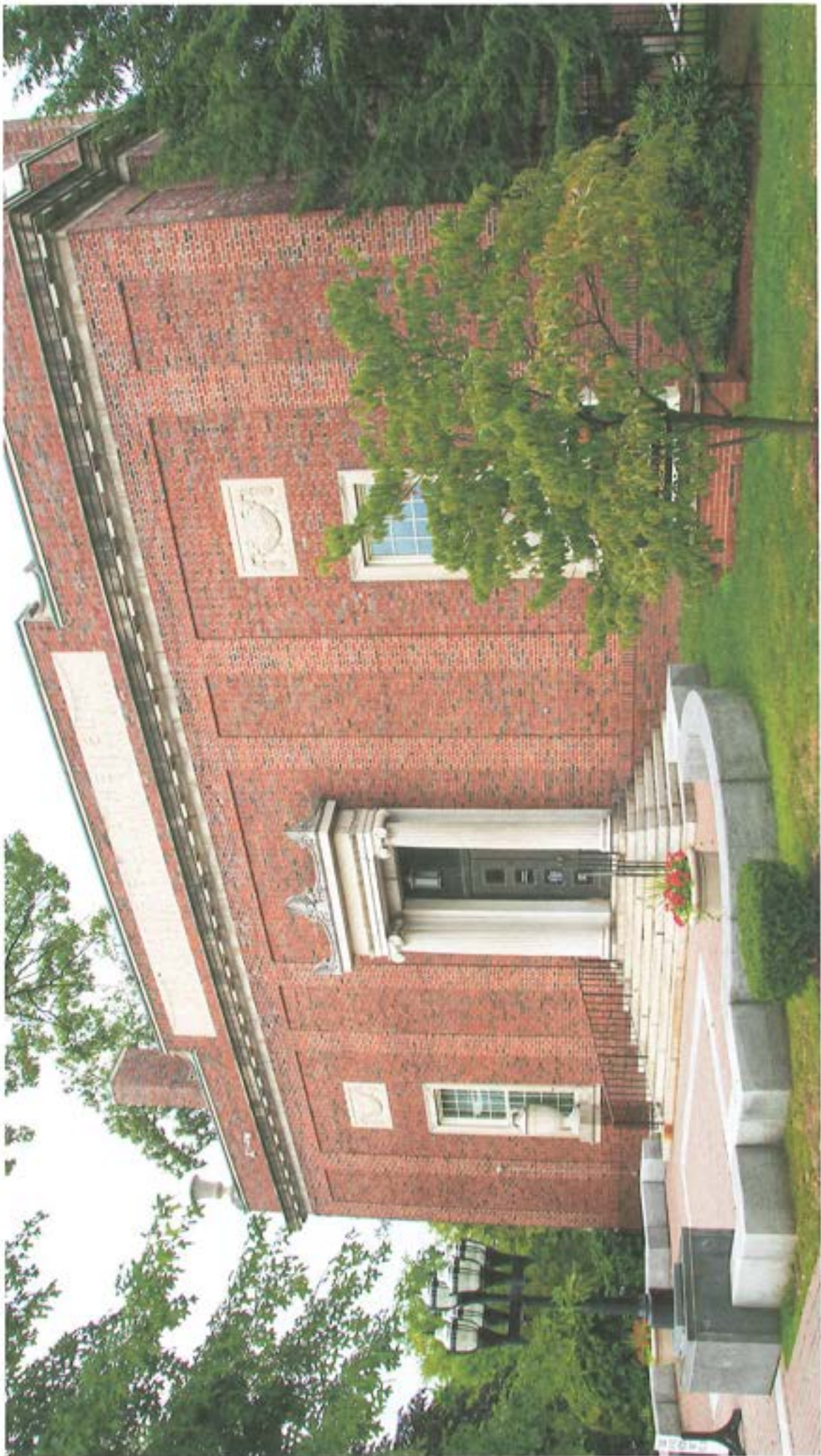
Rand Gallery, and other areas of the building. Those of you who own an old house know all too well that there is always something in need of renovation.

But in order to continue to offer the highest quality library services, to continue to mount thought-provoking art exhibits, and to continue to present history displays that show our artifacts - but at the same time protect them from harm - we must raise significant new funds and continue to work together to meet these demands. And when I say "we" I mean the entire community. This institution is for everyone in the community, but that means that everyone needs to step forward and work to help it thrive. I ask all of you to consider what you can do to support the Athenaeum in the coming months and years. We need everyone.

Thank you.

Guy McLain

Executive Director



## Holdings as of June 30, 2022

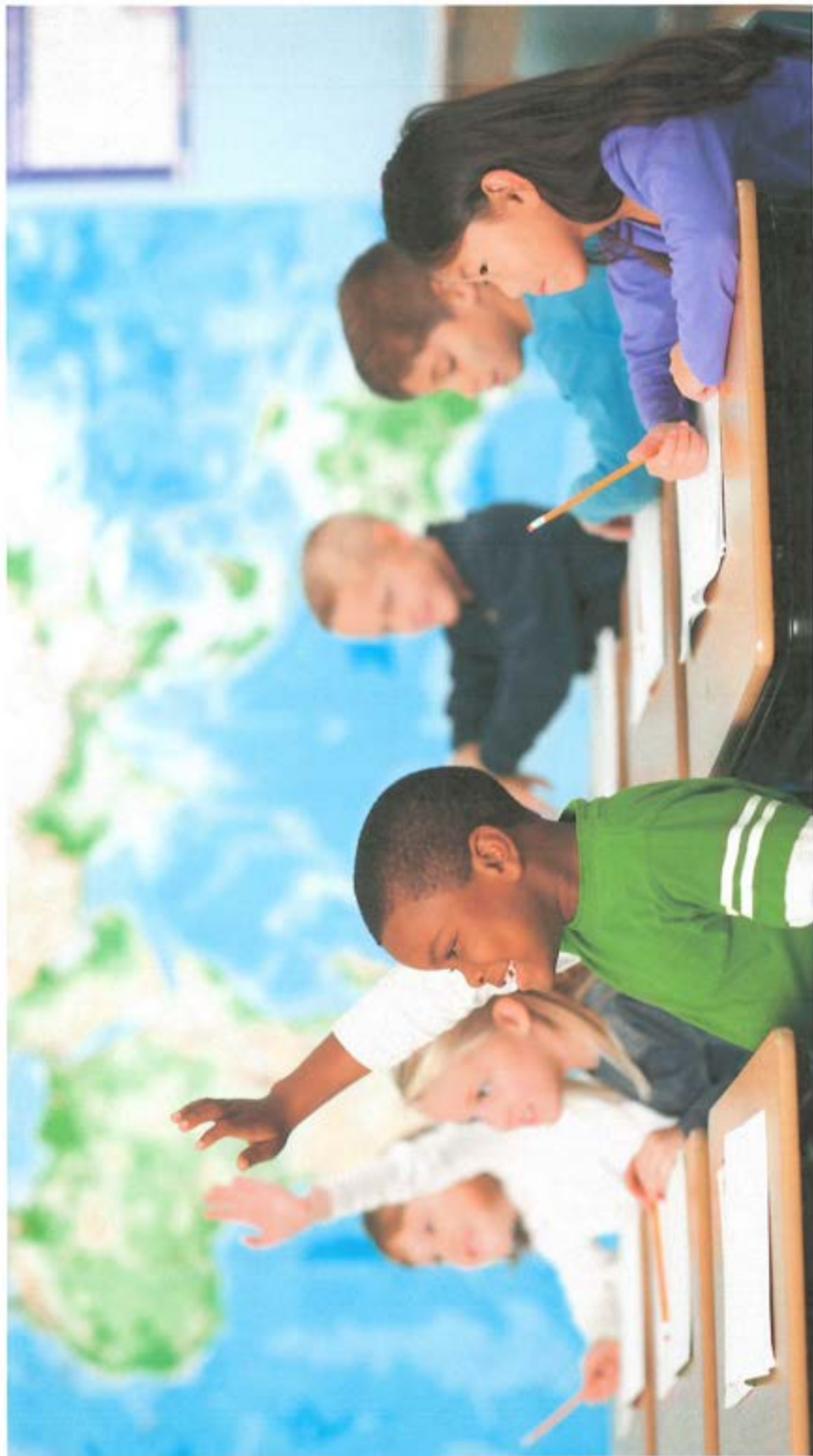
### ADULT MATERIALS

Adult print books	23,759
Periodicals, newspapers & other print serials	703
Audio (compact discs, cassettes, etc)	3,056
DVDs	4,333
E-books	96,511
Downloadable audio, (audiobooks, music, etc)	53,146

## Circulation as of June 30, 2022

### ADULT MATERIALS

Books	54,165
Print periodicals, newspapers and print serials	2,352
Audio	5,192
DVDs	21,000
E-books	17,706
Downloadable audio (audiobooks, music etc)	12,529
Reference Transactions	3,900



Holdings as of June 30, 2022  
YOUNG ADULT

Books	3,339
DVDs	569
Audio	30
Electronic Format	100

Holdings as of June 30, 2022  
CHILDREN

Books	10,421
Audio	614
DVDs	1,366
Electronic Format	264

Circulation as of June 30, 2022  
Children and Young Adult

Books	41,392
DVDs	5,154
Audio	3,321
Ebooks	2,191
Downloadable audio (books, music, etc.)	1,860



## Total Circulation Activity

Book	95,557
Print periodicals, newspapers & aother print serials	2,400
Audio	8,513
DVDs	26,193
Ebooks	19,897
Downloadable audio (audiobooks, music, etc)	14,389
Total number of all items circulated	172, 207
Total number of visitors	117, 000



# PROGRAMMING



## Programming Statistics

Adults	63
All ages	21
Teen	57
0-5	54
6-11	62

Recorded programs 41

Recorded program viewings within 30 days 12,456

**Total number of programs 257**

**Total attendance 3,549**

## Meeting Room Usage

Our rooms were used 393 times from October 2021 to September 2022 by community members for events, classes or programming. These included 3 different ESOL groups operating simultaneously serving Ukrainian and Afghan refugees and a wedding!

# Social Media



SURROUNDED BY THE FOREST

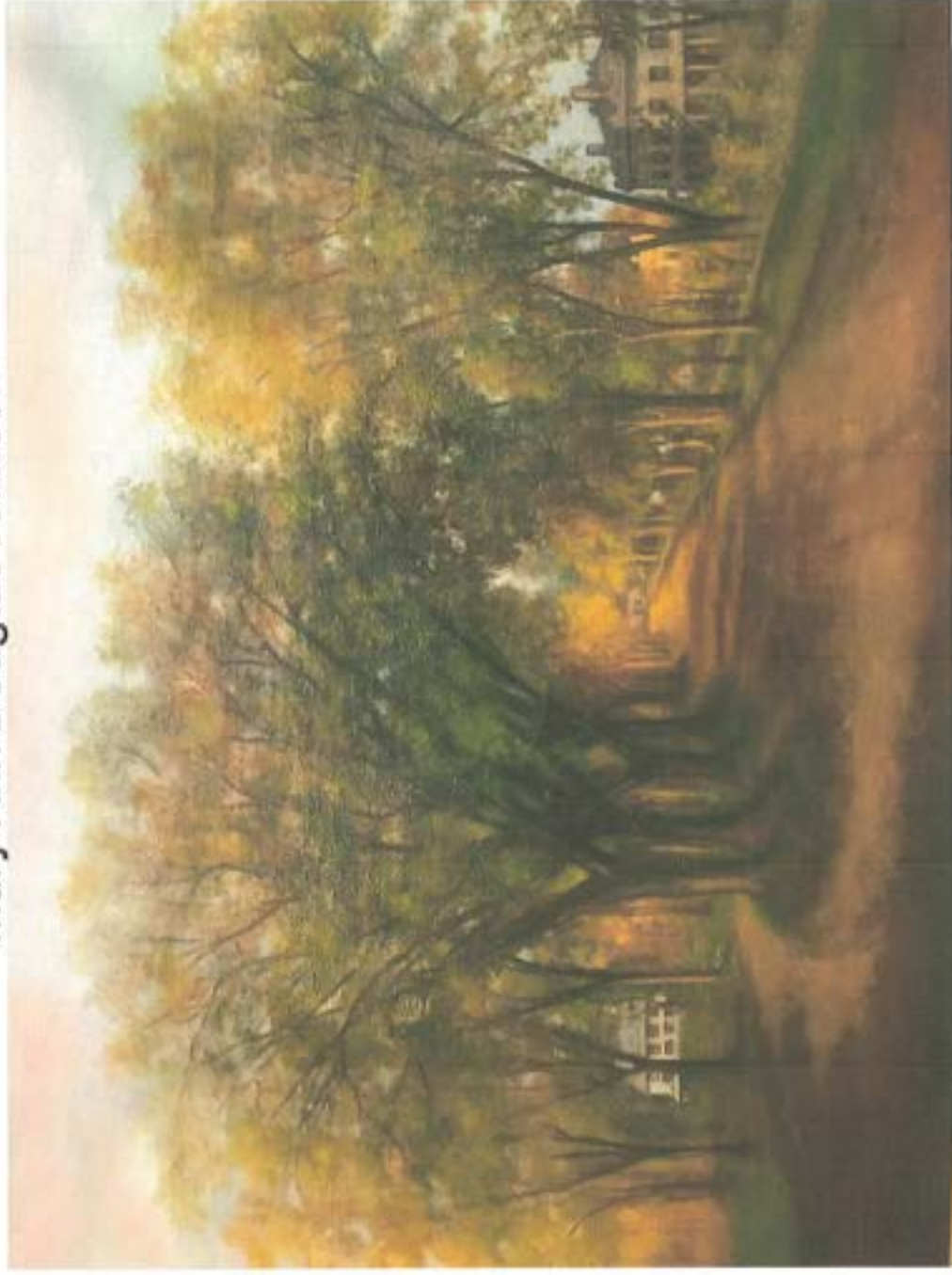


*The art of Ingun Russell*

# TREASURES OF THE ATHENAEUM

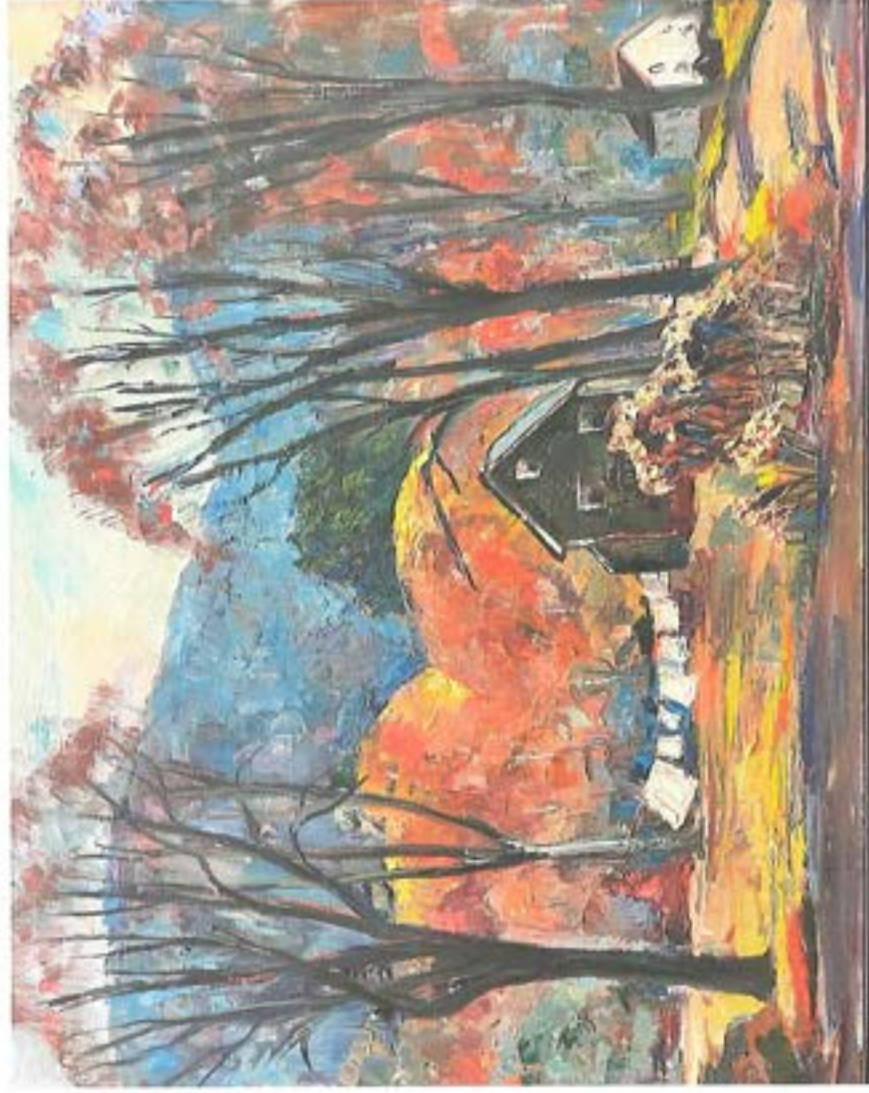


**"Court Street, Westfield"  
Mary Ann Douglas Johnson**





MURIEL RITCHIE



ELIZABETH CHADWICK



# CELEBRATING CREATIVITY



WESTFIELD STUDENT ART SHOW

GOLDEN RAIN: A FEMINIST SENSIBILITY IN AN ECLECTIC AGE



*Ruth Kjaer*

COLOR FIELDS: NEW EXPRESSIONS IN ABSTRACT LANDSCAPES

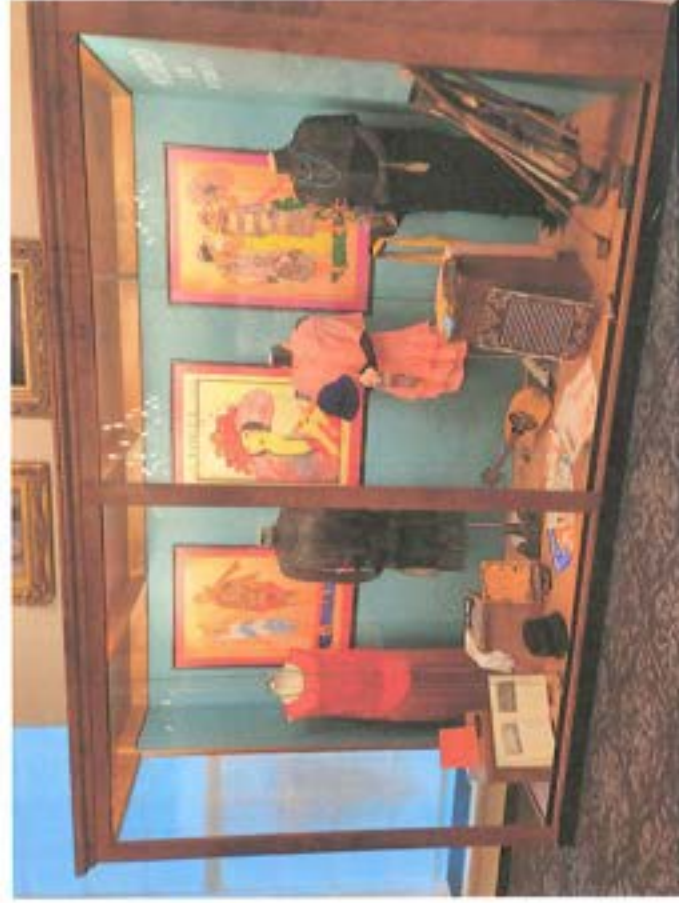


**LAURA RADWELL**

# PAINTINGS BY FRANK CRESSOTTI



# NEW REED ROOM EXHIBIT: The History of Westfield



# THE GRAND OPENING OF THE WESTFIELD HISTORY EXHIBIT







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**FY'22**

**WESTFIELD LIBRARY CARD HOLDERS** 16,067

**CIRCULATION:**

Print & Non-Print Materials 135,531  
     Adult 83,135  
     Young Adult 6,958  
     Children 45,438

Overdrive - E-Books & Audio 36,676  
     Adult 30,249  
     Young Adult & Children 6,427

Interlibrary Loan  
     Materials Requested by Patrons 14,549  
     Materials Loaned to other Libraries 12,066

Reference Questions Answered  
     Adults 3,900  
     Children's 2,498

Website Visits 98,417

**PROGRAMMING:** Number of Attendance  
Programs

Live/Zoom Programs  
     Adult/All Ages 84 1,127  
     Teen 57 727  
     Children 116 1,695

Recorded Programs 41 12,456

Make & Take Crafts (Sept-June) 11 crafts 225

Summer Reading 547 people who read for a total of 333,293 minutes

**ANALYSIS OF IN LIBRARY COLLECTION HOLDINGS:**

	<u>Print</u>	<u>Non-Print</u>	<u>Other</u>
Adult	26,617	8,132	4,050
Teen	3,767	560	1
Children	11,914	2,802	380