

2021

Annual Report

THE NEXT 30 YEARS

The **HOMER**  
FOUNDATION



# The HOMER FOUNDATION

## The Homer Foundation holds the following as core organizational values:

### COMMUNITY

- 🌱 We are committed to building a strong community.
- 🌱 We recognize the importance of equity, inclusivity and diversity.
- 🌱 We value engagement with all members of our service area.

### STEWARDSHIP

- 🌱 We prudently manage donated funds.
- 🌱 We responsibly and efficiently disburse funds to strengthen our community.

### INTEGRITY

- 🌱 We maintain the trust of donors and community through forthright communication and timely action.
- 🌱 Honesty and accountability will be synonymous with the Homer Foundation.

### RESILIENCE

- 🌱 We are responsive, innovative and adaptive in finding ways to strengthen our community.
- 🌱 We strive to endure for generations to come within a vibrant community.

OUR MISSION IS TO ENHANCE THE QUALITY OF LIFE FOR THE CITIZENS OF THE GREATER HOMER AREA BY PROMOTING PHILANTHROPIC AND CHARITABLE ACTIVITIES.

## CONNECT WITH US

Contact us to find out how we can help you achieve your philanthropic goals.

📞 907.235.0541

📍 3733 Ben Walters Lane  
Suite 7, Homer, AK  
lower level of the Rachemak Bay  
Title Building

📧 [info@homerfoundation.org](mailto:info@homerfoundation.org)

🌐 [www.homerfoundation.org](http://www.homerfoundation.org)

📘 Find us on Facebook

📷 Find us on Instagram

📧 [Subscribe](#) to our e-newsletter

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RESPONSE FOR TODAY, STRENGTH FOR TOMORROW

# 30 YEARS OF BUILDING

The way we look at it, we are now well into our second generation at the Homer Foundation (a “generation” being a group of people born within the same 15-20 years). In thirty years, we have learned a lot. One of the most important lessons is how to pass the organization on to new generations and make it stronger with each transition.

Homer was so different 30 years ago. We remain grateful for the vision of the Homer Foundation’s original donors. Every success we have is because of the dedication and foresight of those in that first generation of leaders. There was a real pioneer spirit at work in founding the first community foundation in Alaska, a true Alaskan spirit.

Much has changed since the first documents were signed in 1991: faces, seasons, graduations, strategies, economics, pandemics, on and on the list goes. Homer has grown and so has the foundation. One thing has not changed. The Homer Foundation remains committed for the long term to our local communities. We are here to stay. Our investments, our grants, our scholarships, our endowments, remain

focused on the long-term health of the community. The Homer Foundation intends to continue building, continue stewarding and continue growing for generations to come.

We want to thank you, our donors and friends for believing in the vision of a locally focused community foundation with its roots deep in the ground, for supporting the mission of local nonprofits, and for enhancing the life of people in this area. We will continue to plan and act for the long-term, strengthening the foundation and providing stability in the community. We will continue to act in line with our promise to the community to be here in perpetuity.

How do we feel about 30 years? We think it is a great start.

**Mike Miller**  
EXECUTIVE DIRECTOR

**Terri Spigelmyer**  
PRESIDENT, BOARD OF TRUSTEES

## STAFF



**Mike Miller**  
Executive Director



**Lauren Seaton**  
Executive Assistant



**Jane Miles**  
Volunteer Staff



**Julia Clymer**  
Accountant

A YEAR

# IN REVIEW

# 2021

**\$279,810**  
DISTRIBUTED  
IN GRANTS AND  
SCHOLARSHIPS

**87**  
QUICK RESPONSE  
GRANT AWARDS

**7**  
COVID-19  
RESPONSE GRANTS  
AWARDED

**23**  
SCHOLARSHIPS  
AWARDED

**389**  
TOTAL DONORS

**45**  
NONPROFITS  
SUPPORTED  
THROUGH  
GRANTS

**\$31,500**  
AWARDED  
THROUGH CITY OF  
HOMER GRANTS  
PROGRAM



THE HOMER FOUNDATION

# BOARD OF TRUSTEES



**Dave Derry**  
Trustee



**Liz Downing**  
Trustee



**Van Hawkins**  
Vice President



**Tom Kizzia**  
Secretary



**Flo Larson**  
Trustee



**Paula Martin**  
Treasurer



**Denise Pitzman**  
Development  
Committee Chair



**Paul Seaton**  
Community Grants  
Committee Chair



**Terri Spigelmyer**  
Board President



**Ken Taylor**  
Trustee



**Chris Theno**  
Trustee





## VAN HAWKINS VICE PRESIDENT

*This group of volunteer board members is ever-inspiring in their dedication to fulfilling the mission of the Homer Foundation. I am grateful for all that each individual brings to the table and appreciate working together towards our shared vision for our communities.*

### NEW BOARD MEMBERS

**Dave Derry:** Dave joined the board in 2020. Now semi-retired, he and his wife started Derry & Associates, a real estate appraisal firm in 1978 working throughout the Kenai Peninsula. He holds the MAI & AI-GRS professional appraisal designations, and AK Certified General appraiser #36. Through his valuation career, Dave brings a wealth of information about the Foundation's service area. He has always admired the involvement and community dedication in the Foundation's service area, something he does not see other places on the Peninsula. He is honored to serve as a board member to foster the Foundation's excellent reputation.

**Christine Theno:** Chris joined the board in 2021. Chris earned a PhD in Philosophy and is a retired educator, teaching every grade from kindergarten through University throughout her career. After she retired in 2013, she and her husband Steve moved to Homer. Chris has served on our scholarship and grants committees since 2018 and we value all of her expertise and knowledge she brings to our Foundation. She loves that it serves myriad needs in this wonderful community and that so many here are committed to generously supporting it each year. It really and truly is a foundation of this community,

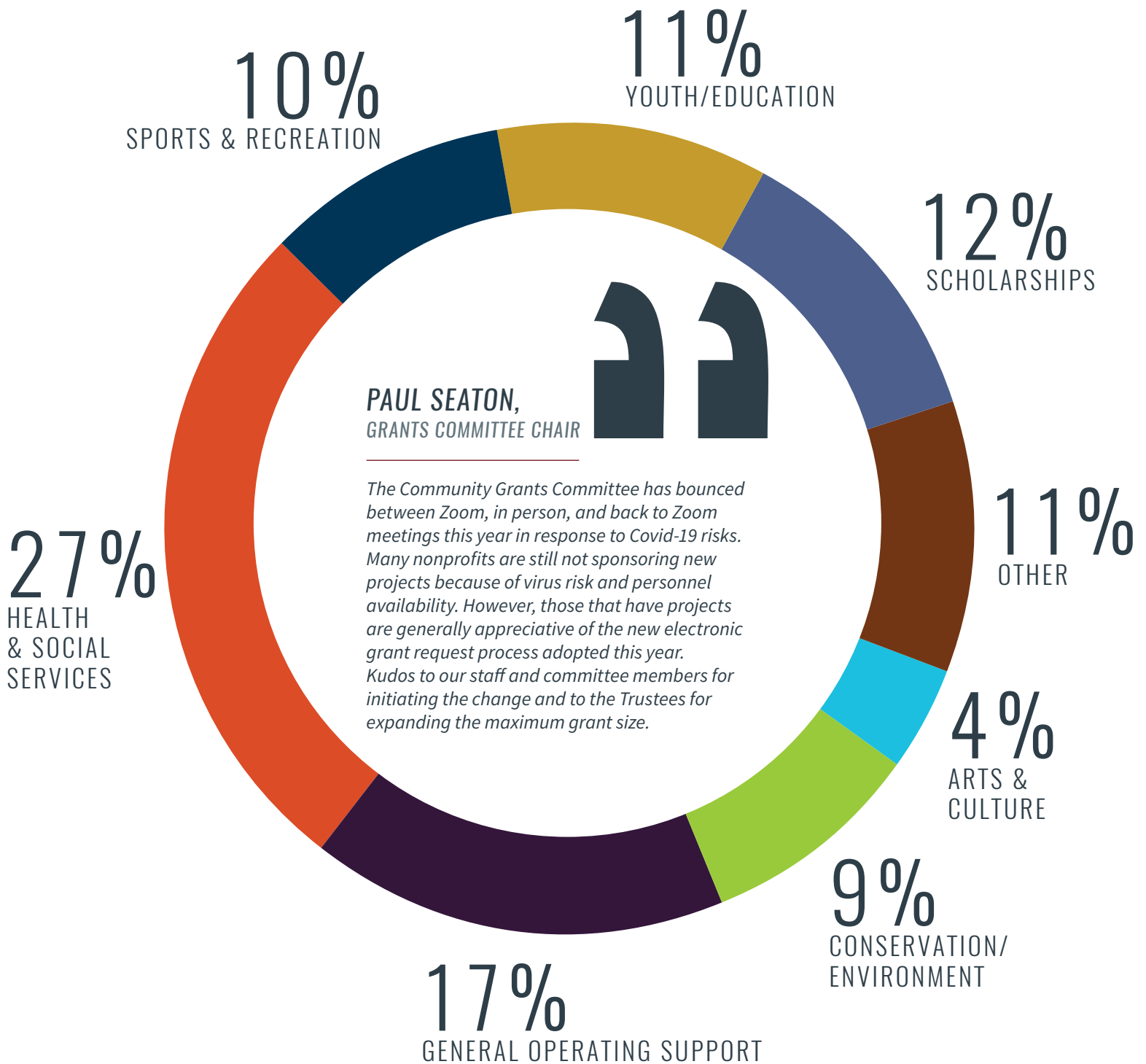
### PAST BOARD MEMBERS

Steve Albert  
 Connie Alderfer  
 Carolyn Bolar  
 Patti Carey  
 Ken Castner  
 Matt Clarke  
 Susan Cushing  
 Mary Epperson  
 Elaine Grantier  
 Polly Hess  
 Renda Horn  
 Bonnie Jason  
 Tom Keffer  
 Ann Keffer  
 Buck Laukitis  
 Jack Lentfer  
 Phil Morris  
 John Mouw

Curt Olson  
 Mike Pate  
 Ron Pavellas  
 Lance Petersen  
 Will Peterson  
 Chris Robinson  
 Ron Senungetuk  
 Mike Stassen  
 Joan Stempniak  
 Joy Steward  
 Luana Stovel  
 Carol Swartz  
 Gary Thomas  
 Dan Westerburg  
 Virginia Wise  
 Lindsay Wolter  
 Steve Yoshida

2021

# GRANTS





**ARTS & CULTURE  
\$11,400**

**Ashley J. Logan Fund**  
Homer Council  
on the Arts..... \$1,341.25  
*Art from the Heart*

**Cottonwood Fund**  
Storyknife  
Writers Retreat..... \$2,000  
*General Operating Support*

**Jessica M. Stevens Memorial Fund**  
Homer Council  
on the Arts.....\$351.76  
*Art from the Heart*

**Opportunity Fund**  
Alaska World  
Arts Festival..... \$2,500  
*Alaska World Arts Festival*

Homer Council  
on the Arts.....\$556.99  
*Art from the Heart*

Homer Council  
on the Arts..... \$750  
*Executive Leadership Initiative*

Pier One Theatre..... \$1,400  
*Youth Theatre Camps*

**CONSERVATION &  
ENVIRONMENT \$25,500**

**Cottonwood Fund**  
Kachemak Bay  
Conservation Society..... \$500  
*Drawdown: Peat Project*

**Gooseberry Fund**  
Kachemak Nordic  
Ski Club..... \$2,500  
*Eveline Mowing Summer 2021*

Friends of Kachemak  
Bay State Park..... \$1,000  
*Tool Acquisition*

**Martha H. Briscoe Environmental  
Science and Conservation Fund**  
Kachemak Heritage  
Land Trust..... \$2,500  
*Disaster Planning and  
Pandemic Needs*

Homer Soil and  
Water District..... \$5,000  
*Homer Seed Library*

**Opportunity Fund**  
Friends of Kachemak  
Bay State Park..... \$2,500  
*Water Trails Website*

**Willow Fund**  
Kachemak Bay  
Conservation Society.. \$11,500  
*Drawdown: Peat Project*

**EDUCATION \$15,400**

**David and Mary Schroer Fund**  
Homer Flex School..... \$500  
*Art and Social Studies  
Program Supplies*

Homer High School..... \$2,000  
*Positive Behavior Supports*

Homer Middle School.. \$3,000  
*Basketball Uniforms*

McNeil Canyon  
Elementary School..... \$3,000  
*Reading Programs*

Paul Banks School..... \$3,000  
*Library Upgrades*

West Homer Elementary\$3,000  
*SMARTboards for  
5th/6th grade classrooms*

**Homer Incentive Fund**  
Homer Flex School..... \$900  
*Art and Social Studies  
Program Supplies*

**GENERAL OPERATING  
SUPPORT \$46,914**

**Agency Endowment Annual  
Distribution**  
Alaska Marine  
Conservation Council . \$246.29

Bunnell Street  
Art Center..... \$287.14

Center for Alaskan  
Coastal Studies..... \$1,924.81

Friends of the Homer  
Public Library..... \$2,589.07

Homer Animal Friends \$401.47

Homer Community  
Food Pantry.....\$582.24

Homer Council  
on the Arts.....\$264.89

Homer Mariner Fastpitch  
Softball Fund.....\$584.26

Hospice of Homer... \$1,177.04

Kachemak Bay Family  
Planning Clinic..... \$394.05

Kachemak Heritage  
Land Trust.....\$827.55

KBBI..... \$1,033.14

Pratt Museum.....\$852.61

Storyknife  
Writers Retreat..... \$1,049.09

**City of Homer Grants**  
Bunnell Street  
Art Center..... \$1,000

Center for Alaskan  
Coastal Studies..... \$1,000

Cook InletKeeper..... \$1,000

Homer Community  
Food Pantry..... \$5,500

Homer Council  
on the Arts..... \$2,000

Homer Farmers Market \$4,500

Homer Hockey  
Association..... \$2,000

Hospice of Homer..... \$3,500

Kachemak Bay Family  
Planning Clinic..... \$3,500

Kachemak Heritage  
Land Trust..... \$1,000

Kachemak Nordic  
Ski Club..... \$1,000

Kachemak Pony Club... \$1,000

KBBI..... \$3,500

SPROUT..... \$1,000

**Employee Giving Matching  
Program**  
Anchor Point  
Food Pantry..... \$500

**General Operating Support  
David and Mary Schroer Fund**  
KBBI..... \$1,200

**People's Choice Award  
Opportunity Grants Reserve**  
Friends of the  
Homer Public Library..... \$500

Homer Community  
Food Pantry..... \$500

South Peninsula  
Haven House..... \$500

**HEALTH & SOCIAL  
SERVICES \$74,359**

**Bluegrass Fund**  
Anchor Point  
Food Pantry..... \$1,515.78  
*Anchor Point Food  
Pantry Decal on Truck.....*

Homer Community  
Food Pantry..... \$54,559.42  
*Emergency Non-Food Aid*

**KLEPS Fund**  
Kenai Peninsula  
Fair Association..... \$1,300.00  
*Computer & ADA desk*

**Opportunity Fund**  
Anchor Point  
Food Pantry.....\$984.22  
*Anchor Point Food  
Pantry Decal on Truck*

**SPORTS & RECREATION  
\$26,600**

**Girl Scouts Travel Fund**  
Kachemak Bay  
Running Club..... \$1,250  
*Drawdown: Steens  
Running Camp*

**Gooseberry Fund**  
Friends of the  
Homer Skate Park... \$1,599.79  
*Homer Skate Park  
Revitalization Project*

**KLEPS Fund**  
Kachemak Bay  
Running Club..... \$1,250  
*Drawdown: Steens  
Running Camp*

**Opportunity Fund**  
Kachemak City..... \$20,000  
*Kachemak City  
Playground Repair*

Friends of the  
Homer Skate Park..... \$2,500  
*Homer Skate Park  
Revitalization Project*

**YOUTH PROGRAM  
\$15,240.70**

**Brother Asaiah Bates Fund**  
Homer Head Start... \$2,490.70  
*New Chairs*

**David and Mary Schroer Fund**  
Homer Foundation Youth  
Advisory Committee.... \$1,000  
*YAC*

Pratt Museum..... \$1,000  
*School Field Trip Program*

Big Brothers Big  
Sisters in Homer..... \$500  
*COVID-19 Safe Activity Kits*

Homer Mariner Fastpitch  
Softball Fund..... \$500  
*Equipment Purchase*

Homer High School  
Mariner Booster Club... \$1,000  
*Athletic Program Support*

**Gooseberry Fund**  
Center for Alaskan  
Coastal Studies..... \$1,000  
*Inspiring Girls to Reach for the  
Stars program*

**Jack and Mary Lentfer Fund**  
Friends of the Homer  
Public Library..... \$951.77  
*Summer @ HPL Artist  
in their Residence*

**JEMCO Fund**  
Pier One Theatre .... \$1,100.00  
*Summer Theatre Program*

**KLEPS Fund**  
SPROUT..... \$2,250  
*Ensuring IT Infrastructure*

Center for Alaskan  
Coastal Studies..... \$2,000  
*Inspiring Girls to Reach  
for the Stars program*

Friends of the Homer  
Public Library..... \$1,448.23  
*Summer @ HPL Artist  
in their Residence*

**COVID-19 RESPONSE  
GRANTS \$16,000.00**

**Homer Foundation COVID-19  
Response Fund**  
American Cancer  
Society..... \$2500

Anchor Point  
Food Pantry..... \$2500

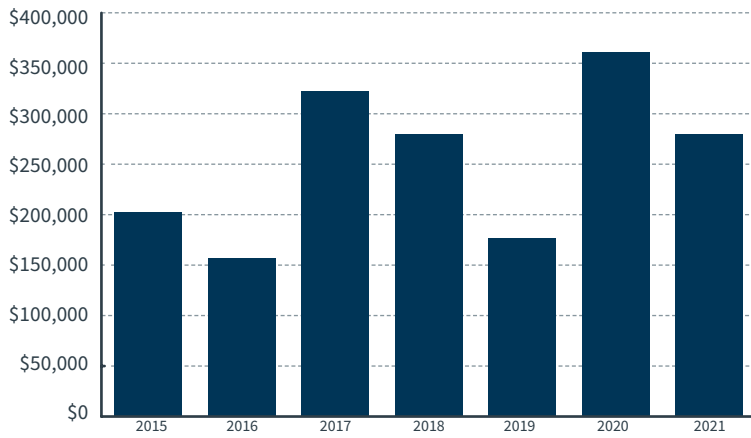
Bunnell Street  
Arts Center..... \$2500

Homer Council  
on the Arts..... \$1000

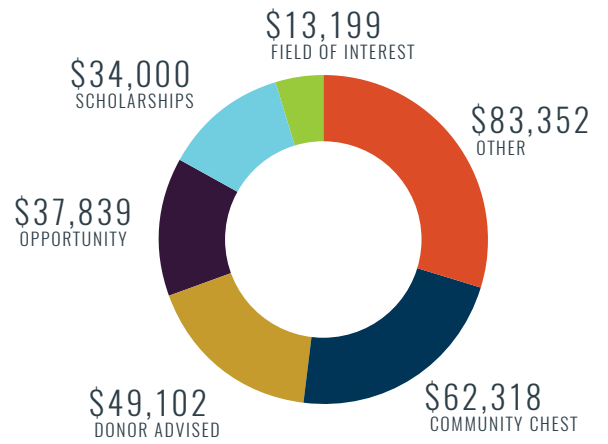
Homer Farmers Market . \$2500

Homer High School..... \$2500

### ANNUAL COMMUNITY GRANTS DISTRIBUTION



### GRANTS BY FUND TYPE



**Total \$279,810**



## PEATLAND PROJECT SUMMARY

# GLOBAL ISSUE: COMMUNITY RESPONSE

After 9 months of discussing the climate solutions presented in Paul Hawken’s book “Drawdown: The Most Comprehensive Plan Ever Proposed to Reverse Global Warming”, community members voted to take on the grassroots project in what would become known as the “Homer Drawdown: Peatland Project.” Kachemak Bay Conservation Society became the lead organizer for this project, and has been working since 2019 to make this collective dream become a reality.

Homer Drawdown: Peatland Project’s mission is to “drawdown,” or sequester, carbon through community science, conservation and restoration of peatlands on the Southern Kenai Peninsula. Kachemak Bay Conservation Society educate and advocate for peatlands as they relate to the global carbon cycle and foster a sense of cultural stewardship that honors the incredible value of peatlands to our local communities, ecosystems, economies, and climate stability. This grassroots project, which currently reaches over 200 community members, seeks to “put peat on the map” through cross-sector engagement on the Southern Kenai Peninsula from March 2021 through June 2022. This engagement will take place through surveying and mapping of peatlands, art and cultural projects, education curriculum development, a rehabilitation trail project in Caribou Hills, and conservation of peatlands.

This project is an incredibly collaborative project, bringing together Kachemak Bay National Estuarine Research Reserve, Bunnell Street Arts Center, Cook Inletkeeper, Kachemak Heritage Land Trust, Homer Soil and Water, and Center for Alaskan Coastal Studies, not to mention the hundreds of volunteers and community members who will participate in this project. This project will collect valuable data to be used to direct ongoing conservation efforts. It is all expected that full spectrum of our efforts will influence the way managers and representatives think about peatlands. While peat has not been considered as a resource before, they are working to establish its enormous value.

Kachemak Bay Conservation Society received \$12,000 in grant funding from the Homer Foundation to help make this project happen.



THE HOMER FOUNDATION IS PROUD TO BE THE LARGEST LOCAL AWARDER OF SCHOLARSHIPS.



20 SCHOLARSHIPS



12 STUDENTS



7 AREA SCHOOLS



\$34,000 DISTRIBUTED

SCHOLARSHIPS

# \$34,000 AWARDED TO AREA STUDENTS

This year the Homer Foundation awarded nineteen scholarships totaling \$34,000 to area students. These scholarships are supported by permanent endowments administered by the Homer Foundation and would not be possible without the vision and generosity of community donors. Since the Foundation began administering scholarships in 2000, it has awarded 311 individual scholarships totaling \$372,497.

“These scholarships have value well beyond the monetary. They also send the important message to each recipient and their family: ‘You have a future and we believe in you’ ” said Homer Foundation Executive Director Mike Miller.

The success of the Foundation’s scholarship program depends on our school counselors and staff who are on the front line, connecting students to scholarship applications, and the dozens of volunteers who make up these committees, sharing their time and expertise

to read and rate applications, assuring a fair and equitable selection process.

Because of the donors who had the vision to establish these scholarships, and the community members that continue to support them, these endowed funds will be here to support the education of our youth far into the future. Tax exempt donations to support these scholarships, or any of the 68 funds managed by the Foundation, are appreciated and will help extend the reach of this amazing local program.

## CONGRATULATIONS TO THE 2021 RECIPIENTS

**Beluga Tale Nonfiction Writing Scholarship**

Eleanor Sweeney..... \$3,000  
Zoe Stonorov ..... \$3,000

**Bill & Liz Johnson Teacher Education Scholarship**

Madison Story ..... \$1,000

**Diane Wambach “Shoot for the Stars” Scholarship**

Karen Lasiter..... \$1,000

**Drew Scalzi Memorial Maritime Scholarship**

Brianna Wise..... \$1,000  
Isabel Kulhanek ..... \$500  
Karen Lasiter..... \$500  
Owen Glasman ..... \$1,000

**Educators Professional Development Scholarship**

Deb Curtis ..... \$1,000  
Stephanie Zanati..... \$500  
Daniel Newsted..... \$500

**Fish and Wildlife Scholarship**

Ty Etwiler..... \$2,000

**Health Care Providers Scholarship**

Karen Lasiter..... \$3,000  
Jessica Sonnen..... \$2,500

**Heather Pancratz Memorial Scholarship**

Karen Lasiter..... \$500

**Homer Community Science Scholarship**

Grace Godfrey..... \$1,500  
Ty Etwiler..... \$1,000

**Kachemak Medical Group Scholarship**

Karen Lasiter..... \$2,000

**Nikki Geragotelis (Fry) Memorial Scholarship**

Grace Godfrey..... \$6,000

**Nursing Studies Scholarship**

Brianna Wise..... \$1,500

**Ptarmigan Arts Visual Arts Scholarship**

Ella Blanton-Yourkowski ..... \$750  
Vianne Sarber..... \$1,250

**Sutton James Miller Memorial Scholarship**

Brianna Wise..... \$1,000



**Ty Etwiler** is attending College of Southern Idaho in pursuit of a degree in Applied Science in aquaculture. Ty received the Fish & Wildlife Scholarship as well as a Homer Community Science Scholarship. “Thank you for selecting me as a recipient of these scholarships. They are very generous that I will use to help pay for tuition this coming school year. Thank you again for selecting me.”



**Grace Godfrey** is attending Central Washington University where she will be studying Healthcare and Life Sciences. Grace is the Recipient of the Homer Community Science Scholarship as well as the Nikki Geragotelis (Fry) Memorial Scholarship. “Thank you so much for awarding me these scholarships. I will be using the award to help fund my degree in biology in pursuance of pre medicine. Thank you again for your generosity; I feel honored to be the recipient of your awards. ”



**Madison Story** is attending the University of Utah to study Elementary Education. Madison was the recipient of our Bill & Liz Johnson Teacher Education Scholarship. She says “Thank you for doing me the honor of awarding me a scholarship to pursue a career in education. I appreciate you giving back to the youth of Homer by funding their dreams.” Madison is also an athlete, swimming for the Utes at the collegiate level.



**Brianna Wise** is attending University of Alaska Southeast pursuing a degree in Nursing. She is the recipient of the Sutton James Miller Memorial Scholarship, Drew Scalzi Memorial Maritime Scholarship, and the Nursing Studies Scholarship. “Thank you so much for giving me this opportunity to follow my dreams to study Nursing and Sign Language in Juneau, Alaska. These scholarships mean a lot to me and will be used well.”

30 YEARS  
**IN REVIEW**

The **HOMER**  
FOUNDATION



**\$3.6 MILLION** DISTRIBUTED IN GRANTS AND SCHOLARSHIPS



**1858** QUICK RESPONSE GRANTS AWARDED



**311** SCHOLARSHIPS AWARDED



**\$372,497.42** AWARDED IN SCHOLARSHIPS



**1221** TOTAL DONORS



**88** NONPROFITS SUPPORTED THROUGH GRANTS



**OVER \$860,000** AWARDED THROUGH CITY OF HOMER GRANTS PROGRAM



**5** MAJOR FISCAL SPONSORSHIPS  
New Homer Public Library, Karen Hornaday Playground Project, Boat House,  
Kachemak City Playground Repair Project, Homer Skate Park Revitalization Project

**TENS OF THOUSANDS OF LIVES TOUCHED**

# 30 years



## COMMUNITY PHILANTHROPY

*We are proud of all our grants awarded over the last 30 years. Here are all of the organizations who have received grants from the Homer Foundation.*

Alaska Chapter US Green Building Council  
Alaska Coalition for Veterans and Military Families  
Alaska Community Action on Toxics  
Alaska Community Foundation  
Alaska Conservation Foundation  
Alaska Marine Conservation Council  
Alaska World Arts Festival  
Alaska Youth for Environmental Action/Homer Club  
American Cancer Society  
Amigos de Maria AC  
Anchor Kings Wrestling Club  
Anchor Point Food Pantry  
Anchor Point Senior Citizens, Inc  
Best Beginnings  
Big Brothers Big Sisters in Homer  
Boy Scouts Troup  
Boys & Girls Club  
Bunnell Street Art Center  
Center for Alaskan Coastal Studies  
Chapman School  
City of Homer  
Clave Folk Music  
Connecting Children with Nature  
Cook Inlet Council on Alcohol & Drug Abuse CICADA  
Cook InletKeeper  
Daniel Boone  
Fireweed Academy  
Friends of Kachemak Bay State Park

Friends of the Homer Fishing Hole  
Friends of the Homer Health Center  
Friends of the Homer Public Library  
Friends of the Homer Skate Park  
HANDS  
Homer Animal Friends  
Homer Boat House Project  
Homer Chamber of Commerce  
Homer Community  
Homer Community Recreation  
Homer Council on the Arts  
Homer Cycling Club  
Homer Farmers Market  
Homer Flex School  
Homer Future Farmers of America  
Homer Head Start  
Homer High School  
Homer High School Mariner Booster Club  
Homer Hockey Association  
Homer Imagination Library  
Homer Kachemak Bay Rotary Club  
Homer Lead On! Youth Group  
Homer Little League  
Homer Mariner Fastpitch Softball Fund  
Homer Middle School  
Homer OPUS  
Homer Playground Project  
Homer Senior Citizens Inc  
Homer Soil and Water District  
Homer Youth Court  
Hospice of Homer  
HoWL  
HYPE

Junior Achievement of Alaska, Inc  
Kachemak Bay Campus(UAA)  
Kachemak Bay Conservation Society  
Kachemak Bay Equestrian Association  
Kachemak Bay Family Planning Clinic  
Kachemak Bay Girl Scouts  
Kachemak Bay Lions Club  
Kachemak Bay Research Reserve  
Kachemak Bay Running Club  
Kachemak Bay Water Trails Committee  
Kachemak Bay Wooden Boat Society  
Kachemak Heritage Land Trust  
Kachemak Kids Early Learning Center, Inc  
Kachemak Nordic Ski Club  
Kachemak Pony Club  
Kachemak Swim Club  
KB Envirn.Ed.Alliance  
KBBI  
Kenai Peninsula Borough School District  
Kenai Peninsula Fair Association  
Kenai Peninsula Food Bank  
Kenai Peninsula Housing Initiative  
Kenai Peninsula Independent Living Center  
Kenai Peninsula Orchestra  
Kenai Peninsula Safe Kids Coalition  
Maritime Enterprises  
McNeil Canyon Elementary School  
Nanwalek IRA Council

National Alliance for the Mentally Ill  
Nikolaevsk School  
Ninilchik Community Library  
Ninilchik Senior Citizens, Inc  
Northern Communities Vitamin D Group  
Otter Beach Educational Center (Closed)  
Paul Banks School  
Pier One Theatre  
Popeye Wrestling Club  
Pratt Museum  
Razdolna Elementary School  
Refuge Chapel  
Rotary Club of Homer Downtown  
SAH Soccer Inc  
Share the Spirit  
Snomads  
South Peninsula Behavioral Health Services  
South Peninsula Haven House  
Southern Kenai Peninsula Communities Project  
Special Olympics of Alaska Homer Branch  
SPROUT  
St John the Baptist Catholic Church  
Storyknife Writers Retreat  
Sustainable Homer  
The Homer Foundation  
Town Square Project  
Transportation Task Force  
Vessels of Hope  
Volunteers of America  
Voznesenka Community Council Inc  
Voznesenka School  
West Homer Elementary



2015 BUNNELL STREET ARTS CENTER



2011 HOMER YOUTH STRING ORCHESTRA CLUB

The **HOMER**  
 FOUNDATION  
 30 YEARS OF COMMUNITY PHILANTHROPY

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**\$3,681,439.84**



2017 OPUS







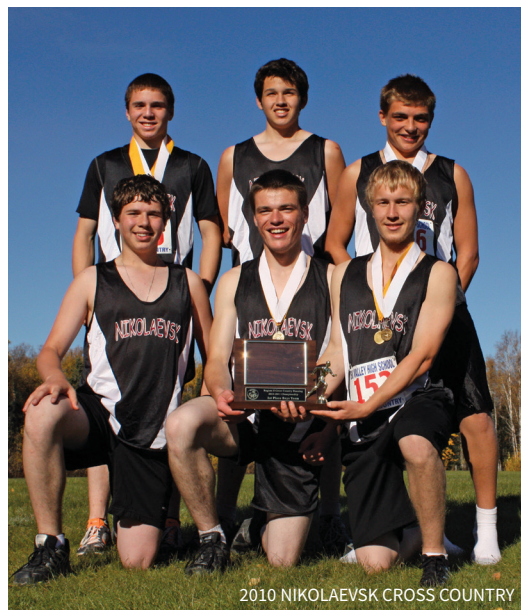
2012 HOMER PLAYGROUND PROJECT



2019 HOWL



2018 GIVING SALMON



2010 NIKOLAEVSK CROSS COUNTRY



IF YOU HAVEN'T YET SEEN TOM KIZZIA'S ARTICLES IN THE HOMER NEWS, BE SURE TO READ THEM ON OUR WEBSITE SO YOU CAN SHARE IN THE INSPIRING STORIES OF PHILANTHROPY.

COMMUNITY IMPACT

# 30 YEARS OF GIVING

## *FRIENDS OF THE HOMER PUBLIC LIBRARY*

This awesome group does many wonderful programs in coordination with the Homer Public Library, and we love being able to support the importance of creating a culture of lifelong learning within our community. Past President Andy Haas says, “The Friends of the Homer Library would like to thank the Homer Foundation for all of its wonderful help over the years. With over \$229,00 in assistance, we have built a new library; received dividends on our endowment fund; and operated such programs as the summer children’s reading program and the roaming bookmobile. We love our Homer Foundation!”

## *HOMER COMMUNITY FOOD PANTRY*

Homer Community Food Pantry provides critical essential service and the Homer Foundation is proud to support this organization. They have received over \$235,000 since 1995. Along with emergency food, they are our community partner for our Community Chest Fund, which supports the Emergency Non-Food Aid Program. Board President Thomas McDonough states, “The Homer Foundation has been a wonderful and integral partner with the Homer Community Food Pantry. With your help via the Community Chest grant, together we have helped hundreds of our local residents with basic needs that many of us take for granted. These funds provide for a diversity of needs including showers and laundry services, home heating, electricity, and car repair for those on the edge; but they also provide hope.” Thank you Homer Community Food Pantry for the tremendous impact you have in our community!

## *HOMER COUNCIL ON THE ARTS*

This organization was one of the first to receive a grant from the Homer Foundation, and they have received over 100 grants since 1993. Executive Director Scott Bartlett says, “Homer Council on the Arts is immensely grateful for the long-term support of the Homer Foundation. The Foundation has supported a broad range of education programs, including ArtQuest workshops, HomerARTS Camp, Summer Music Camp, Circus Arts, and Youth Art Scholarships; made possible multifaceted projects including the Dance and Aerial Festival and New Old Time Chautauqua tour; and provided operational support in conjunction with the City of Homer. We’re excited about our most recent project, fostering intergenerational connections through visual art and performance during the coronavirus pandemic. Thank you to the Homer Foundation, the Youth Advisory Committee, and advising donors for supporting the arts in our community!” Thank you HCOA for all that you have provided to keep art thriving on the Southern Kenai Peninsula.



## HOMER HOCKEY ASSOCIATION

Homer Hockey Association has received \$122,209 from the Homer Foundation over the years. President Charlie Stewart, “The Homer Hockey Association, which owns and maintains the Kevin Bell Arena, has benefited greatly from our relationship with the Homer Foundation. As one of the few nonprofit ice rinks in the country, it is essential for us to procure and show local support for continued operations. Over the past 15 years, we have received funds that benefit the greater Homer community with grants for: LED lighting conversion, aluminum learn to skate aids, MicroBell gear, a girls hockey camp, figure skating program startup and general operating funds. Along with their financial support, they also provide our nonprofit a local resource for board development and grant making guidance. When we work through grant requests to the Homer Foundation it provides important experience for us when we get an opportunity to try to apply for grants from other foundations. The Homer Foundation has not only helped us financially to continue to provide safe, healthy winter recreation for school groups, the general public, hockey players, home ice for the Mariner Co-Op hockey team, figure skaters, recreational skaters, broomballers and curlers; but they have also helped in our education and understanding of the ways to navigate professionally in the nonprofit sector.” We are honored to help preserve these winter sport of our community.



## HOSPICE OF HOMER

Located in Homer, but serving the southern Kenai Peninsula, this organization provides essential services for our residents. The Board President Charlie Franz summarizes the impact well, “The support the Homer Foundation has provided to Hospice of Homer has been outstanding. Over the past several years, Hospice has received funding to help with general operations to continue loaning medical equipment to members of the community as well as providing a variety of services to individuals who are frail, homebound or facing end of life issues. The Foundation has also helped with recent needs specific to dealing with the Covid virus such as purchasing an upholstery cleaner so we can make sure upholstered equipment is properly cleaned between users. The Homer Foundation has contributed in many ways to support the mission of Hospice and we are very appreciative of our relationship.” We’re proud to help them support our neighbors in the time of great need.

## PRATT MUSEUM

The Pratt Museum has received over \$340,000 in grants from the Homer Foundation and our family of funds. Jennifer Gibbons, the Executive Director, said “At the heart of the Pratt Museum and the Homer Foundation is a shared commitment to help community members connect around the vital role that we can all play in each other’s lives. This is what both organizations love to do! Over the past 25-plus years, the Pratt Museum has received over \$340,000 in support from the Foundation for our intern program, school field trips, educational and cultural community programs, general operating support and more! We can’t possibly be thankful enough for this partnership. This funding contributes to our bottom line and also helps to make connections between the Pratt Museum and individual donors as well as foundations and other funding agencies.”

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COMMUNITY IMPACT

# NEW FUNDS

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## ***ROBINETTE SCHOLARSHIP***

Joyce Robinette was a quietly generous soul who loved teaching, birds, and biology. She was a Legacy Society member and this scholarship was created through a generous bequest gift when she passed away. Out of respect for what we now understand to be the donor's quiet and private life, we have not made a large public pronouncement of this generous gift and the scholarship that bears her name. She loved Homer, Alaska and its natural beauty that inspired her own curiosity for the environmental world. This fund will honor that life's passion through a needs based scholarship for students studying physical or biological sciences. The first award will be granted spring 2022 to a bright student from the Southern Kenai Peninsula. The Homer Foundation welcomes this new fund to our family and are proud to support this worthy endeavor!

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## ***FRIENDS OF THE HOMER PUBLIC LIBRARY NON-ENDOWMENT FUND***

The Friends of the Homer Public Library was incorporated in 1982 to help with library programming and has continued to do so for nearly 40 years. This past year the Friends of the Homer Public Library Board voted to create a non-endowed fund to support future library programming, literacy outreach and community events that support lifelong learning. When the Homer Foundation offered a non-endowment fund, the Friends were eager to take advantage of the opportunity to access principal at any time. Additionally, the new fund supports the valuable work of the Homer Foundation in the community.

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## ***KACHEMAK NORDIC SKI CLUB STEWARDSHIP FUND***

Kachemak Nordic Ski Club was happy that the Homer Foundation could accept management of the club's designated funds. Most of the money in the Kachemak Nordic Ski Club fund at the Homer Foundation is designated by the Board of Directors of KNSC as an operating reserve. The remainder consists of a relatively small amount designated by the estate of a donor for a currently unaffordable purchase. KNSC lacked the organizational capacity to manage the funds for growth, so the money lingered on KNSC's balance sheet losing relative value due to inflation. The Homer Foundation has filled an important gap for KNSC by taking on management of these designated funds. Now the money can grow instead of losing value to inflation, the Kachemak Nordic Ski Club fund can be added to by donors, and KNSC can potentially benefit from future income.

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## ***JULIE BOOTH ULMER MEMORIAL FUND***

The Julie Booth Ulmer Fund was started as a donor advised fund this year from a donor in our community to provide funding to organizations and programs helping young people (generally 23 years old or younger) in need who have shown determination to better themselves and their situation.

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*Contributions to any of the existing funds managed by the Foundation are an excellent way to support your community. These donations support the sustainability and resiliency of our community through long-term philanthropy fostered by the Homer Foundation. Donations can be either with a lifetime gift, through a bequest, or consider establishing your own fund to support your most cared about causes. Contact the Homer Foundation to learn more.*



BILL AND DOROTHY FRY

# CHOOSE THE HOMER FOUNDATION

**Nikki was special. Everyone knew that right away. Losing her was unbearable save for the two-year old son she left us.**

The Nikki Geragotelis (Fry) Memorial Scholarship Fund is a way to help people remember and think about Nikki. Her empathy, her character, and her courage.

The committee members that award the scholarship each year were her teachers, friends, neighbors, and co-workers that loved her. We appreciate this, they know that we hope they select a candidate based on character, not simply the highest GPA. Having a locally run community foundation allows that.

It is the type of memorial that fits her. She is still helping people that need it.

We recommend a scholarship fund for folks that want to build a living memorial that benefits the young. To let applicants know we believe in them.

The Homer Foundation makes it seamless by providing an institution that manages the fund, provides timely reports and facilitates committee meetings and the awards distribution. The Homer Foundation is terrific.



HOMER FOUNDATION LEGACY SOCIETY

# CELEBRATING GENEROSITY. SECURING THE COMMUNITY'S FUTURE.

*The Homer Foundation is proudly growing our Legacy Society. We recognize the following individuals to our listing of Legacy Society members, and thank them for their vision and generosity. If you have arranged for a future gift to the community through the Homer Foundation we would like to shine a light on your generosity and include you as a Legacy Society member.*

Anonymous	Robert & Melon Purcell
Philemon Morris	Jenny Stroyeck & Michael Armstrong
Tom Kizzia	Randy Wiest
Joy Steward & Stuart Schmutzler	Daniel Perry
Janet Fink	Martha Briscoe
Ken Castner & Nancy Lord	Richard & Marylou Burton
Bill & Dorothy Fry	Donna Rae Faulkner & Don McNamara
Joyce Robinette	Kathy & Roger Herrnsteen
Will Files & Marthaellen Anderson	Kathryn Thompson
Kathy Hill	Christa Collier
Janet M. Knutson & Edward W. Hutchinson	Paul & Tina Seaton
Kim Fine & Max Mitchell	Denise & Gordon Pitzman
Peggy Price & Kathy Franz	Ken & Chow Taylor
The Clyfus Family	Paula & Joe Martin
Flo Larson	Rand & Lauren Seaton
Terri Spigelmyer	Jeannie Woodring & George Matz
Lisa Climo & Michael Mungoven	
John & Rika Mouw	



## BEQUESTS

A bequest to the Homer Foundation is simple to include in your will, and we can provide sample language for you and your legal counsel. You can integrate charitable giving into your financial planning by checking with your financial advisor for more information and ideas.

Please consider adding your name to this list of generous visionaries by leaving a legacy to your community through your estate plan and joining the Homer Foundation's Legacy Society. Your gift can be a catalyst for change and an inspiration to others. Contact the Homer Foundation to become a Legacy Society member today.

FINANCIAL SUMMARY

# TREASURER'S REPORT

With the record-setting donations and strong market performance this year, our endowed funds are set up well for the coming decades. The Homer Foundation manages funds with a long-term focus. That is one reason why we have chosen Vanguard as the investment manager as they have a well-respected strategy for long-term investing. Investing for the long-haul means being cautious about taking money out of funds.

For many years now the Homer Foundation has used a conservative calculation to determine the amount available to spend from each fund, that is 4% of the value of the investments averaged over eight quarters.

We hope that market forces continue favorably but we also prepare for the times of downturns, as we look at the investments to serve the community not just for this year and next year but for this decade and following decades.

**Paula Martin**  
TREASURER

**REVENUE AND SUPPORT**

Contributions .....	\$1,824,681
Net Earned Income .....	\$2,580
Investment Gains (Losses) .....	\$786,801
<b>Total Revenue and Support</b>	<b>\$2,614,062</b>

**EXPENSES**

Grants from Participating Funds .....	\$96,577
Grants from Restricted Funds .....	\$166,400
Other Distributions .....	\$30,833
Personnel .....	\$85,098
Operating & Program Expenses .....	\$51,202
<b>Total Expenses</b>	<b>\$430,110</b>

**Total Donated Good and Services**      **\$19,900**

<b>Net Assets as of June 30, 2020</b>	<b>\$2,898,403</b>
<b>Increase/Decrease in Net Assets</b>	<b>\$2,183,952</b>
<b>Net Assets as of June 30, 2021</b>	<b>\$5,082,355</b>

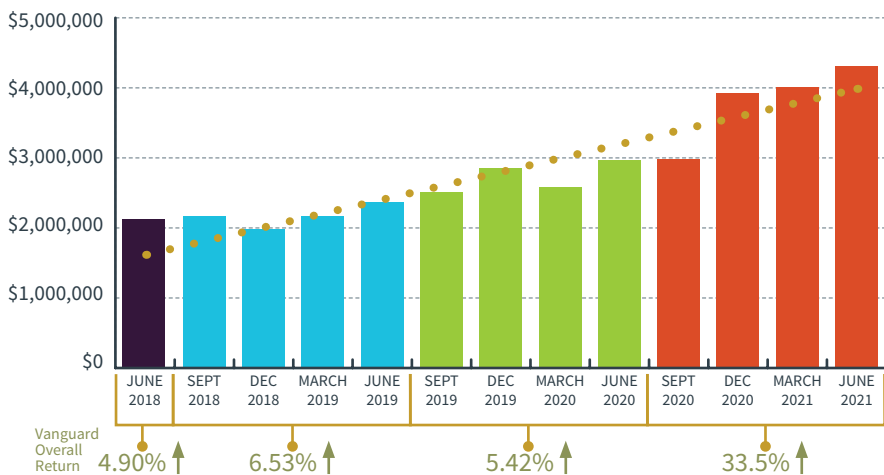
The Homer Foundation's Investments are managed by the Vanguard Group. The investment manager works closely with the Finance Committee, chaired by Paula Martin. The Homer Foundation has a full Financial Review conducted by an outside CPA firm. The Financial Review is available upon request, as is our IRS Form 990. Please note, this is an unaudited financial summary.



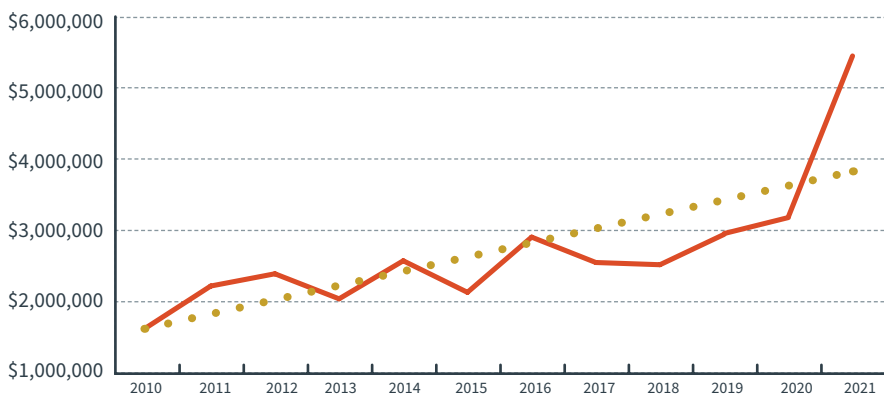


# FINANCIAL IMPACT IN REVIEW

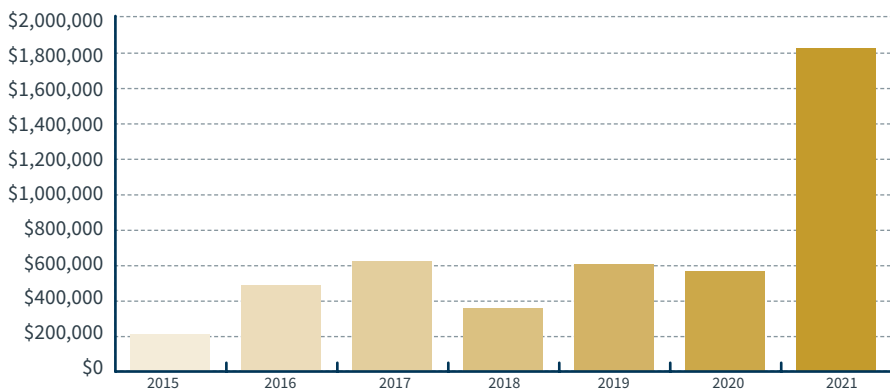
## VANGUARD PERFORMANCE BY QUARTER



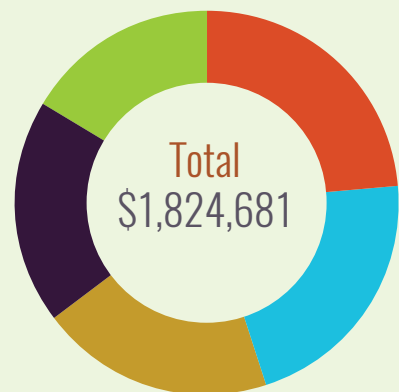
## ASSETS UNDER MANAGEMENT



## CONTRIBUTIONS

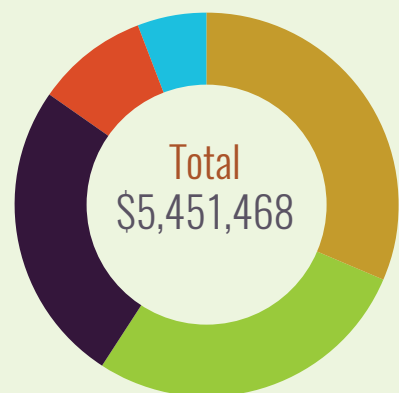


## Contributions By Fund Type



Agency Endowments	\$432,105
Special Projects and Other	\$389,936
Opportunity	\$346,122
Field of Interest	\$296,391
Donor Advised	\$360,127

## Managed Assets By Fund Type



Unrestricted	\$1,399,781
Donor Advised	\$1,711,847
Agency Endowments	\$508,773
Field of Interest	\$1,518,538
Restricted	\$312,539

# FAMILY OF FUNDS

## AGENCY ENDOWMENT FUNDS

Alaska Marine Conservation Council Fund  
 Bunnell Street Arts Center  
 Center for Alaskan Coastal Studies Fund  
 Friends of the Homer Public Library Fund  
 Homer Animal Friends Fund  
 Homer Community Food Pantry Fund  
 Homer Council on the Arts Fund  
 Homer Mariner Fastpitch Softball Fund  
 Kachemak Bay Family Planning Clinic Fund  
 Kachemak Heritage Land Trust Fund  
 KBBJ Public Radio Endowment Fund  
 Peter Larson Compassion in Action Fund  
 Pratt Museum Fund  
 Storyknife Writers Retreat Fund

## DONOR ADVISED

Bryce Golden Fund for Behavioral Health  
 Compass Rose Fund  
 Cottonwood Fund  
 Daisy Lee Bitter Marine & Coastal Education Fund  
 David and Mary Schroer Fund  
 Girl Scouts Travel Fund  
 Gooseberry Fund  
 Homer Incentive Fund  
 Jack and Mary Lentfer Fund  
 Jane Little Family Endowment Fund  
 JEMCO Fund  
 Julie Booth Ulmer Memorial Fund  
 Kathy and Roger Herrnsteen Fund  
 KLEPS Fund  
 May Benson Charitable Fund  
 Tin Roof Fund  
 Willow Fund

## FIELD OF INTEREST

A Music Education Fund  
*In Memory of Renda Horn*  
 Alice Witte Memorial Scholarship Fund  
 Ashley J. Logan Fund  
 Bill & Liz Johnson Teacher Education Scholarship Fund  
 Bluegrass Fund  
 Brother Asaiah Bates Fund  
 Choices for Teens Fund  
 City of Homer Fund  
 Constance M. Benston Fund  
 Diane Wambach “Shoot for the Stars” Scholarship Fund  
 Drew Scalzi Memorial Maritime Scholarship Fund  
 Educator’s Professional Development Fund  
 Fish and Wildlife Scholarship Fund  
 Health Care Providers Scholarship Fund  
 Heather Pancratz Memorial Fund  
 Homer Community Science Scholarship Fund  
 Homer-Kachemak Bay Rotary Club Fund  
 Jessica M. Stevens Memorial Fund  
 Kachemak Bay Medical Clinic Scholarship Fund  
 Kachemak City Fund  
 Kevin Bell & Family Hockey Fund  
 Library Endowment Fund  
 Martha H. Briscoe Fund  
 Mary Joyce Robinette Memorial Scholarship Fund  
 Nikki Geragotelis (Fry) Memorial Scholarship Fund  
 Nursing Studies Scholarship Fund  
 Ptarmigan Arts Scholarship Fund  
 Rotary Club of Homer Downtown Fund  
 Sheldon Youth to Youth Fund  
 Spay & Neuter Fund  
 Sutton James Miller Memorial Scholarship Fund  
 Thor’s Scholarship

## NON ENDOWED FUNDS

Kachemak Nordic Ski Club Stewardship Fund  
 Friends of the Homer Public Library Non Endowed Fund

## UNRESTRICTED FUNDS

Homer Foundation Opportunity Fund
 

- Julia Park Howard Unrestricted Fund
- Steve and Noko Yoshida Fund
- The Jenson Fund

 Homer Foundation Operations Fund  
 Aquila Fund



THANK YOU TO ALL

# COMMITTEE MEMBERS

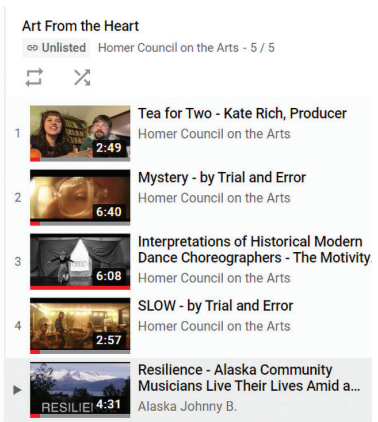
*The Homer Foundation has many different committees to award both grants and scholarships. We want to thank all of our community members who serve on these committees for all of their time, dedication, and thoughtful insights provided for our programs.*

Steve Albert  
 Olga Amaral  
 Esther Ashment  
 Kathie Baldwin  
 Jennifer Bando  
 Emily Berg  
 Michelle Borland  
 Christopher Brown  
 Marie Carlton  
 Melissa Cloud  
 Tom Collopy  
 Cass Crandall  
 Dave Derry  
 Rob Downey  
 Mark Edminster  
 Stan Eller  
 Ginny Espenshade  
 Debbie Fanatia  
 Janet Fink

Jennifer Frazier  
 Bill Fry  
 Dorothy Fry  
 Katie Gavenus  
 Paula Godfrey  
 Judy Gonsalves  
 Shirlie Gribble  
 Lin Hampson  
 Van Hawkins  
 Alyssa Hill  
 Kathy Hill  
 Katie Hollingsworth  
 Cheryl Illg  
 Patti Jay  
 Tom Kizzia  
 Flo Larson  
 Janie Leask  
 Nancy Lord  
 Vicki Lowe

Gary Lyon  
 Christy Martinez  
 Rachel Miller  
 Scott Miller  
 Pat Moss  
 John Mouw  
 Loraine Murphy  
 Jessie Nelson  
 Ginnie Oliver  
 Curt Olson  
 Emilie Otis  
 George Overpeck  
 Matt Pancratz  
 Kalie Petska-Rubalcava  
 Denise Pitzman  
 Lawrence Radcliffe  
 Paul Raymond  
 Sara Reinert  
 Francie Roberts

Stephanie Rodriguez  
 Barb Scalzi  
 Jeff Scarzi  
 Helyn Schoepke  
 Terri Spigelmyer  
 Chris Story  
 Paul Story  
 Carol Swartz  
 Lisa Talbott  
 Kenton Taylor  
 Chris Theno  
 Joanne Thordason  
 Janice Todd  
 Caroline Venuti  
 Claire Waxman  
 Ian Weatherly  
 Jonathan Young  
 Aleda Yourdon



## WHAT HOMER FOUNDATION OFFERS OUR DONORS

The Homer Foundation helps connect your generosity with community needs you care about. Whether you're giving to one of our many established funds or creating a fund to steward what you are passionate about, your gift creates a legacy of impact for generations to come.

### We offer:

- ❖ **FLEXIBILITY AND FOCUS** – You decide how, when and where to concentrate your donation. The Homer Foundation helps you transform your passions into action.
- ❖ **EFFICIENCY & ECONOMY** – Giving through us reduces or eliminates the overhead, time and expense of running a private foundation.
- ❖ **FINANCIAL STEWARDSHIP** – We help you achieve maximum tax advantages and work with your financial advisors and attorneys to incorporate giving into your plans.
- ❖ **SUPPORT AND LEADERSHIP** – Homer Foundation staff and board help identify local needs, so your donations can make the greatest difference.
- ❖ **ANONYMITY** – We honor all requests for privacy and are here to help you reach your philanthropic goals at your own comfort level.
- ❖ Together we are building permanent philanthropic assets for our community.

# 2021 DONORS

## IN KIND

Deborah Speakman  
Denise Pitzman  
Foster & Company  
Ken Castner

## TOWERING SPRUCE [5000+]

Alaska Community Foundation  
Opportunity Fund  
Anonymous  
Homer Community Chest  
Anonymous [2]  
Opportunity Fund  
Anonymous  
The Gooseberry Fund  
Anonymous  
Tin Roof Fund  
Anonymous  
Willow Fund  
Anonymous Bequest  
Opportunity Fund  
Buck & Shelly Laukitis  
Opportunity Fund  
Aquila Fund  
Kachemak Nordic Ski Club  
Agency Stewardship Fund  
Kachemak City Playground  
Repair Fund  
The Compass Rose Fund  
CARES ACT  
Homer Community Chest  
Cathie Ulmer  
Julie Booth Ulmer  
Memorial Fund  
Chuck & Patti Jay  
Educator's Professional  
Development Fund  
Opportunity Fund  
City of Homer  
Opportunity Fund  
City of Kachemak  
Opportunity Fund  
Kachemak City Playground  
Repair Fund  
Corrie Haigh  
Homer Skate Park  
Revitalization  
Dave & Beth Schroer  
Opportunity Fund  
David & Mary Schroer Fund  
Friends of the Homer  
Public Library  
Friends of the Homer Public  
Library Stewardship Fund  
Haas and  
Spigelmyer, Inc.  
Friends of the Homer Public  
Library Endowment Fund  
Opportunity Fund  
KBBI Public Radio  
Endowment Fund  
Library Endowment Fund  
Kachemak Ski Club  
Kachemak Nordic Ski Club  
Agency Stewardship Fund  
Matt & Rebecca Clarke  
Opportunity Fund  
NERG  
Opportunity Fund  
Robert "Gordy" Vernon  
Library Endowment Fund  
The Grog Shop East End  
Kachemak City Playground  
Repair Fund

## STURDY BIRCH [1000-4999]

Angie & Chris Newby  
Pleinmigan Arts  
Scholarship Fund  
Anna Lane, LLC  
Drew Scalzi Memorial  
Maritime Scholarship Fund  
Anonymous  
Homer Skate Park  
Revitalization  
Anonymous [2]  
Sutton James Miller Memorial  
Scholarship Fund  
Anonymous [3]  
Opportunity Fund  
Arlene Ronda  
Kachemak City Playground  
Repair Fund  
Opportunity Fund

Ash & Kristen Churchill  
Opportunity Fund  
Bay Welding  
Kachemak City Playground  
Repair Fund  
Bear Creek Winery  
Kachemak City Playground  
Repair Fund  
Ben Martin  
Homer Skate Park  
Revitalization  
Beryl Air  
Kachemak City Playground  
Repair Fund  
Beverley & Leo Nikora  
Kachemak City Playground  
Repair Fund  
Bill & Dorothy Fry  
The Nikki Geragotelis  
Memorial Fund  
Kachemak City Playground  
Repair Fund  
Homer Mariner Fast Pitch  
Softball Fund  
Bill Bell &  
Mary Lou Kelsey  
Health Care Providers  
Scholarship Fund  
Homer Community Food  
Pantry Fund  
Bill Palmer &  
Shirley Fedora  
Library Endowment Fund  
Homer Foundation COVID-19  
Response Fund  
Brie Drummond and  
Jeff Williams  
Library Endowment Fund  
Catherine & Michael  
McCarthy  
Opportunity Fund  
Cheryl & Mike Illg  
Homer Skate Park  
Revitalization  
Kachemak City Playground  
Repair Fund  
Diane Wambach "Shoot for  
the Stars" Scholarship  
Chris & Pat Moss  
Homer Skate Park  
Revitalization  
Drew Scalzi Memorial  
Maritime Scholarship Fund  
Opportunity Fund  
Cycle Logical LLC  
Homer Skate Park  
Revitalization  
Kachemak City Playground  
Repair Fund  
Dartmouth College  
Health Care Providers  
Scholarship Fund  
Dave Berry  
Library Endowment Fund  
Dave Stutzer  
Opportunity Fund  
Deb Poore &  
Charlie Gibson  
Opportunity Fund  
Denise &  
Gordon Pitzman  
Homer Council on  
the Arts Fund  
Opportunity Fund  
The Nikki Geragotelis  
Memorial Fund  
Edward Jones  
Kachemak City Playground  
Repair Fund  
Elizabeth Cumming  
Opportunity Fund  
Fidelity Charitable  
Gift Fund  
Opportunity Fund  
Flo Larson  
Opportunity Fund  
Homer Kachemak Bay  
Rotary Club  
Opportunity Fund  
Hubert & Janet Gellert  
Kachemak City Playground  
Repair Fund  
Opportunity Fund  
Jedd Finkert  
Kachemak City Playground  
Repair Fund  
Julie & Dave Derry  
Opportunity Fund  
Kachemak Group  
Real Estate  
Opportunity Fund  
Kathy Hill  
Kachemak City Playground  
Repair Fund  
Ken Taylor  
Fish and Wildlife  
Scholarship Fund  
Opportunity Fund

Kenai Peninsula  
Borough School District  
The KLEPS Fund  
Konrad & Gabby Schaad  
Homer Foundation COVID-19  
Response Fund  
Law Offices of  
Lindsay Wolter  
The Nikki Geragotelis  
Memorial Fund  
Library Endowment Fund  
LeAnn Matysczak  
The Nikki Geragotelis  
Memorial Fund  
Linda & Larry Martin  
The Nikki Geragotelis  
Memorial Fund  
Liz & Ron Downing  
Opportunity Fund  
Lori & Tom Zitzmann  
Opportunity Fund  
MarBeth Johns  
Kachemak City Playground  
Repair Fund  
Marcia Kuzsmaul  
Library Endowment Fund  
Mary & Donald Sanders  
Peter Larson Compassion in  
Action Fund  
Friends of the Homer Public  
Library Endowment Fund  
Opportunity Fund  
Sutton James Miller Memorial  
Scholarship Fund  
Mary Frishe &  
Tom Collopy  
The Nikki Geragotelis  
Memorial Fund  
Maxine & Dave Weber  
Opportunity Fund  
Michael Gracz  
Homer Community Chest  
Nancy Kleime  
Homer Skate Park  
Revitalization  
Nancy York  
Kachemak City Playground  
Repair Fund  
Neil Wagner  
Homer Foundation COVID-19  
Response Fund  
Oxana Bykova  
Kachemak Medical Group  
Scholarship Fund  
Paul & Tina Seaton  
Kachemak City Playground  
Repair Fund  
Opportunity Fund  
The KLEPS Fund  
Homer Community Food  
Pantry Fund  
Opportunity Fund  
Paula & Joe Martin  
Opportunity Fund  
Philemon Morris  
Kachemak City Playground  
Repair Fund  
Opportunity Fund  
Rich & Helen Gustafson  
Opportunity Fund  
Scott Meyer  
Opportunity Fund  
South Peninsula  
Hospital Medical Staff  
Health Care Providers  
Scholarship Fund  
Steve & Vicki Albert  
Nursing Studies Scholarship  
Fish and Wildlife  
Scholarship Fund  
Susan Oesting  
The Nikki Geragotelis  
Memorial Fund  
Opportunity Fund  
Kachemak City Playground  
Repair Fund  
The Grog Shop,  
MSA, Inc.  
Opportunity Fund  
Tire Town  
Kachemak City Playground  
Repair Fund  
Todd Family Fund at  
Renaissance Charitable  
Foundation  
Health Care Providers  
Scholarship Fund  
Tom Kizzia  
Opportunity Fund  
Ulmer's Drug & Hardware  
Homer Skate Park  
Revitalization  
Kachemak City Playground  
Repair Fund

## WILD FIREWEED [250-999]

49th State  
Appraisers, LLC  
Opportunity Fund  
Alan Martin  
Opportunity Fund  
Alexandra McGuan  
The Nikki Geragotelis  
Memorial Fund  
Anonymous  
Friends of the Homer Public  
Library Endowment Fund  
Anonymous  
Kachemak Bay Family  
Planning Clinic Fund  
Anonymous  
Library Endowment Fund  
Anonymous [2]  
Opportunity Fund  
Barry Andres &  
Helen Strothers  
Opportunity Fund  
Bill & Roni Overway  
Kachemak City Playground  
Repair Fund  
Bob & Miranda  
Shavelson-Weiss  
Homer Skate Park  
Revitalization  
Opportunity Fund  
Bob Schmutzler &  
Claire Waxman  
The Nikki Geragotelis  
Memorial Fund  
Bonnie Jason &  
David Schneider  
Opportunity Fund  
Brenda & James Dolma  
Opportunity Fund  
Center For Alaskan Coastal  
Studies  
Kachemak Heritage Land  
Trust Fund  
KBBI Public Radio  
Endowment Fund  
Kachemak Bay Family  
Planning Clinic Fund  
Library Endowment Fund  
Brenda Adams  
Opportunity Fund  
Carol Bishop  
Opportunity Fund  
Carol Swartz & Bob Cole  
Aquila Fund  
Christa Collier &  
Charles Ingham  
Kachemak Bay Family  
Planning Clinic Fund  
Opportunity Fund  
Christopher & Linda  
Robinson  
Opportunity Fund  
Coops Coffee  
Kachemak City Playground  
Repair Fund  
Dale Banks  
The Nikki Geragotelis  
Memorial Fund  
Kachemak City Playground  
Repair Fund  
Dana Stabenow  
Opportunity Fund  
David Raskin  
Kachemak City Playground  
Repair Fund  
Deb Leisek & Jim Long  
Opportunity Fund  
Debbie & Jack Oudiz  
Opportunity Fund  
Sutton James Miller Memorial  
Scholarship Fund  
Diane Borgman  
Opportunity Fund  
Dotty Holten  
The Nikki Geragotelis  
Memorial Fund  
Emilie & Edward Otis  
Homer Foundation COVID-19  
Response Fund  
Health Care Providers  
Scholarship Fund  
Emmitt & Mary Trimble  
The Nikki Geragotelis  
Memorial Fund  
Esther & Tabor Ashment  
Kachemak City Playground  
Repair Fund  
The Nikki Geragotelis  
Memorial Fund



TODAY, TOMORROW, FOREVER.

# BUILDING COMMUNITY ASSETS

This year we decided to recognize our generous donors at different giving levels, and we looked about us to find names for the different tiers. Who wouldn't want to be a Sturdy Birch or a Towering Spruce? And no tree gets to be sturdy or towering without starting as an Essential Seedling! Wild Fireweed transform entire hillsides when they bloom in unison, pink and then turn fiery red. It seems that everything around us is growing and the community is growing with new houses appearing seemingly overnight. Our goal is to see the Homer Foundation continue to grow as well.

The Development Committee's job is to look forward to the future. But with our 30th anniversary this year, we took the opportunity to look back and find inspiration for the work ahead. What a sense of reward a person has when they look out at a sapling planted in their yard 30 years ago and see an established tree with substantial roots where birds congregate and squirrels thrive. Our founders and early donors must feel the same sense of satisfaction today.

With this in mind, our goal for supporting the area's nonprofits is to have a corpus of \$20 million by 2028. This may seem overwhelming until we look back five years ago

to our 25th anniversary and see that our corpus has nearly doubled since then — from \$2.8 million to \$5.2 million. This committee recently created a five-year development plan with a focus on marketing, individual giving, corporate giving, and legacy bequests to help us achieve our goal. Are you interested in supporting the arts? We have a fund for that! Want to support youth in perpetuity? You can create a fund for that! Whatever your passion, we have a way for you to support it. Plant your Essential Seedling and watch it grow into a Towering Spruce!

**Denise Pitzman,**  
Development Chair

## IRA CHARITABLE ROLLOVER GIFTS


*If you are 70½ years old or older, you can take advantage of a simple way to help charities like the Homer Foundation and receive tax benefits in return. You can give up to \$100,000 from your IRA directly to a charity, without having to pay income taxes on the contribution. This can be accomplished with an IRA Charitable Rollover gift.*


<p><b>AT SOME POINT, YOU HAVE TO WITHDRAW MONEY FROM YOUR IRA.</b></p>	<p><b>WHAT IS AN IRA CHARITABLE ROLLOVER GIFT?</b></p>	<p><b>THE BENEFITS OF AN IRA CHARITABLE ROLLOVER GIFT.</b></p>	<p><b>HOW DO YOU MAKE AN IRA CHARITABLE ROLLOVER GIFT?</b></p>
<p>Beginning at 70 ½, you may take a required minimum distribution (RMD) each year from your IRA, and the RMD amount increases with age. This becomes a mandatory distribution once you are 72. You are taxed on the RMD at ordinary income tax rates, as opposed to lower capital gains tax rates. And if you do not take your full RMD, you may be subject to tax penalty.</p>	<p>An IRA Charitable Rollover gift is a distribution from your IRA that is paid directly to a charity of your choice. You cannot claim an itemized charitable deduction for this gift, but it is not included in your income and you pay no income taxes on it.</p>	<p>An IRA Charitable Rollover gift offers several benefits because the contribution from your mandatory distribution reduces your taxable income. This is especially relevant beginning this year, since the standard deductions have been increased, making itemized deductions less appealing.</p>	<p>The process is simple. All you need to do is instruct your IRA custodian to make a distribution from your IRA directly to the charity or charities of your choosing. Your IRA custodian should include your name and address, as well as any specific instructions you have for the use of the gift, along with the payment.</p>


Community Foundations provide the ability for individuals to come together and build permanent philanthropic assets for their community. We can use these assets to enhance the quality of life and provide critical services close to home. The Homer Foundation provides a trustworthy and highly personal approach to giving. You are the most important part of this process.


## WAYS OF GIVING


Our donors have found many creative ways to make a tax-deductible donation to support their community. Here are just a few!

 Add the Homer Foundation to your estate planning

 Donate your time through joining one of our committees


 Make the Homer Foundation a beneficiary of a retirement account or a life insurance policy

 Choose the Homer Foundation through PICK, CLICK.GIVE., the PFD Charitable Check-off

 Donate cash, stocks and securities

 Donate through corporate employee matching funds

 **amazon smile**  
You shop. Amazon gives.

 Donate a property such as a home, car, art work, etc.

Choose the Homer Foundation when shopping online at Amazon Smile

## GIFTS AT A GLANCE

TOTAL GIFTS

**\$1.8 MILLION**

INCREASE OF \$1.2 MILLION FROM 2020

LARGEST GIFT

**\$828,216**

MOST POPULAR METHOD

**CASH** 

### MAKE A GIFT

To make a gift to the Homer Foundation, you may need the following information:

**OUR EIN:** 92-0139183

**OUR PHYSICAL ADDRESS:**  
3733 BEN WALTERS LANE,  
SUITE 7,  
HOMER, AK 99603

Contact the staff at the Homer Foundation with any other questions. We are happy to help you.

2021

# HALIBUT COVE LIVE



If you've ever had the pleasure of attending Halibut Cove Live, you understand why it has been such a great fundraising event for the Homer Foundation. As you sit on the deck listening to live music float up from the water, eat outstanding food, and watch the sea otters paddle by, you can agree with the ticket-holder who declared, "We are the luckiest people in the world!"

We unfortunately needed to cancel this summer's events again due to the COVID-19 pandemic. However, our hosts, Pauli and Harmon Hall of Quiet Place Lodge, and staff are already planning next year's events. We want to ensure we maintain the special experience of these events, and are creatively brainstorming ways to make another memorable Halibut Cove weekend happen in our ever-evolving world.

Halibut Cove Live continues to be our most important fundraiser and outreach activity. We look forward to presenting the 10th year of this unique event next summer. Be sure to check [halibutcovelive.com](http://halibutcovelive.com) for further details. We look forward to dancing with you in Halibut Cove again soon!





PO Box 2600  
Homer, AK 99603

Nonprofit  
Organization  
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Homer AK  
Permit #15

Or Current Resident

## WAYS TO GIVE TO THE COMMUNITY FOUNDATION


**Leave a Legacy:** Leaving a gift to your community in your estate planning is a wonderful way to give back and ensure that your charitable vision endures forever.

**Contribute to a Fund:** Anyone can be a donor and we welcome gifts of any amount. When you contribute to an existing fund such as our Opportunity Fund, your gift will be used to support building a stronger, more vibrant community.

**Establish a Fund:** Establishing your own named fund is a great way to support your passions, receive an immediate tax benefit, and recommend grants to nonprofits doing the work you care about. We can structure your fund to meet your philanthropic goals.

## CONNECT WITH US

 907.235.0541

 3733 Ben Walters Lane  
Suite 7, Homer, AK  
*lower level of the  
Kachemak Bay Title Building*

 [info@homerfoundation.org](mailto:info@homerfoundation.org)

 [www.homerfoundation.org](http://www.homerfoundation.org)

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