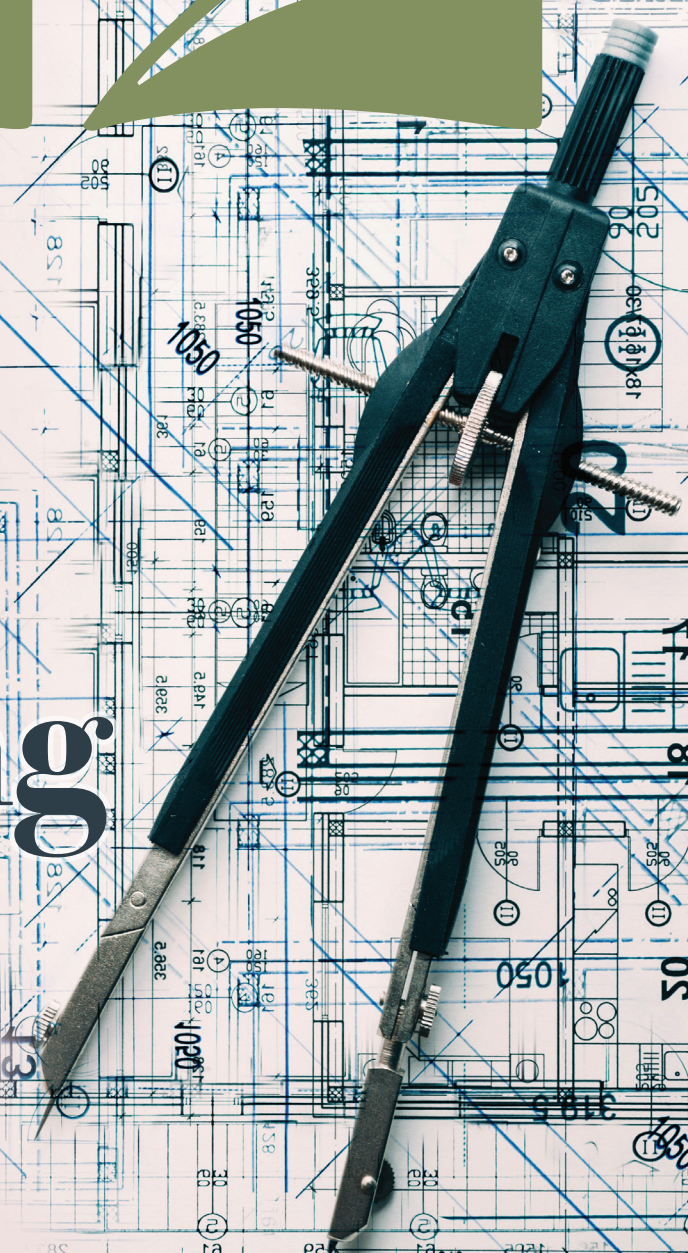




Strong, Stable, Enduring



The **HOMER**
FOUNDATION

ANNUAL REPORT 2022

The HOMER FOUNDATION

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.

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Our Communities had a Great Year in 2022

HOMER FOUNDATION STAFF



Mike Miller
Executive Director



Lauren Seaton
Executive Assistant



Julia Clymer
Accountant

Businesses were open and profitable. Cities made major infrastructure investments. Nonprofits promoted the arts, held youth activities and the hungry were fed, just to mention a few.

The Homer Foundation also had a great year. We started more new funds (nine) than we ever have in a single year. We gave away more in scholarships than we ever have before (\$44,000) and gave out \$509,697 in grants and fiscal sponsorships to 39 nonprofits and two municipalities.

Through most of this time inflation was up and the market was down. The southern Kenai Peninsula, and the whole country, have been experiencing trying and unusual economic times. How should we react? Warren Buffett once said, "I would tell [investors], don't watch the market closely," during a period of wild market fluctuations.

He added that investors who buy "good companies" over time will see results 10, 20 and 30 years down the road. We think that is an excellent strategy for community foundations too.

The Homer Foundation takes a long approach to investments. We invest our

finances in a professionally managed portfolio at Vanguard Institutional Investments. As it says in part of our core values:

*We strive to endure
for generations
to come within a
vibrant community.*

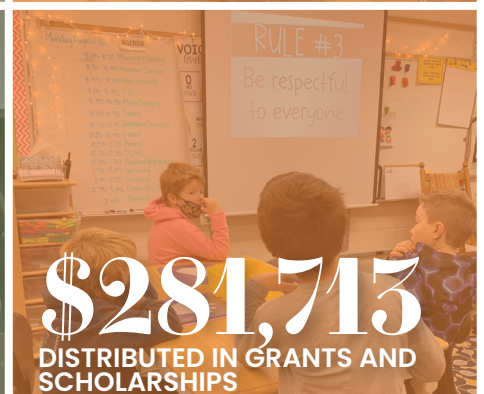
Our Board of Trustees takes the long view, and as a result we are strong, stable, and managing these funds for the long term. Through ups and downs we remain constant. We continue to assist our non-profit partners in the vital work they do in our communities. We are honored to work with our donors to help them make a difference in the areas they are passionate about. Together we continue providing support for the vibrant communities that we call home.

Van Hawkins
Board President

Mike Miller
Executive Director

Our mission is to enhance the quality of life for the citizens of the greater Homer area by promoting philanthropic and charitable activities.

A Year in Review



Board of Trustees

I find myself looking forward to our meetings because this Homer Foundation Board of Trustees is so energizing. They come from different backgrounds, each with special knowledge and experiences, but all bound together by a shared dedication to philanthropy.

And we have fun! There's a little magic in having a board that genuinely likes to hang out with each other.

Denise Pitzman
Vice President



Dave Derry
Trustee



Liz Downing
Development
Committee Chair



Van Hawkins
President



Paula Martin
Treasurer



Denise Pitzman
Vice President



Lawrence Radcliffe
Trustee



Sara Reinert
Trustee



Paul Seaton
Community Grants
Committee Chair



Terri Spigelmyer
Board President



Ken Taylor
Trustee



Chris Theno
Trustee



SARA REINERT

Sara joined the board in 2022, after serving for years on various scholarship committees with the Homer Foundation. She is a retired educator from Kachemak Bay Campus of University of Alaska Anchorage where she taught math and statistics. She has been in Homer since 1986, when she worked with Alice Witte as a volleyball coach with the intent to stay for 6 months. She is a tireless volunteer with many local organizations, and we are looking forward to learning more of her Homer Knowledge. Sara reflects that it is always a privilege to be given the opportunity to serve one's community in a meaningful way. Here, here!

LAWRENCE RADCLIFFE

Lawrence joined the board in 2022, although he has been on our Community Grants Committee since 2019. He purchased land in Homer in 1983 but did not permanently move here until 2005. He has extensive work experience with construction and the oil industry but has been retired since 2015. He is most passionate about outdoor education, recreation, and the community, volunteering with both SPARC and the Boy Scouts. When asked about why he is a board member for the Homer Foundation, Lawrence states,

"We live in a wonderful community and this is a way I can add sustained value. I recognized in my teens that volunteers and non-profit organizations of many types positively impacted my life and community. Upon retiring, I sought our volunteer opportunities with my extra time."

With a little help from our friends

Well, a lot of help actually. In February 2022, we were notified that the MJ Murdock Charitable Trust awarded the Homer Foundation a three-year capacity-building grant to hire a Director of Development and Marketing.



Amongst other experiences, Jonathan was Director of Corporate Sales and Marketing at Michigan Technological University, an admission counselor at Northern Michigan University, and Public Affairs Coordinator for the Fairbanks Chamber of Commerce from where he originally hails. Jonathan has earned both a Masters of Divinity and a Masters of Business Administration. Jonathan can be reached at jhamilton@homerfoundation.org or 907-235-0561.

This additional capacity makes it possible to reach out further and more thoroughly into our entire service area. We are so pleased and grateful to the folks at MJ Murdock who saw in us the ability to continue to grow and serve this region as the choice for local long-term philanthropic solutions.

The Board of Directors considered this grant for several years but waited for significant milestones to be met, which had been our focus prior to this grant. It had become clear that the breadth and depth of our development work have grown beyond the capacity of our volunteer board, active development committee, and current staff. The additional capacity provided by this position will allow us to consistently and effectively reach new communities and develop the relationships that are so important in long-term philanthropy.

After an exhaustive search we added Jonathan Hamilton to the Foundation team.

Thank you MJ Murdock Charitable Trust for investing in the southern Kenai Peninsula.

Development Committee Update

Recently, I sat on my neighbor's deck in one of those wonderful gatherings that start with a quick hello and end hours later. We shared our stories of family, our years in Alaska, and our love of travel. But over and over again, the refrain from each of us was, "Aren't we so lucky to live in this beautiful place?" and "What a great community we've had to raise our kids." Our conversations were on the past but also the future. "What will be our legacy for our families, neighbors, and this beautiful place?"

As the Development Committee wraps up another year, we celebrate your generosity and the strength of our relationships throughout the communities we serve. We are moving steadily toward our overarching goal of a \$20 million corpus when your gifts will result in well over half a million dollars annually granted for worthy projects to enhance and strengthen our lives. A big step forward has been the award of the MJ Murdock Charitable Trust grant that has brought us our new development/marketing director, Jonathan Hamilton. We look forward to collaborating with you to make your donations serve your goals.

Liz Downing
Development Committee Chair

While our committee, board, and staff are hard at work to make your legacy endure, may I ask a favor?

PLEASE:

DONATE today and consider making it a monthly donation.

Increase your **ANNUAL GIFT**.

DONATE AS A BUSINESS PARTNER or ask your employer to partner with us.

Name the **HOMER FOUNDATION AS A BENEFICIARY** in your life insurance or will.

TELL YOUR FRIENDS why you give and encourage them to do the same.

VOLUNTEER to help with our events and committees or ask about an opening on our Board.

Why we donate to the Homer Foundation

We are strong believers in supporting the community in which we live.

Though we still donate individually to our favorite non-profits, we feel that the Homer Foundation has a stronger knowledge of what our community needs are, makes good decisions on allocating funds and can serve the Homer area community in a broader way than we can as individuals.

When we lived in Anchorage, Bill pledged funds to United Way annually through ARCO and BP. I had coordinated an annual campaign with all the government agencies

where we raised \$400K for United Way. Bill was a Cub Master for Scouts and I ushered for the performing arts. We had thought our donations supported the non-profits we believed in.

Coming to Homer 25+ years ago, we transferred our volunteer efforts to Cub Scouts 555, Pier One, Center for Alaska Coastal Studies, community schools, etc. When I became involved with Homer Community Food Pantry, I felt that it served the most community need, yet “staff” was all volunteers with no/little time resources for obtaining funding.

The Homer Foundation is our true United Way!



Shirley Fedora and Bill Palmer

Celebrating generosity. Securing the community's future

The Homer Foundation is proudly growing our Legacy Society. We recognize the following individuals as Legacy Society members, and thank them for their vision and generosity.

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 also integrate charitable giving into your financial planning by contacting your financial advisor for information and ideas. If you have arranged for a future gift to the community through the Homer Foundation we would like to include you as a Legacy Society member too!

Please consider adding your name to this list of generous visionaries by leaving a legacy to your community through your estate plan. By 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.



Anonymous

Martha Briscoe

Richard & Marylou Burton

Ken Castner & Nancy Lord

Lisa Climo &
Michael Mungoven

Christa Collier

The Clyfus Family

Donna Rae Faulkner
& Don McNamara

Will Files &
Marthaellen Anderson

Kim Fine & Max Mitchell

Janet Fink

Bill & Dorothy Fry

Kathy & Roger Herrnsteen

Kathy Hill

Jim Hornaday

Tom Kizzia

Janet M. Knutson &
Edward W. Hutchinson

Flo Larson

Jim & Ruth Lavrakas

Jack Lentfer

Jo & Peter Michalski

Philemon Morris

John & Rika Mouw

John Munns

Daniel Perry

Denise & Gordon Pitzman

Peggy Price & Kathy Franz

Robert & Melon Purcell

Joyce Robinette

Paul & Tina Seaton

Rand & Lauren Seaton

Terri Spigelmyer

Joy Steward &
Stuart Schmutzler

Jenny Stroyeck &
Michael Armstrong

Ken & Chow Taylor

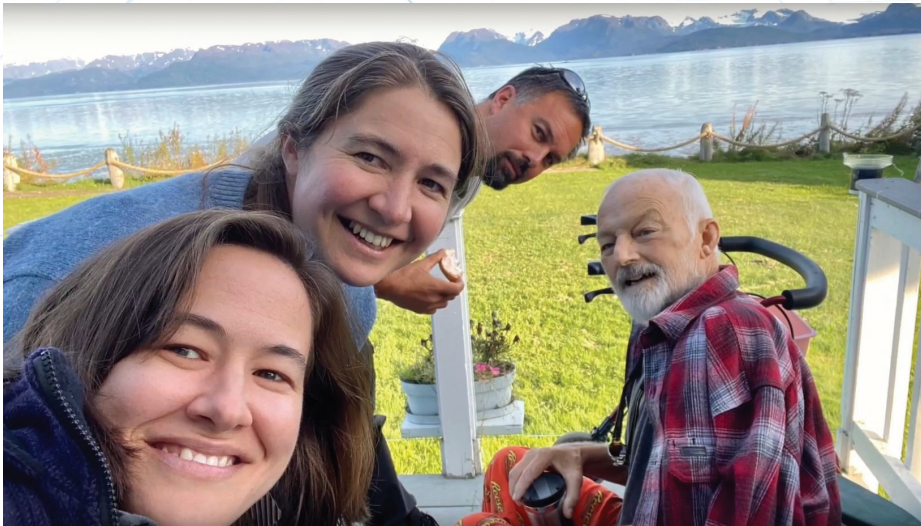
Kathryn Thompson

Cathie Ulmer

Randy Wiest

Jeannie Woodring &
George Matz

New Funds



HOSPICE OF HOMER NON-ENDOWED STEWARDSHIP FUND

“Have you ever had a wild bird crash into a window, stunned and disoriented? That’s what he was like then. Watching my father crash land and figure out how to love and support him from that time until his death over two years later - that was hard. Any of you who have attempted to hold a wild injured bird and care for it will understand he was broken so he needed help and support or he would have suffered further injury. But because he was so accustomed to strength and independence my caring could very quickly feel like a cage to him. There was no way to make that period easy, but Hospice of Homer eased our way.”

LAURA BRANDT, after the passing of her father Hal Brandt

Both the Peter Larson Compassion In Action Endowed Fund and the Hospice of Homer Non-Endowed Agency Stewardship Fund help fulfill our mission to serve the southern Kenai Peninsula by providing comfort, dignity, and choice through care, support and education to the frail and isolated and to those facing end-of-life issues. The engagement and support of donors and other local agencies like the Homer Foundation encourage us to grow our services in ways that better fill the community’s needs.

HOMER COMMUNITY FOOD PANTRY SUSTAINABILITY AGENCY STEWARDSHIP FUND

The Homer Food Pantry provides food and emergency services, with compassion, to those seeking our services. All the hard-working volunteers that make our local pantry function and, I’m sure, all our generous donors that understand the need in our community would love for our services to no longer be needed. How great would it be if food and housing insecurity were no longer prevalent for anyone in our community? The reality is our food pantry has seen steady growth in those seeking our services through the years. The unpredictability of things over the last several years has made it clear that the food pantry would greatly benefit by having a more stable financial foundation to help plan for the fluctuations in client needs, supply chain constraints, grant opportunities, and yearly donations. With this goal of financial stability and a serendipitous grant, our food pantry hopes to grow a sustainable fund to help us plan and provide for the future.

SOUTH PENINSULA HOSPITAL FOUNDATION NON-ENDOWED FUND

Earlier this year, the South Peninsula Hospital Foundation proudly started their own Non-Endowed Donor Advised Fund with the goal of empowering community health. The South Peninsula Hospital Foundation is a fundraising institution dedicated to the benefit of and welfare of the people of the southern Kenai Peninsula and committed to tackling the barriers of community health. The SPHF is delighted to build on a long history of collaborative solutions to help support our community’s growth. They are a non-profit charitable organization and a foundation in community well-being.





ANCHOR POINT FUND

The Anchor Point Fund was started as a field of interest fund this year by a family in our community to provide funding supporting non-profits serving the Anchor Point Community. It was started as an acorn fund, meaning they are actively fund-raising for two years to meet our minimum fund requirement of \$10,000. They successfully held the second annual Concert on the Green this summer to benefit this fund. If you are interested in supporting this fund, donate today.

JAMES FAMILY FUND

The James Family Fund was started as a donor advised fund this year from a donor family in our community to provide funding to the food pantry and or other activities that increase the capacity of the community to feed itself (i.e. agricultural projects); Haven House for the support of victims of violence; Homer Public Library for special projects; disaster relief; and special needs activities with a focus on autism.

HOMER ROPE TOW NON-ENDOWED STEWARDSHIP FUND

The Homer Rope Tow Stewardship Fund was started as a Non-Endowed Agency Stewardship Fund to benefit the Homer Rope Tow, the town's alpine ski hill, owned and operated by the all-volunteer Kachemak Ski Club. KSC's mission as a non-profit is to provide instruction, promote interest and safe participation in snowboarding and alpine skiing at Homer Rope Tow. The Stewardship Fund was formed to secure the Rope Tow's fiscal viability and to provide funds for future improvement and expansion of alpine skiing opportunities for Homer and Kenai Peninsula snow sports enthusiasts at the Rope Tow.

FRIENDS OF KACHEMAK BAY STATE PARKS

The Friends of Kachemak Bay State Parks Fund was started as a Non-Endowed Agency Stewardship Fund to promote the enhancement, preservation, and protection of the natural recreational, scientific, and historical resources of Kachemak Bay State Park. This is another all-volunteer organization in our service area that is looking for more flexible investment funds to further enhance its mission.



NEW FUNDS

GARY THOMAS MEMORIAL FUND

The Gary Thomas Memorial Fund exists to keep Gary's love for our local communities alive. Gary's widow, Laura Patty, notes that,

"The fund was established to honor Gary's legacy of contributing to the Homer community."

The Fund will support all aspects of community development work going on in the Foundation's service area. As it contributes to the betterment of the community, it will perpetuate Gary's legacy of giving for years to come. The Fund is a fitting way to preserve Gary's memory in the local community, and his impact upon it.

PIER ONE THEATRE GARY THOMAS LIVE LARGE AGENCY ENDOWMENT FUND

"In early 2022, a Tennessee boiler system company reached a settlement with Laura Patty, the widow of Gary Thomas, a longtime Homer resident and volunteer killed on Jan. 14, 2022, when a Lochinvar boiler exploded at a house Thomas had been checking on for a friend who lived out of town. Patty filed a wrongful death lawsuit on her behalf and that of their children, Mica Thomas, Mariah Greenwald and Jenny Doherty. As part of the settlement, the Thomas family received an undisclosed amount of money. The family decided to give the money to several area nonprofits to use as they deemed appropriate."

MICHAEL ARMSTRONG for the Homer News

We received a call from Laura soon after the settlement was reached to let us know that the family had chosen to make a donation of \$10,000 to Pier One Theatre. For the last several years, the Pier One Board of Directors had been discussing the need to establish and grow an endowment fund at the Homer Foundation, but was unable to free up the start-up funds from general operating expenses. The unexpected \$10,000 donation was the perfect amount to establish the fund. During discussion with Laura, we determined it felt good and right to use these funds to establish the Pier One Theatre Gary Thomas "Live Large" Fund at the Homer Foundation.

Among his many other pursuits, Gary was a long-time participant at Pier One Theatre, on stage and off. He was a delightful performer, leant his auctioneering skills to every end-of-season party, volunteered his time as an usher, or carpenter, or wherever was needed, and supported his children in their own theatre pursuits. We are grateful to Gary's family, and are honored to establish this fund in his name and in his spirit."



Kachemak City Playground

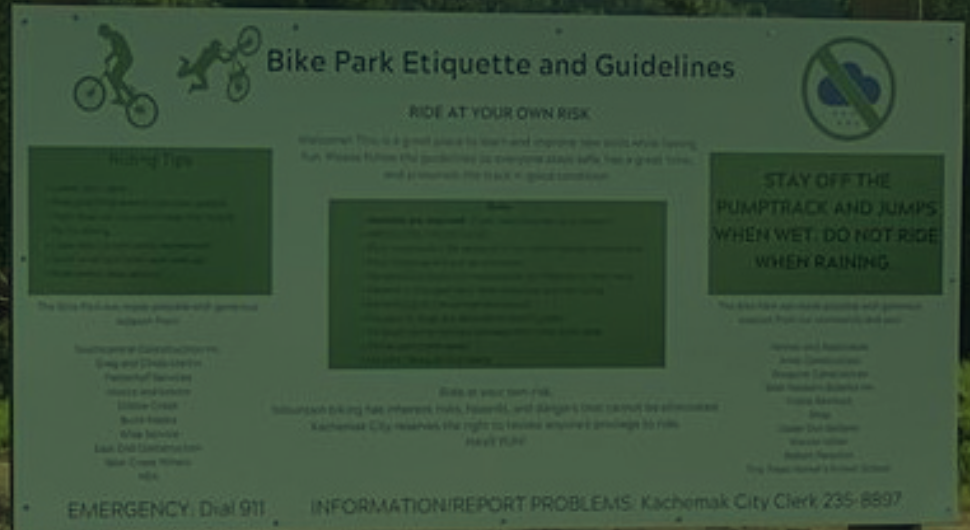
At the beginning of this project I just wanted to repair our tennis court that I drove by every day. Weeds were growing up through cracks in the asphalt and the fence was falling over.

As a Council Member I couldn't ignore this situation. I began the process of raising funds to replace the tennis court and maybe add a couple basketball hoops. I petitioned the Council for a startup contribution (45K) and laid out a financing strategy to raise the estimated cost to replace the court (\$150K).

We formed a Park Committee comprised of past and present Council Members: Connie Isenhour, Chris Perk and Jeannie Walker. Together we modified the financing strategy somewhat and not only were we successful, but wildly successful. Along with the many In-Kind donations we received, we more than doubled our budget! That allowed us the flexibility to expand the scope of the project to include a Bike Park, Soccer field, Sledding Hill and a Brand-New Playground.

The great part of this story is the donations that were entrusted to us by our supporters. Yes, we did a lot of legwork but without everyone's generous donations, this terrific result simply would not have happened. I am very grateful. Thank you, Homer Foundation for being one of our biggest supporters.

Bill Fry



Community Grants

The Community Grants were greatly increased this year, mostly due to our fiscal sponsorship projects with Kachemak City Playground and the Friends of the Homer Skatepark. Additionally, many area nonprofits are navigating new projects or re-vamping current programs and operations while remaining safe with continued COVID-19 risks, and we are proud to support these through our grants. If you are interested in helping make a difference within our communities, we are looking to add new volunteer members to our Community Grants Committee, contact staff for more information.

Paul Seaton

Grants Committee Chair

CONSERVATION & ENVIRONMENT \$48,439

MARTHA H. BRISCOE ENVIRONMENTAL SCIENCE & CONSERVATION FUND & OPPORTUNITY FUND

Kachemak Heritage Land Trust \$4,000
Strategically Decreasing
Organizational Stressors

OPPORTUNITY FUND

The Conservation Fund \$20,000
Saddle Trail Property Acquisition
Ground Truth Trekking \$5,000
Tutka Backdoor Sustainability

OPPORTUNITY GRANTS RESERVE

Friends of Kachemak Bay State Park \$3,699
Walk Behind Mower
Kachemak Heritage Land Trust \$3,740
Caring for Land

WILLOW FUND, KLEPS FUND & DAISY LEE BITTER MARINE & COASTAL EDUCATION FUND

Kachemak Bay Conservation Society .. \$12,000
Homer Drawdown: Peatlands Part 2

GENERAL OPERATING SUPPORT \$48,043

ALASKA MARINE CONSERVATION COUNCIL AGENCY ENDOWMENT FUND

Alaska Marine Conservation Council \$252
Agency Endowment Distributions

BUNNELL STREET ARTS CENTER AGENCY ENDOWMENT FUND

Bunnell Street Arts Center \$287
Agency Endowment Distributions

CENTER FOR ALASKAN COASTAL STUDIES AGENCY ENDOWMENT FUND

Center for Alaskan Coastal Studies \$1,919
Agency Endowment Distributions

CITY PASS THROUGH FUND

Bunnell Street Arts Center \$1,500
Center for Alaskan Coastal Studies \$2,733
Cook InletKeeper \$1,500

General Operating Support continued

Homer Community
Food Pantry \$2,733
Homer Council on the Arts \$2,733
Homer Farmers Market \$3,233
Homer Hockey Association .. \$1,500
Hospice of Homer \$3,233
Kachemak Bay
Family Planning Clinic \$2,003
Kachemak Heritage
Land Trust \$1,500
Kachemak Nordic
Ski Club \$2,000
KBBI \$3,233
OPUS \$1,500
SPROUT \$2,000

DAVID & MARY SCHROER FUND

KBBI \$3,000
General Operating Support

FRIENDS OF THE HOMER PUBLIC LIBRARY AGENCY ENDOWMENT FUND

Friends of the Homer
Public Library \$2,641
Agency Endowment Distributions

HOMER ANIMAL FRIENDS AGENCY ENDOWMENT FUND

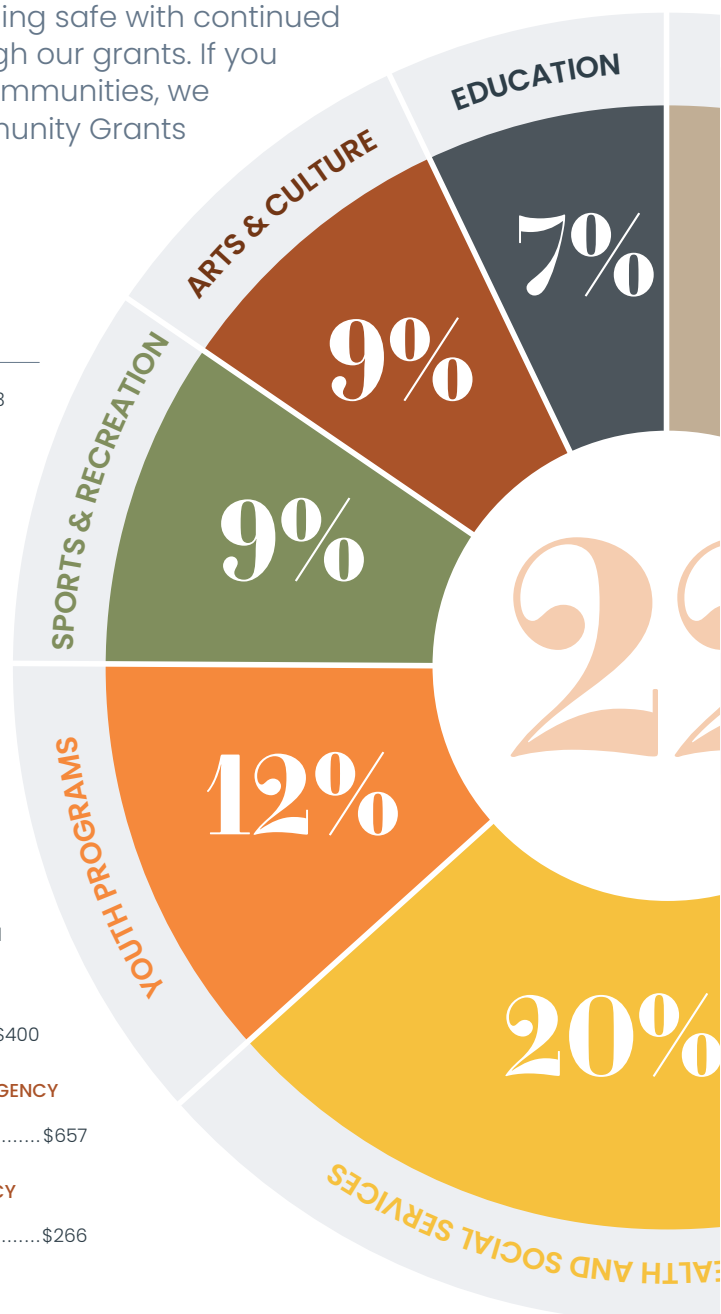
Homer Animal Friends \$400
Agency Endowment Distributions

HOMER COMMUNITY FOOD PANTRY AGENCY ENDOWMENT FUND

Homer Community Food Pantry \$657
Agency Endowment Distributions

HOMER COUNCIL ON THE ARTS AGENCY ENDOWMENT FUND

Homer Council on the Arts \$266
Agency Endowment Distributions



*General Operating Support continued***HOMER MARINER SOFTBALL AGENCY
ENDOWMENT FUND**

Homer Mariner Softball..... \$596
Agency Endowment Distributions

**KACHEMAK BAY FAMILY PLANNING CLINIC
AGENCY ENDOWMENT FUND**

Kachemak Bay Family Planning Clinic..... \$410
Agency Endowment Distributions

**KACHEMAK HERITAGE LAND TRUST AGENCY
ENDOWMENT FUND**

Kachemak Heritage Land Trust \$843
Agency Endowment Distributions

**KBBI PUBLIC RADIO AGENCY
ENDOWMENT FUND**

KBBI Public Radio..... \$1,060
Agency Endowment
Distributions

CONSERVATION & ENVIRONMENT
22%

*General Operating Support continued***OPPORTUNITY FUND**

Educators Professional
Development Fund..... \$500
People's Choice Awards
Hospice of Homer..... \$500
People's Choice Awards
Kachemak Swim Club..... \$500
People's Choice Awards

**PETER LARSON COMPASSION IN ACTION AGENCY
ENDOWMENT FUND**

Hospice of Homer..... \$1,176
Agency Endowment Distributions

PRATT MUSEUM AGENCY ENDOWMENT FUND

Pratt Museum..... \$850
Agency Endowment Distributions

**STORYKNIFE WRITERS RETREAT AGENCY
ENDOWMENT FUND**

Storyknife Writers Retreat..... \$785
Agency Endowment Distributions

HEALTH AND SOCIAL SERVICES \$46,085**COMMUNITY CHEST FUND**

Homer Community Food Pantry..... \$41,585
Emergency Non-Food Aide

COTTONWOOD FUND

Homer Senior Citizens, Inc \$1,000
New Fire System

DAVID & MARY SCHROER FUND

Homer Community Food Pantry..... \$1,000
Funding for Food

OPPORTUNITY FUND & BLUEGRASS FUND

Saturday Lunch Program..... \$2,000
Shelving for food organization

OPPORTUNITY GRANTS RESERVE

Anchor Point Food Pantry..... \$500
Employee Matching Grant

YOUTH PROGRAMS \$26,360**CONSTANCE M. BENSTON FUND,
HORN SECTION FUND, JEMCO FUND, KLEPS
FUND, MAY M. BENSON CHARITABLE FUND,
& OPPORTUNITY FUND**

OPUS \$7,500
Year 2- Full time position

DAVID & MARY SCHROER FUND

Homer Foundation Youth
Advisory Committee..... \$1,000
Youth Grant Program

KLEPS FUND

SPROUT..... \$1,000
Homer Imagination Library

OPPORTUNITY FUND

Emblem Club..... \$500
AK to DC 2022
Friends of the Homer Public Library \$4,820
Summer @HPL 2022
Kachemak Bay Running Club..... \$1,540
Kachemak Bay Running Club Youth Program

YAC FUND

Bunnell Street Arts Center..... \$500
Homer Council on the Arts \$2,000
Kachemak Bay Family Planning Clinic.... \$2,000

Youth Programs continued

Kachemak Bay Running Club \$1,500
Kachemak Nordic Ski Club..... \$1,000
Ninilchik Saturday Lunch Program..... \$1,500
South Peninsula Behavioral Health..... \$1,500

SPORTS & RECREATION \$21,372**COMPASS ROSE FUND, KEVIN BELL & FAMILY
HOCKEY FUND & KLEPS FUND**

Homer Hockey Association..... \$4,072
Communications Director

DAVID & MARY SCHROER FUND

Homer High School Booster Club \$1,000
Team Travel
Homer Mariner Softball..... \$500
Moving into Virtual Reality

GOOSEBERRY FUND

Kachemak Ski Club..... \$1,000
World Telemark Day

HOMER KACHEMAK BAY ROTARY CLUB FUND

Homer Kachemak Bay Rotary Club \$1,300
Homer Skatepark Revitalization Project

KLEPS FUND

Homer Mariner Softball..... \$1,000
Travel

OPPORTUNITY FUND

Anchor Kings Wrestling..... \$5,000
Club Expansion
Kachemak Bay Running Club \$2,500
Steens Running Camp
Kachemak Swim Club \$5,000
New Timing System

ARTS & CULTURE \$19,600**COTTONWOOD FUND**

Pratt Museum \$1,300
Nutcracker Exhibit

OPPORTUNITY FUND

Storyknife Writers Retreat..... \$3,300
Security System for Storyknife

OPPORTUNITY FUND & WILLOW FUND

Homer Council on the Arts \$5,000
Homer Ceramic Studio
Pratt Museum \$5,000
Ron Senungetuk Retrospective

WILLOW FUND

Bunnell Street Arts Center..... \$5,000
Bunnell Arts by Air

EDUCATION \$15,000**DAVID & MARY SCHROER FUND**

Homer High School..... \$3,000
Homer High School Positive Behavior Supports
Homer Middle School \$3,000
Wrestling Gear
McNeil Canyon Elementary \$3,000
Student Enrichment Opportunities
Paul Banks Elementary \$3,000
Library Updates
West Homer Elementary..... \$3,000
Poster Maker Equipment Upgrade

Reasons to Partner with the Homer Foundation:

Grant Impact

Donors give many reasons they like to partner with us—here are a few:

LOCAL EXPERTISE:

With deep roots in our community, we have a broad understanding of local needs and are able to identify opportunities to invest in innovative solutions that create lasting change.

TRUST & ACCOUNTABILITY:

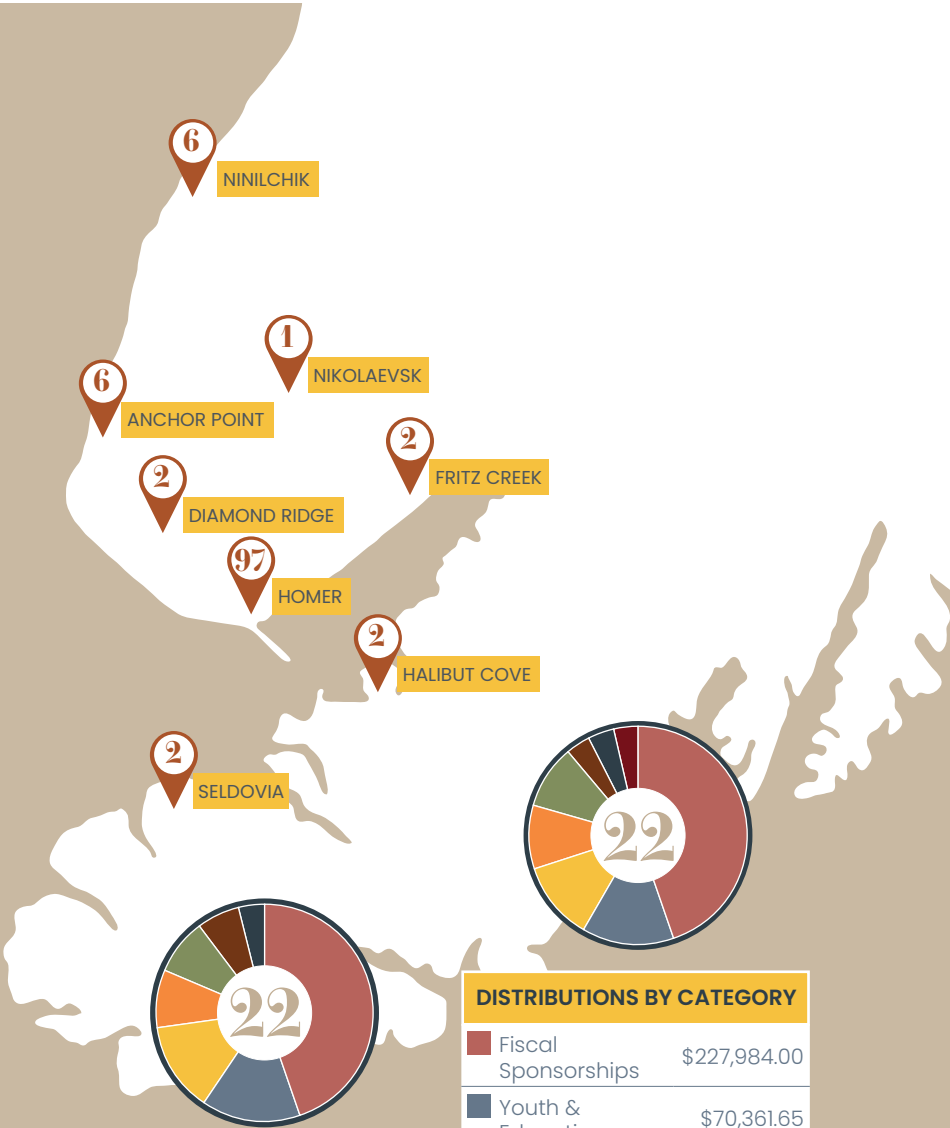
We provide wise stewardship of the gifts entrusted to us in two ways: 1) through professional investment management, and 2) in the strategic grants we make for the southern Kenai Peninsula. The Homer Foundation is accountable to our donors, our Board, and our community, and constantly strives to create real, measurable impact.

HIGHLY PERSONALIZED AND FLEXIBLE SERVICE:

The Homer Foundation is exceptionally flexible and adaptable. We are available to help guide donors in formulating and fulfilling their philanthropic goals. We accept a wide variety of assets, even the most complex forms.

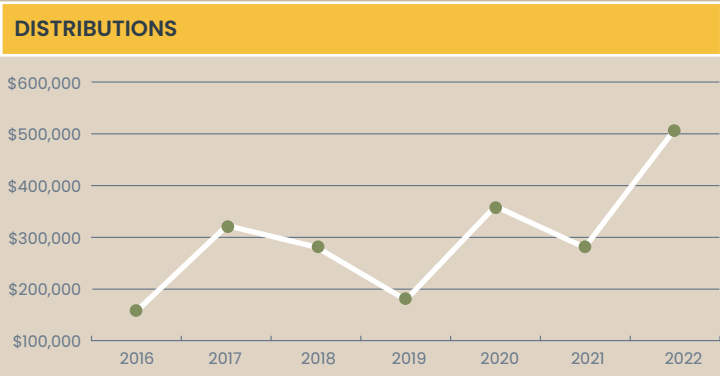
HOLISTIC COMMUNITY FOCUS:

We connect donors to opportunities across our region in a variety of charitable categories such as basic human needs, the arts, education, youth services, the environment, and more. Where do you want to be? That's where we are.



GRANTS BY FUND TYPE	
Fiscal Sponsorship	\$227,984.00
Donor Advised	\$75,402.23
Opportunity	\$68,040.45
Other	\$44,268.43
Scholarships	\$43,000.00
Community Chest	\$31,400.00
Field of Interest	\$19,602.70
TOTAL	\$509,697

DISTRIBUTIONS BY CATEGORY	
Fiscal Sponsorships	\$227,984.00
Youth & Education	\$70,361.65
Health & Social Services	\$58,891.24
Conservation/Environment	\$48,439.00
General Operating Support	\$48,043.00
Sports & Recreation	\$18,872.00
COVID-19	\$18,806.11
Arts & Culture	\$18,300.00
TOTAL	\$509,697



Saddle Trail Property Acquisition Summary

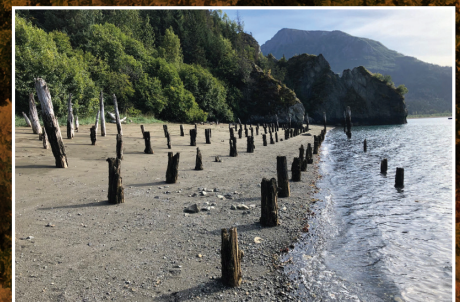
The Conservation Fund

The Conservation Fund received \$20,000 in grant funding from the Homer Foundation to support this acquisition project. With amazing fish and wildlife habitat, over 85 miles of hiking trails, and endless recreation opportunities, the Kachemak Bay State Park is an enormous asset to the community of Homer and our local environment. To ensure that public access is maintained and improved to the Kachemak Bay State Park, The Conservation Fund has acquired the Saddle Trail Property, a 5-acre private property in Halibut Cove adjacent to the Saddle Trail, one of the most popular hiking trails in Alaska. The Saddle Trail Property was once the location of a bustling herring saltery in the early 1900s and remnants of this historic operation are evident by the wood pilings that remain on the property's beach, locally known as "Hawaii Beach." Had The Conservation Fund not stepped in, the property could have been sold to another private buyer who could have developed the property and blocked public access to the Saddle Trail, and the beach. As the property's newest owners, The Conservation Fund is allowing public access and fundraising \$300,000 to be able to donate the property in 2023 to the Kachemak Bay State Park so public access will be protected forever.

"As a Homer resident, I can't express how much Kachemak Bay State Park and this property mean to me. I want my family to be able to enjoy Hawaii Beach and the Saddle Trail property for years to come."

Chris Little

The Conservation Fund's Alaska Associate



Project Website: <https://www.conservationfund.org/projects/protecting-a-key-piece-of-kachemak-bay-state-park>

Scholarships

This year the Homer Foundation awarded nineteen scholarships totaling \$44,000 to area students.

\$44,000
TO AREA STUDENTS

“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.’”

Mike Miller Homer Foundation Executive Director

19
SCHOLARSHIPS

15
STUDENTS

7
AREA SCHOOLS

This year the Homer Foundation awarded nineteen scholarships totaling \$44,000 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 330 individual scholarships totaling \$416,497.

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.



HOMER HIGH SCHOOL SCHOLARSHIP RECIPIENTS:
Liam Houlihan
Mariah McGuire
Isabel Kulhanek
Tyson Walker
Olivia Glasman

CONGRATULATIONS TO THE 2022 RECIPIENTS

ALAIN AND DANIEL RIESER SCHOLARSHIP
Mariah McGuire \$3,000

BELUGA TALE NONFICTION WRITING SCHOLARSHIP
Liam James \$3,000
Olivia Glasman \$3,000

DIANE WAMBACH “SHOOT FOR THE STARS” SCHOLARSHIP
Tyson Walker \$1,000

DREW SCALZI MEMORIAL MARITIME SCHOLARSHIP
Liam Houlihan \$1,000
Kapitolina Reutov \$1,000
Blake Lemons \$1,000

EDUCATORS PROFESSIONAL DEVELOPMENT SCHOLARSHIP
Jennifer Olson \$890
Steven Harrison \$720

FISH AND WILDLIFE SCHOLARSHIP
Blake Lemons \$2,000

HEALTH CARE PROVIDERS SCHOLARSHIP
Kapitolina Reutov \$3,000
Isabel Kulhanek \$3,000

HEATHER PANCRATZ MEMORIAL SCHOLARSHIP
Justin Trail \$500

KACHEMAK MEDICAL GROUP SCHOLARSHIP
Olivia Glasman \$2,000

MARY JOYCE ROBINETTE MEMORIAL SCHOLARSHIP
Blake Lemons \$8,000

NIKKI GERAGOTELIS (FRY) MEMORIAL SCHOLARSHIP
Kapitolina Reutov \$7,000

NURSING STUDIES SCHOLARSHIP
Jessica Sonnen \$1,500

PTARMIGAN ARTS VISUAL ARTS SCHOLARSHIP
Mariah McGuire \$2,000

SUTTON JAMES MILLER MEMORIAL SCHOLARSHIP
Alex Franklin \$1,000

KAPPA (KAPITOLINA) REUTOV

Kappa (Kapitolina) Reutov is attending Colorado State University to study sports medicine. Kappa is the recipient of \$11,000 in awards with the Nikki Geragotelis (Fry) Memorial, the Health Care Providers, and the Drew Scalzi Memorial Maritime Scholarships. Speaking as the recipient of the Scalzi scholarship, "I am very proud of being part of the fishing community and helping support my family. Learning from the hard work and long hours has helped me push through so many obstacles. I am really excited about my new journey to Colorado State University!"

**BLAKE LEMONS**

Blake Lemons is also attending Colorado State University to study zoology and wildlife biology, and then move back to Alaska and pursue a career in the field. Blake states "I am truly honored to be the selected scholarship recipient to aid me in this journey of mine and I hope to fully live up to the high expectations that I have set for myself." Blake was selected for the Drew Scalzi Memorial Maritime, the Fish and Wildlife, and the Mary Joyce Robinette Memorial Scholarship for a total of \$11,000.

**JESSICA SONNEN**

Jessica Sonnen is attending Simpson University and has been accepted into the nursing program there as a junior. She is the recipient of the Nursing Studies Scholarship. Jessica says "I want to be in a workforce that is striving towards tangible change in people's lives."



YAC is Back!

RELAUNCH

The Youth Advisory Committee (YAC) is an award-winning youth to youth philanthropy program of the Homer Foundation. After a break due to the effects of COVID-19 protocols, we relaunched this great program at Homer High School. Previously, former Homer Foundation Board member Bonnie Jason did an amazing job growing and cultivating this program at the middle school. This year Executive Assistant, Lauren Seaton (herself a former educator) coordinated the program. Homer High School leadership and staff were very supportive of this program in their space and participants not only learned about how philanthropy addresses community needs but also earned community service hours for participating.

FUNDING

Funding for this year's YAC grants was at an all-time high of \$10,000. Those funds come from a combination of the Foundation's Opportunity Fund, other existing endowed Foundation funds, such as Ashley Logan Fund, Sheldon Youth to Youth Fund, David and Mary Schroer Fund and donors who have a passion about developing a philanthropic mind set in young people. We are deeply thankful to those donors who make the YAC grants possible.

YOUTH LEAD/YOUTH CENTRIC

The YAC has a strong youth voice philosophy and determines its own program goals for its grant cycle. The group decided not to be project specific as in the past, instead supporting programs in the 12-18 year old range whether they be new or ongoing. When reviewing the applications, the students reflected upon their desired values of supporting diversity, increasing reach for organizations, and supporting organizations outside of Homer.

AWARDEES

This year the following awards were recommended by the YAC:

Bunnell Street Arts Center	\$500
Homer Council on the Arts	\$2,000
Kachemak Bay Family Planning Clinic <small>The Rec Room</small>	\$2,000
Kachemak Bay Running Club	\$1,500
Kachemak Nordic Ski Club	\$1,000
Ninilchik Saturday Lunch Program	\$1,500
South Peninsula Behavioral Health Services	\$1,500
TOTAL	\$10,000

**Thanks to the 2022 YAC members**

(in order of picture): Liam Boss-Harmon, Ainsley Boss-Harmon, Thea Person and Taylor Stepp (not pictured). A special thank you to staff member, Mrs. Lisa Fellows and the HHS leadership team. We look forward to more youth philanthropy at Homer High School!

Financial Summary

Long-term

That is the view the Homer Foundation takes when investing our endowed funds. We want funds to endure so they provide services to our community for decades to come. We chose Vanguard to manage our funds as they have a well-respected strategy for long-term, and low-cost, investing. During a market downturn, as we have recently seen, the strategy is to hold and wait. We believe that this will provide the long-term stability that our community deserves. The Foundation is now also serving non-endowed funds, where community groups have asked us to invest their monies for their future needs. These needs may be short-term or mid-term, therefore we use the Vanguard strategy appropriate for these shorter time frames. The monies are still invested, with risks of market fluctuation, but with a lower risk strategy than our endowed funds. We hope our various risk strategies serve our communities needs, well into the future.

Paula Martin

Treasurer



Revenue and Support

Contributions	\$ 1,045,211
Net Earned Income	\$ 56,536
Investment Gains (Losses)	-\$745,926
TOTAL	\$335,820

Expenses

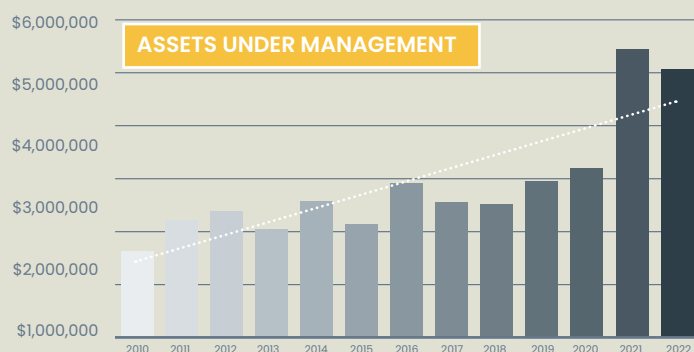
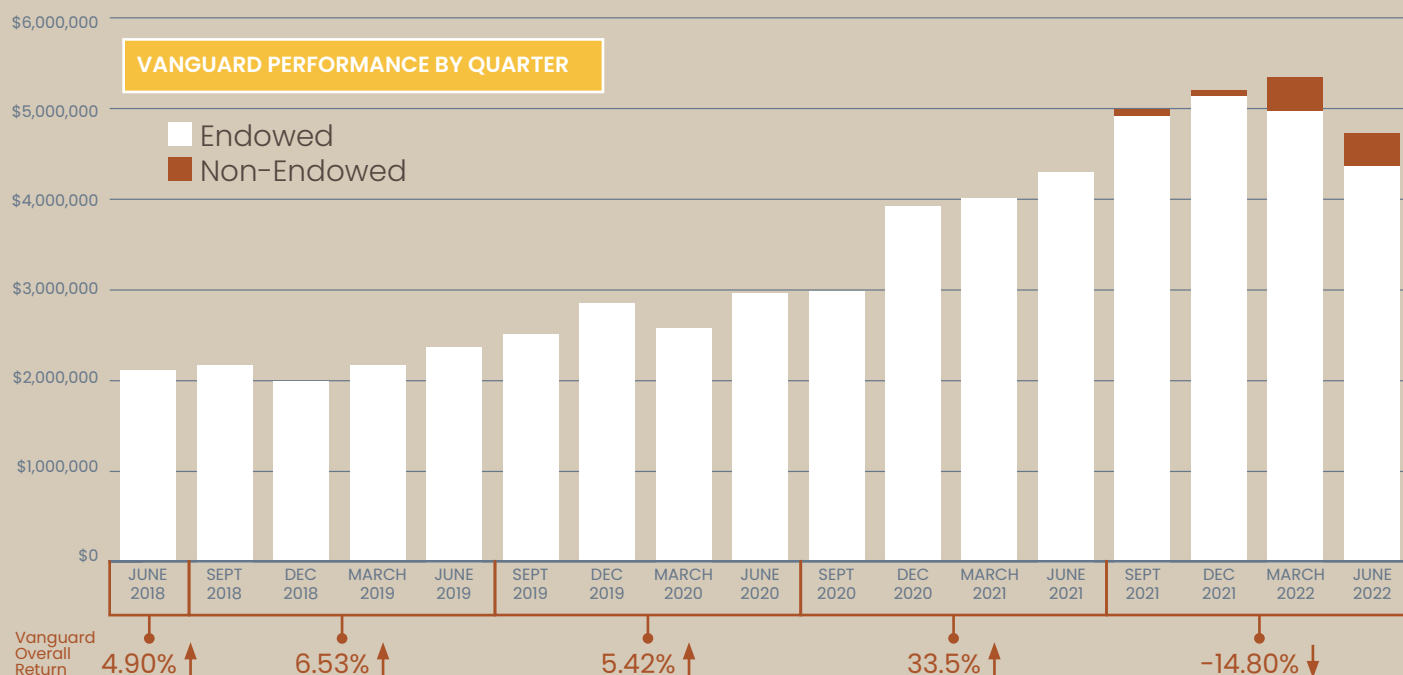
Grants from Participating Funds	\$ 109,957
Grants from Restricted Funds	\$ 171,757
Fiscal Sponsorships	\$227,984
Other Distributions	\$ 90,557
Personnel	\$ 97,484
Operating and Program Expenses	\$ 68,569
TOTAL	\$766,307

Donated Good and Services

\$6,400

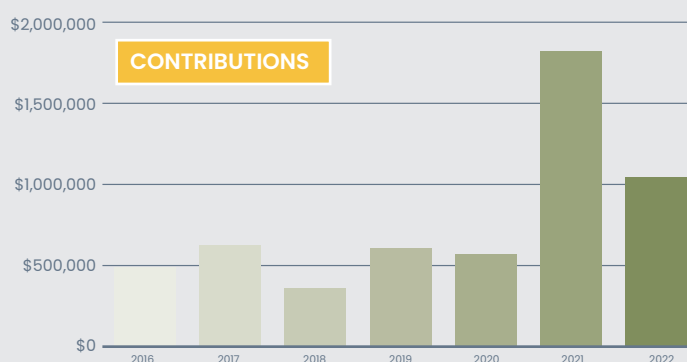
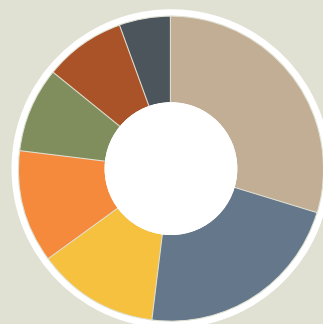
Net Assets as of June 30, 2021	\$5,082,355
Increase/Decrease in Net Assets	-\$410,487
Net Assets as of June 30, 2022	\$4,671,868

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.



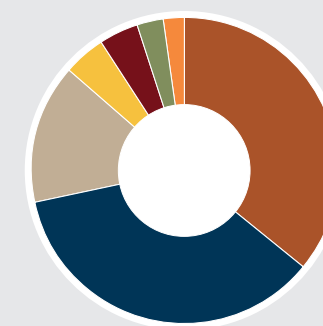
MANAGED ASSETS BY FUND TYPE

Donor Advised	\$1,509,459
Unrestricted	\$1,121,055
Scholarship	\$667,779
Field of Interest	\$609,961
Agency Endowments	\$446,165
Non-Endowed	\$438,874
Restricted	\$268,519
TOTAL	\$5,061,813



CONTRIBUTIONS BY FUND TYPE

Non-Endowed	\$376,202
Opportunity	\$373,119
Donor Advised	\$155,409
Scholarship	\$47,183
Special Projects/Other	\$43,566
Agency Endowments	\$29,002
Field of Interest	\$20,731
TOTAL	\$1,045,211



Family of Funds

UNRESTRICTED FUNDS

Homer Foundation Opportunity Fund
Julia Park Howard Unrestricted Fund
Steve and Noko Yoshida Fund
The Jenson Fund
Homer Foundation Admin Fund
Aquila Fund

SCHOLARSHIP FUNDS

Established to benefit a particular institution or field of study.

Alice Witte Memorial Scholarship Fund
Bill & Liz Johnson Teacher Education Scholarship 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
Kachemak Medical Group Scholarship Fund
Mary Joyce Robinette Memorial Scholarship Fund
Nikki Geragotelis (Fry) Memorial Scholarship Fund
Nursing Studies Scholarship Fund
Ptarmigan Arts Scholarship Fund
Sutton James Miller Memorial Scholarship Fund
Thor's Scholarship

NON ENDOWED FUNDS

For individuals, groups, or organizations who are looking to make a difference in their community during their lifetime or a set period.

Friends of the Homer Public Library Non Endowed Fund
Friends of Kachemak Bay State Park Agency Stewardship Fund
Homer Community Food Pantry Sustainability Fund
Homer Rope Tow Stewardship Fund
Hospice of Homer Agency Stewardship Fund
Kachemak Nordic Ski Club Stewardship Fund
South Peninsula Hospital Foundation Fund

FIELD OF INTEREST

Funds established to support a broad purpose or issue

A Music Education Fund
IN MEMORY OF RENDA HORN
Supporting Music Education
Anchor Point Fund
Benefiting nonprofits who serve the Anchor Point area
Ashley J. Logan Fund
To benefit youth
Bluegrass Fund
Supporting Health and Social Services
Brother Asaiah Bates Fund
Supports youth and families at risk
Choices for Teens Fund
Supports programs that empower youth
City of Homer Fund
Support nonprofits serving the residents of Homer
Constance M. Benston Fund
Supports cat care and music
Gary Thomas Memorial Fund
Benefiting community development
Homer-Kachemak Bay Rotary Club Fund
Supports Rotary Community Service Projects
Jessica M. Stevens Memorial Fund
Supports youth performing & visual arts
Kachemak City Fund
Benefit the residents of Kachemak City
Kevin Bell & Family Hockey Fund
Supports hockey
Library Endowment Fund
Supports Homer Public Library
Martha H. Briscoe Environmental Science and Conservation Fund
Supports Environmental Science, Education, and Conservation
Rotary Club of Homer Downtown Fund
Supports Rotary Community Service Projects
Sheldon Youth to Youth Fund
Supports Homer Foundation's Youth Advisory Committee
Spay & Neuter Fund
Supports Spay & Neuter Clinics

COVID-19 RESPONSE FUND CLOSE OUT

The Homer Foundation COVID-19 Response Fund started in 2020 and supported nonprofits that provided critical services through the Southern Kenai Peninsula whose missions were impacted by the pandemic. We closed out this fund in 2022.

Thank you to all who gave so generously.

\$70,405
IN GRANTS AWARDED

20
NONPROFITS

55
GRANTS

88
DONORS

AGENCY ENDOWMENT FUNDS

Funds established for the benefit of charitable organizations.

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
KBBI Public Radio Endowment Fund
Peter Larson Compassion in Action Fund
Pier One Theatre Gary Thomas Live Large Fund
Pratt Museum Fund
Storyknife Writers Retreat Fund

DONOR ADVISED

Funds established by an individual, family or business who wishes to participate in the distribution of the funds income.

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
James Family 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

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.

CITY OF HOMER GRANTS

Barb Angaiak
Sara Banks
Dave Derry
Mike Pate
Sara Reinert
Francie Roberts
Paul Seaton

COMMUNITY GRANTS COMMITTEE

Marie Carlton
Tom Collopy
Kathy Hill
Flo Larson
John Mouw
Lawrence Radcliffe
Sara Reinert
Francie Roberts
Paul Seaton
Carol Swartz
Chris Theno

SCHOLARSHIP COMMITTEES

Olga Amaral	Lin Hampson	Connie Pavloff
Kathie Baldwin	Alyssa Hill	Kalie Petska-
Emily Berg	Cheryl Illg	Rubalcava
Michelle Borland	Patti Jay	Nan Porter
Nancy Cline	Lauren Isenhour	Sue Post
Melissa Cloud	Nancy Lord	Paul Raymond
Rob Downey	Vicki Lowe	Francie Roberts
Mark Edminster	Gary Lyon	Barb Scalzi
Stan Eller	Rachel Miller	Helyn Schoepke
Ginny Espenshade	Vernon Miller	Paul Story
Debbie Fanatia	Pat Moss	Lisa Talbott
Jennifer Frazier	Loraine Murphy	Chris Theno
Bill Fry	Jessie Nelson	Joanne Thordason
Dorothy Fry	Sue Oesting	Caroline Venuti
Katie Gavenus	Ginnie Oliver	Claire Waxman
Paula Godfrey	Curt Olson	Ian Weatherly
Judy Gonsalves	Emilie Otis	Aleda Yourdon
Shirlie Gribble	Matt Pancratz	

Every Dream Matters, Every Donation Counts

Together we are building permanent philanthropic assets for our community.



WE OFFER

Flexibility & Focus

You decide how, when, and where to concentrate your donation. The Homer Foundation helps you transform your concerns into action.

Efficiency & Economy

Giving through a Community Foundation reduces or even 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

The Homer Foundation has the long-term local expertise necessary to identify pertinent local needs so that your donations can make the greatest difference.

Anonymity

We honor requests for privacy and are here to help you reach your philanthropic goals at your own comfort level.

Donors

IN-KIND

Bear Creek Winery
Bill & Dorothy Fry
Dibble Creek Rock LTD
Dutch Boy
Landscaping & Paving
Fetterhoff Services LLC
Fiddlehead Creative
Foster & Company
Jan Knutson &
Ed Hutchinson
Jeanne Walker
Liz & Ron Downing
Moore & Moore Services
Print Works
Tonsina, LLC
Wise Service LLC

TOWERING SPRUCE

\$5000+

Alaska Community
Foundation
Alyeska Pipeline
Service Company
Anonymous (4)
City of Homer
City of Kachemak
Conoco Phillips Alaska
East Road Services
Elaine Grantier
ENSTAR Natural Gas
Company
Grace Ridge Brewing LLC
Homer Community
Food Pantry
Hospice of Homer
Kachemak Ski Club
Kathy & Roger Herrnsteen
KBBI Kachemak Bay
Broadcasting Inc.
Laura Patty
Petro Marine Services
Philemon Morris
Richard L. & Diane M
Block Foundation
Richard Leier
South Peninsula Hospital
Foundation
Steve & Vicki Albert
Thomas & Colleen James

STURDY BIRCH

\$1000-\$4999

Adrian & Lauren Isenhour
Alaska Realtors
Alaska USA Federal
Credit Union
Angela & Wesley Head
Angstman Law Office
Anonymous (5)
Arlene Ronda
Awesome Foundation
of Alaska
Beverley & Leo Nikora
Bill & Dorothy Fry
Bill Palmer &
Shirley Fedora
Bobby & Sharon Wilson
Buck & Shelly Laukitis
Catherine &
Michael McCarthy
Coastal Realty
Dartmouth College
Dave Berry
Denise & Gordon Pitzman
Earl Marion Hill
Elizabeth Cumming
Emerald Air Service, Inc.
Emmitt & Mary Trimble
Gary & Evelyn
Waltenbaugh
Haas & Spigelmyer, Inc.
Hayne Ellis & Linda
Whitlach
Helms Foundation
In Honor of Kristen Bell
Homer Electric
Association
Homer Elks Lodge #2127
Homer Seaside Properties
Jeanne Anderson
Jo & Peter Michalski
Julie Derry
Kachemak
Medical Group
Ken & Chow Taylor
Konrad Schadd &
Gabby Husmann
Lori & Tom Zitzmann
Lower Peninsula
Power Sports Inc.

Mary & Donald Sanders
Mary Frishe &
Tom Collopy
Matt & Rebecca Clarke
Melvyn Strydom-Klingel
Nelson & Lilia Co
Paula & Joe Martin
Ptarmigan Arts
Cooperative Corporation
Robert Hubbard
South Peninsula Hospital
South Peninsula
Hospital Medical Staff
Steve & Chris Theno
Steve & Noko Yoshida
Steven Eayrs
Storyknife Writers Retreat
Tom Kizzia

WILD FIREWEED

\$250-\$999

Aaron Stiasny
Aftershock Automotive
All Seasons Honda
American Legion General
Buckner Post 16
Amy Velsko
Anonymous (2)
Bay Club LLC
Best Western Bidarka Inn
Bhree Roumagoux
Bob Shavelson &
Miranda Weiss
Bobby Copeland &
Michael McKinney
Brenda & James Dolma
Carol Swartz & Bob Cole
Carrie Bishop
Cheryl & Mike Illg
Christie & Ty Gates
Christine &
Deland Anderson
Christopher &
Linda Robinson
Coordinators Interior
Design Group
Deb Leisek & Jim Long
Debbie & Jack Oudiz
Denise & Roger Clyne
Elaine Burgess
Elizabeth Perry
Esther & Tabor Ashment
George Skraba Reising &
Deborah Klein
In Honor of Flo Larson
Giving Salmon
Halcyon Heights B+B
Homer Art & Frame
Homer Dental Clinic
Ja vell
Jillian Rogers
Jordan Dyer
Kachemak Bay
Title Agency
Kachemak
Wilderness Lodge
Kalie Petska-Rubalcava
Kathryn Carsow
Katie Jo Gamble
Kayla Owen
Kim Marrale
Lee & Sandy McDaniel
Lin Hampson &
Richard Chiappone
Liz & Ron Downing
Maxine & Dave Weber
In Memory of Walter &
Elaine Weber, and Leland
& Woneta Shanker
Mike Miller &
Robin Albright
Morgan Christen &
James Torgerson
Nancy Levinson
Northern Enterprises
Boat Yard
Preventive
Dental Services
R.A. Long Foundation
In Honor of Hayne Ellis
Ralph Broshes &
Deb Lowney
Realty One Group Aurora
Roberta Highland &
Robert Archibald
Ryan Smith
Samantha Stafford
Scott Meyer
Shirley & David Sanders
Summit Physical Therapy
Superior Label
of Alaska, Inc.
Susan Oesting
Susie Amundson
Thomas Dale Henson
Tom & Catie Bursch
Tracy Asselin

Denise & Roger Clyne
Elaine Burgess
Elizabeth Perry
Esther & Tabor Ashment
George Skraba Reising &
Deborah Klein
In Honor of Flo Larson
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Halcyon Heights B+B
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Thomas Dale Henson
Tom & Catie Bursch
Tracy Asselin

Christa Collier &
Charles Ingham
Christina Demetro &
Eric Mouffe
Christina Seay
Christine Caffee
Cindy and Alex Koplin
Claudia Haines &
Steve Glasman
Connie and Kerry Ozer
Dale & Dianne
Spence-Chorman
Dale Banks
Darius Baltz
David & Christianne
Caffee In Honor of
Claudia Caffee-Delapp
David & Ruby Nofziger
Diane Kaplan
Dolores & Bill Butler
Donna Brockschmidt
Dorothy "Duffy" Clarke
Dr. Nancy M Livingston
Ed & Sara Berg
Eleanor Andrews
Elizabeth Shepherd
Parrish & Josephine Thore
Emilie & Edward Otis
Eric & Jennifer
Waltenbaugh
Erik & Lacey Velsko
Francie Roberts
Franco & Caroline Venuti
Gail Flotre
Gart and Deb Curtis
Ginny Espenshade &
Paul Gavenus
Grace &
Michael Halstead
Greta Mahowald
Hal Smith &
Susan McLane
Heidi Stage
IBM Employees
Service Center
James & Judy Lyles
James & Julia McCarron
James & Teresa Calhoun
Jana Hayenga
Jane Buncak
Jane Miles & Lolita Brache
Janet Fink
Janet Rumble
Janice Cooker
Janie Leask & Don Reed
Jeannie Woodring &
George Matz
Jennifer Medley
Jim & Karen Hurd
Jim & Ruth Lavrakas
JoAnne Giza &
Charles Gizatte
John and Ann Anderson
John Robertson
In Honor of Donna &
Wayne Aderhold
Jolee Ellis
Joy Marchbanks
Joy Steward & Stu
Schmutzler
Judy Gonsalves &
Daniel Layland
Kachemak Country
Publications
In Honor of Flo Larson
Karen Northrop &
Doug Reid
Kasandra Devaney
Kathy & Maynard Smith
Kelly Perry

Ken & Linda Satre
Ken Castner & Nancy Lord
Ken Landfield &
Sue Wohlgemuth
Krant-Rosenbloom Family
Lauren & Rand Seaton
Lawrence & Gail Radcliffe
Lisa & Robert Fellows
Lisa Krebs
Lisa Vaughn
Lora Wilke
Lorraine Haas
Louis, Jasmine &
Maggie Maurer
Margaret Lau
Mari-Anne &
Maynard Gross
Marilyn & Steve Engel
Marion Kinter & Gerard
Garland
Mary Ferguson Bell
Matt Breece
In Memory of
Julia Park Howard
Maureen Peppers
Michael & Karen Stone
In Memory of
Elaine Grantier
Michael Gracz
Michael Mullan & Virginia
Howard Mullan
In Memory of
Julia Park Howard
Nancy Koropp
Nancy Schrag
North Wind Home
Collection
Ole Andersson &
Jinky Handy
Pacific Sun Charters
Patrice Parker
Patricia Green
Paula & David Godfrey
Peter Crimp
Rachael Kincaid
Ray & Dianne Brown
Rene Alvarez &
Suzanne Singer
Rich & Helen Gustafson
Robin & Gina Daugherty
Rosie Tupper
Rowland Waterman
Roy Wilson
Sandy St George
Sara & Johnny Sims
In Honor of Debbie &
Thomas Fanatia
Saundra Hudson
& Chris Perk
Shari Daugherty
South Peninsula
Hospital Rehabilitation
Department
Sue Mauger
Susanne Ratcliffe Wilson
Tara Hagge
The Grog Shop, MSA, Inc.
Tim Isaacson
Tom & Debbie Fanatia
Tonda & Joe Allred
Travis Gates
Tyler Jones
Van & Katelyn
Hawkins-Wythe
Vicky Gordon
Victoria Steik
Wayne & Donna Aderhold
Yvonne Leutwyler



ESSENTIAL SEEDLINGS

\$1-\$249

Aaron Bartel
Anonymous (15)
In Honor of Alice Porter
Alyse Galvin
Angie & Chris Newby
Anne Connors
In Memory of
Elaine Grantier
Ardith Mumma
Bernadette Arsenault
Bette & Glenn Seaman
Bill Bell & Mary Lou Kelsey
Bonnie Jason &
David Schneider
Carol A Coleman
Charles & Nancy Evans
Charles Landmesser

Building Community

Assets for Today, Tomorrow and Forever.

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.

IRA CHARITABLE ROLLOVER GIFTS

If you are 72 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.

At some point, you have to withdraw money from your IRA. Once you turn 72, you must take a required minimum distribution (RMD) each year from your IRA, and the RMD amount increases with your age. 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 a tax penalty.

WHAT IS AN IRA CHARITABLE ROLLOVER GIFT?

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.

THE BENEFITS OF AN IRA CHARITABLE ROLLOVER GIFT.

An IRA Charitable Rollover gift offers several benefits. Because the transfer generates neither taxable income nor a tax deduction, you benefit even if you do not itemize your deductions. This is especially relevant since the standard deductions have recently been increased, making itemized deductions less appealing.

HOW DO YOU MAKE AN IRA CHARITABLE ROLLOVER GIFT?

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.

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

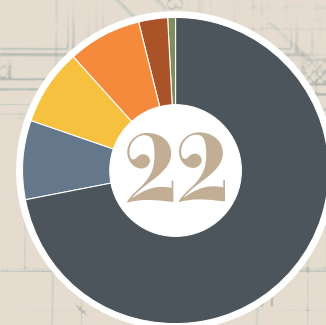
Our EIN: 92-0139183

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 with your IRA Rollover gift.

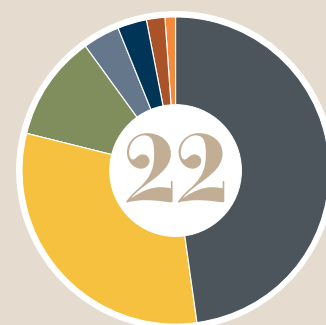
Gifts at a Glance

DONATIONS AMOUNT BY TYPE



Check	72.17%
Cash	8.19%
Credit Card	8.14%
Stock	7.81%
RMD	2.96%
Pick-Click-Give	.73%

DONATIONS TYPE



Check	48%
Credit Card	31%
Pick-Click-Give	11%
Cash	4%
In-Kind	3%
RMD	2%
Stock	1%

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



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



Donate cash, stocks and securities



Donate through corporate employee matching fund



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



Donate your time through joining one of our committees

Pick.Click.Give.

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



Halibut Cove Live

The tenth edition of Halibut Cove Live is in the books! Incredibly, the ninth annual event was held way back in 2018. Little did any of us know back then that it would be four long years before we gathered again at the incomparable Quiet Place Lodge. Given this lengthy gap it felt like a reunion with a long-lost friend.

Both nights featured the music of the North Atlantic Jazz Alliance, headed by Markus Burger, and the fine Alaskan cuisine of acclaimed Chef Aaron Apling-Gilman.

Saturday evening was made more meaningful thanks to a \$10,000 matching donation challenge by Diane Kaplan, CEO of the Rasmuson Foundation. The crowd rose to the occasion and gave over \$11,500 in response to her pledge. This \$21,500 total was money that was all over and above what we had expected to raise. We are grateful to Diane Kaplan, the Rasmuson Foundation, and all of the donors who gave towards the match.

On Sunday evening, we had a second challenge match offered by Paul Seaton that raised an additional \$2,000 for the Foundation. This provided the perfect exclamation point on an exciting weekend of giving, which raised nearly \$25,000 of unexpected donations for The Homer Foundation. We thank Paul and all of the Sunday donors who graciously gave to support local enrichment through the Foundation.

Thank you to our hosts, Harmon and Pauli Hall of Quiet Place Lodge, and an amazing team of community volunteers (too many to name) who made this event happen! We could not do it without each of you. Thank you also to our sponsors:

Chef Aaron Apling-Gilman

The Grog Shop

Alaska Coastal Marine

Homer Brewing

The Saltry Restaurant

Alaska Shellfish Farms, and

Snow White Linen Supply

Halibut Cove Live continues to be our most important fund-raiser and friend-raiser. We look forward to presenting the 11th edition of this unique event next summer. Be sure to check 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 Through The Homer Foundation


Leave a Legacy: Leaving a gift to your community in your estate plan 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 passion, receive an immediate tax benefit, and recommend grants to the local 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
in Homer
*located in the lower level of the
Kachemak Bay Title Building*

 info@homerfoundation.org

 www.homerfoundation.org

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