

# GROWTH 2023

ANNUAL REPORT



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

# OUR 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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# GROWTH

As with every annual report, we've packed this booklet with as much information as we can about our finances, volunteers, amazing donors, and stories of impact. We even manage to squeeze in a few statistics. We hope you enjoy it, and that you are informed and inspired by what you find inside.

The old saying goes, "the only thing constant is change." For the Homer Foundation we could say the only thing constant is growth. Every day we are humbled at the ever-increasing number of donors who want their gifts to have a "forever" impact through the Foundation.

We crossed some significant milestones last year. Since 2019, our total assets have doubled in size. That's amazing. What's more amazing is those four years included a pandemic and economic down turn. How did we do that? Partially through a significant bequest gift. Partially through overall positive investment performance (market downturn notwithstanding). And most importantly, through many new funds and

donations. In 2019 we had 56 charitable funds. Today, at the end of 2023 we have 84 active funds. That's a 50% increase.




It's because of you, our community of donors, that we can report these accomplishments.

We serve the philanthropic needs of the southern Kenai Peninsula. All of these funds and growth are a means to an end. That "end" being "...to enhance the quality of life for the citizens of the greater Homer area by promoting philanthropic and charitable activities." In the midst of this growth, as we change and expand, we continually remind ourselves of this and stay focused on doing the good there is to do.

**MIKE MILLER**  
EXECUTIVE DIRECTOR

**VAN HAWKINGS**  
BOARD PRESIDENT

## Some significant milestones that we passed this year are:

-  More than \$10,000,000 in total donations since 1991. (Includes charitable funds and pass-through donations)
-  Over \$5,000,000 distributed in grants and scholarships
-  Over \$5,700,000 in total assets

## STAFF



Mike Miller  
Executive Assistant



Lauren Seaton  
Executive Assistant



Jonathan Hamilton  
Director of Development and Marketing

# 2023

## BOARD OF TRUSTEES



Doug Baily  
Trustee



Dave Derry  
Trustee



Liz Downing  
Trustee



Van Hawkins  
President



Paula Martin  
Treasurer



Denise Pitzman  
Vice President



Sara Reinert  
Trustee



Paul Seaton  
Community Grants  
Committee Chair



Terri Spigelmyer  
Development  
Committee Chair



Ken Taylor  
Secretary



Chris Theno  
Trustee



Lawrence  
Radcliffe  
Trustee



Tom Zitzmann  
Trustee

### NEW BOARD MEMBERS

**DOUG BAILY:** Doug first arrived on the Spit in 1957 to join a commercial crab fishing crew. Following service in the Army, and two years in oil exploration on the North Slope, Doug entered a legal career which has spanned nearly 60 years. In addition to private practice, he has served as Anchorage District Attorney, U.S. Attorney for Alaska, and as Alaska's Attorney General. Doug has served as a member of the Committee for the Creation of Chugach State Park, as a Trustee of the Alaska Permanent Fund, and as Chairman of the Alaska Parole Board. As a volunteer firefighter, he earned the rank of Firefighter II at age 77. Doug is the secretary of Kachemak Gun Club, and a member of the Homer Public Library advisory board. He and his wife, Landa, are now full-time residents of Homer.

**TOM ZITZMAN:** Tom has lived in Homer since 1983 and has 44 years of experience in finance, tax, and financial planning. He is still working in the area of public accountancy and is a licensed CPA. He remarks, "I would like to share my professional knowledge with an organization that is instrumental in providing our community with resources which strengthen us. I would also like to educate prospective donors on how giving to the foundation can be incorporated into a donor's estate plan." While not working in finance, Tom can be found cycling, kayaking, skiing, birding, boating, and reading.

### DENISE PITZMAN INCOMING PRESIDENT

Our secret is out. Have you heard that it seems our area is where everyone wants to live? It's true - and for good reason! Our board of trustees, drawn from different parts of the community, has the job of keeping up with growth and change in our area and making sure the foundation is ready to respond to needs as they evolve. The conversations around our board table are wide-ranging as we set policy and direction - and they are fun too! The experience and dedication of our board members keep the foundation focused on its mission of connecting generosity to community need. We are on it.

# THANK YOU

## 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

|                  |              |             |
|------------------|--------------|-------------|
| Kasey Aderhold   | David Duke   | Paul Seaton |
| Uran Christensen | Britta Frank | Ken Taylor  |
|                  | Sara Reinert |             |

### COMMUNITY GRANTS COMMITTEE

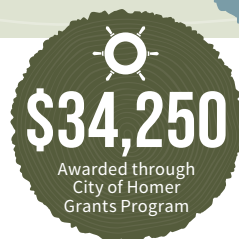
|               |                |                 |
|---------------|----------------|-----------------|
| Marie Carlton | Shema Jones    | Francie Roberts |
| Tom Collopy   | Flo Larson     | Carol Swartz    |
| Kathy Hill    | John Mouw      | Chris Theno     |
|               | Linda Robinson |                 |

### SCHOLARSHIP COMMITTEES

|                  |                 |                        |
|------------------|-----------------|------------------------|
| Olga Amaral      | Lin Hampson     | Kalie Petska-Rubalcava |
| Esther Ashment   | Alyssa Hill     | Nan Porter             |
| Kathie Baldwin   | Cheryl Illg     | Sue Post               |
| Jennifer Bando   | Alicia Isenhour | Paul Raymond           |
| Emily Berg       | Lauren Isenhour | Jen Rhue               |
| Pat Boone        | Patti Jay       | Francie Roberts        |
| Khristy Chapman  | Nancy Lord      | Stephanie Rodriguez    |
| Melissa Cloud    | Vicki Lowe      | Barb Scalzi            |
| Deb Curtis       | Deb Lowney      | Helyn Schoepke         |
| Rob Downey       | Gary Lyon       | Karen Shemet           |
| Liz Downing      | Rachel Miller   | Paul Story             |
| Stan Eller       | Scott Miller    | Lisa Talbott           |
| Ginny Espenshade | Casey Moss      | Chris Theno            |
| Derotha Ferraro  | Pat Moss        | Sydney Thielke         |
| Janet Fink       | Jessie Nelson   | Caroline Venuti        |
| Jennifer Frazier | Sue Oesting     | Ian Weatherly          |
| Bill Fry         | Ginnie Oliver   | Blaine Wright          |
| Dorothy Fry      | Curt Olson      | Danielle Wythe         |
| Katie Gavenus    | Emilie Otis     | Kevin Wythe            |
| Paula Godfrey    | Connie Pavloff  |                        |
| Judy Gonsalves   | Tulio Perez     |                        |
| Shirley Gribble  | Jacque Peterson |                        |



# 2023 A YEAR IN REVIEW





# DEVELOPMENT COMMITTEE

On a beautiful Spring morning in April, with the sun brilliantly shining and the birds offering a chorus of enthusiasm, the Homer Foundation hosted its first annual “Eggs Benefit Breakfast” at Land’s End. The atmosphere was electric with the thrill of social engagement in a community recovering from a pandemic. And our 60 guests responded! They embraced the opportunity to learn about the growth of the Homer Foundation, and they graciously supported the health of our community through generous giving. It was a record day!

Earlier in the year, we had a second significant growth moment as well. With support from a major grant from MJ Murdock Charitable Trust, the Homer Foundation onboarded a Director of Marketing & Development, expanding our capacity by fifty percent! The new staff team has focused on sowing the seeds of philanthropy through a broader sharing of purpose and opportunity to the entire lower Kenai Peninsula.

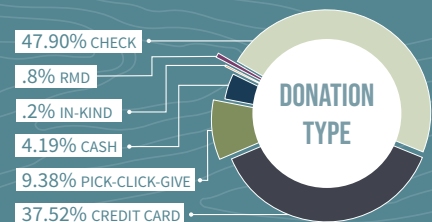
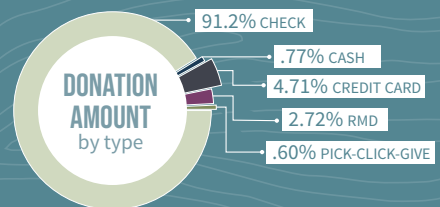
Finally, new growth was demonstrated this year through the opening of ten new funds. The addition of the Ninilchik Community Fund provides an opportunity to support local causes important to them. Additionally, new products were added to the Homer Foundation portfolio, including the new Community Cares Fund, expanding the opportunities to share in the joy of supporting a healthy, growing community.

**TERRI SPIGELMEYER**  
DEVELOPMENT COMMITTEE CHAIR

**MANY THANKS** To our generous donors, who nurture this kind of growth.



## GIFTS AT A GLANCE



# 2023 NEW FUNDS



## **NORTHSIDE TRAIL FUND**

“The Northside Trail fund was started as a donor advised fund by an individual who is passionate about hiking. The donor moved to Homer after living in Anchorage for 35 years and quickly realized there are no hiking trails on the northside of Kachemak Bay that people of all ages and most physical abilities can access. The purpose of this fund is to develop and maintain sustainable, non-motorized hiking trails on the north side of Kachemak Bay. The fund can be used to develop programs that teach kids to be trail stewards, the importance of trails, the concepts of trail maintenance, and to help with trail maintenance.

My favorite quote on this topic is ‘the trails across the bay are for the financially elite and physically elite.’ It costs more than most folks can afford to go across the bay, and with the exception of Grewingk, the trails go straight up once you hit the beach. The Rogers Loop Trailhead averages 700 users-per-week during the summer and Eveline SRS 1000 averages users-per-week. Homer is desperate for trails on the northside of the Bay.” – CAMEALE JOHNSON

## **PEONY GARDENS’ BEAUTIFICATION FUND**

With the establishment of the annual Homer Peony Celebration, there was a desire to create a fund dedicated to maintaining and enhancing the exquisite beauty of the peony gardens within Homer’s commercial business district. This fund will help maintain the existing peony gardens, ensuring that they remain a vibrant and captivating sight for all to enjoy. It will also establish new peony gardens to enhance the visual appeal of our commercial business district, inviting people to stop and linger. It will fund expert care and preservation of our peonies, ensuring their health and longevity. Every donation goes directly towards the upkeep of our peony gardens. The program, including applications and approval of projects, is overseen by the Homer Chamber of Commerce, while the management and distribution of the fund is handled by the Homer Foundation.



### HOMER VOLUNTEER FIRE DEPARTMENT – FIRE INVESTIGATION TRAINING FUND

“Here at the Homer Volunteer Fire Department, we were very fortunate for years to have a dedicated Fire Investigation Team with Gary Thomas leading point on this. With any fire, despite the outward appearance of simple charred and destroyed material, there is a pattern that can be read by the trained eye. Being able to read the scene and determine the point of origin for the fire and the probable cause are critical to understanding why property burned, and at times essential to preventing future such events. Gary Thomas’s enthusiasm for the forensics of fire and sleuthing out the culprit was legendary. In one example, he determined that a large exterior fire on a Pioneer Avenue business was caused by planters outside the business being used for cigarette disposal; the owners didn’t realize that potting soil had a high potential for ignition, and had left them up after summer’s end to near-disastrous results. His investigation pinpointed the cause and helped spread the word to other businesses to better protect themselves.

With the generous funding from the estate of Gary Thomas and with Laura Patty’s help, HVFD is supporting a new generation of Fire Investigators to step into the role to help our community be safer. Fire Investigation is a very focused science, and any aid that we have in getting training, experience, and education in this field is invaluable. HVFD is also grateful to the Homer Foundation for keeping this going.”

– MARK KIRKO, FIRE CHIEF

### COOK INLET CLIMATE ACTION FUND

This fund will support community-led climate action projects within the Cook Inlet watershed, with an emphasis on the establishment of woody vegetation to meet conservation goals.

### SHELDON PURCELL FUND

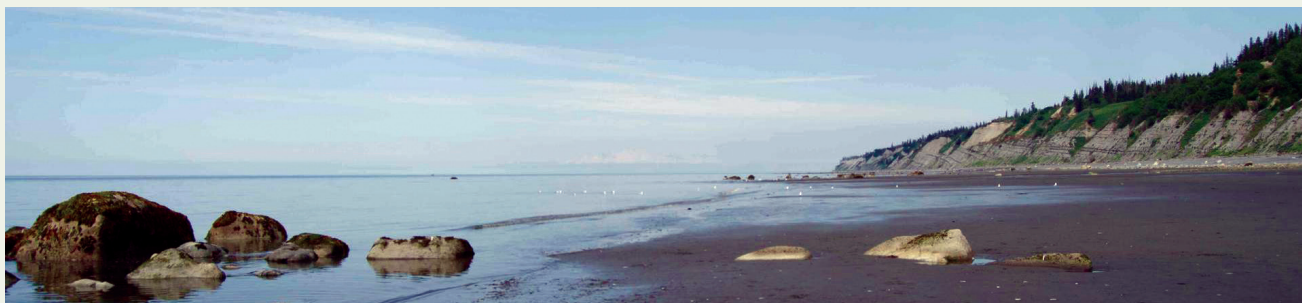
Robert and Melon Purcell have established the Sheldon Purcell Fund in memory of their son. This is the second such fund the Purcell’s have founded at the Homer Foundation, and the purpose of this one is to support youth-led, youth-focused grantmaking by the Homer Foundation’s Youth Advisory Council (YAC). This donor-advised fund will make annual matching grants of up to \$10,000 to enhance the pool of money that the YAC has to work with each year in their youth-led decision-making process. This will effectively double the current amount of money that the YAC is able to grant annually, thus doubling the community impact.

### MARILYN WYTHER “BELIEVE IN YOURSELF” SCHOLARSHIP FUND

This new scholarship was started by the family of Marilyn Wythe to honor her memory. Marilyn was a beloved school administrative assistant who passed away in 2022 at the age of 65. Her husband and children decided to honor her memory by establishing a scholarship for local high school graduates, with financial need being a significant component of the scholarship criteria. It is also weighted towards students who have voluntarily served their community in some way.

### NINILCHIK COMMUNITY FUND

The village of Ninilchik has come together to establish their first community fund with the Homer Foundation. Led by founding donors Lara McGinnis and Jim Stearns, the Ninilchik Community Fund has already met the \$10,000 minimum threshold to become an active fund at the Foundation (active funds are able to begin grantmaking; acorn funds are seed funds that have not yet reached the \$10,000 threshold required to begin actively grantmaking). This fund is an exciting strategic addition to the Foundation, as we seek to underscore the breadth of our service area – from Ninilchik to Nanwalek, and everywhere in between. We now have community funds established for Anchor Point, Homer, Kachemak City, and Ninilchik, and are eager to work with any other South Peninsula communities to establish your fund!



# DONOR STORY



**LIKE MANY IN THIS COMMUNITY, WE WERE AWARE OF THE HOMER FOUNDATION AND KNEW SEVERAL OF THE FOUNDING MEMBERS.**

As the community grew, so did the Foundation, along with its impact on the community and residents. When we lost our son at 18, we thought we would like to support our youth by creating the Sheldon Youth to Youth endowment with the assistance and help guidance of the Youth Advisory Committee the help identify the needs and direct the funds to best support our youth.

This is just one example of the wide range of efforts that the Foundation facilitates by providing funding to orga-

nizations and individuals. The strength of our community is the many volunteers that support the quality of life in here. Individuals and families who make contributions or legacy commitments to the Homer Foundation play a valuable and appreciated role in these efforts. Melon and I would like to thank the Foundation and everyone who has contributed to its success as well as encourage you spread the word about the role the Homer Foundation plays in our community and to seek out new contributors.

**ROBERT & MELON PURCELL**





WHY DONATE  
TO THE HOMER FOUNDATION

# WHAT WE OFFER OUR DONORS

Together we are building permanent philanthropic assets for our community.

## 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.



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

## NEW BEQUEST FUNDS

Some bequest donors want to know exactly what their legacy gift will do with the Homer Foundation.

They do this by pre-establishing a fund to receive their gift. Here are the ones established in 2023.

### JIM & RUTH LAVRAKAS MEMORIAL SCHOLARSHIP FUND

“We know how a little help and encouragement can jumpstart a young person’s passion. The Jim & Ruth Lavrakas scholarship will help a local student who has an interest in Mass Communications. Jim comes from a newspaper background, but with the advent of the Internet the field is wide open.”

– JIM LAVRAKAS

### HAPPY HOUSE FUND

An anonymous local donor came forward with a desire to start an endowed fund which will make grants to the already existing Homer Community Chest Fund, and also make grants to benefit organizations dedicated to local distressed animal care such as spay/neuter clinics and other community animal care and rescue. The donor has named the Homer Foundation as the recipient of their home, and the proceeds from the sale of that home will be the seed money used to establish this permanent fund for the community.

### HOMER RECREATION/COMMUNITY CENTER BETTERMENT FUND

Kathy Hill has established a fund with an eye to the future. Her wish to see the greater Homer community build a recreation and community center motivated her to start a new fund which will utilize a future planned gift from her estate to pay for enhancements or “betterments” in the construction and equipping of a new community/recreation center in the City of Homer. The fund is intended to enhance the facility and be used for the cost difference for “betterments” to finishes, fixtures, furniture, and equipment which would reasonably be purchased for a long-term public use facility. The idea of this fund is to make “next level” purchases and enhancements which, through the upgrade, take the facility from average to special.

– HF STAFF



# 2023 DONORS

## IN KIND

Bear Creek Winery  
Bill & Dorothy Fry  
Anonymous  
Amerikn Enterprises LLC  
Fiddlehead Creative  
Tonsina, LLC  
Foster & Company

## TOWERING SPRUCE (5000+)

Alaska Community Foundation  
Anonymous  
Arches Alaska  
Bill & Dorothy Fry  
Cameale Johnson  
City of Homer  
Helms Foundation  
John P. Fry  
Karin Marks  
Kathy & Roger Herrnstein  
KBBi Kachemak Bay Broadcasting Inc.  
Ken Castner & Nancy Lord  
Kenai Watershed Forum  
Konrad Schaad & Gabby Husmann  
Lara McGinnis  
M.J. Murdock Charitable Trust  
Margarete Keicher  
Martha Ellen Anderson  
Paul & Tina Seaton  
Robert & Melon Purcell  
Steve & Vicki Albert  
Wythe Family

## STURDY BIRCH (1000-4999)

100 Women Who Care - Homer  
*In Memory of Jim Meesis*  
Angie & Chris Newby  
Anna Lane, LLC  
Anonymous (6)  
Arlene Ronda  
Bill Palmer & Shirley Fedora  
Bride & Jason Seifert  
Buck & Shelly Laukitis  
Catherine & Michael McCarthy  
Cheryl & Mike Illg  
City of Kachemak  
Dartmouth College  
Dave Berry  
Denice & Roger Clyne  
Denise & Gordon Pitzman  
Donna Martin  
Doug & Landa Baily  
Doug Smith  
Douglas & Michelle Waclawski  
Eleanor Andrews  
Esther & Tabor Ashment  
Fireweed Meadows LLC  
Flo Larson  
Gary & Evelyn Waltenbaugh  
Geo Mandes & Charlie Martin  
Grace Ridge Brewing LLC  
Haas and Spigelmyer, Inc.  
Homer Brewing Co.  
Hubert & Janet Gellert  
Jackie Norvell  
Jo & Peter Michalski

## STURDY BIRCH continued

Joe & Joan Mello  
Julie Derry  
Karen & Bill Wuestenfeld  
Ken & Chow Taylor  
Liz & Ron Downing  
Lori & Tom Zitzmann  
Lorne Kligerman  
Mary & Donald Sanders  
Mary Frische & Tom Collopy  
Matt & Rebecca Clarke  
Michael Mullan & Virginia Howard Mullan  
*In Memory of Julia Park Howard & Paul Ward Howard*  
Michelle Ireland and Mitch Wegner  
Nelson & Lilia Co  
Ole Andersson & Jinky Handy  
Paula & Joe Martin  
Parmigan Arts  
Cooperative Corporation  
Red Knot Real Estate  
Robin Ridder  
Ryan Smith  
South Peninsula Hospital  
Medical Staff  
Storyknife Writers Retreat  
Susan Oesting  
Susannah Webster  
Ulmer's Drug & Hardware  
Van & Katelyn Hawkins-Wythe  
Widgeon Point Charitable Foundation

## WILD FIREWEED (250-999)

Aaron Bartel  
Alexandra McGuan  
Amerikn Enterprises LLC  
Amy Velsko  
Annie Allman  
Anonymous  
Arches Alaska  
Berkshire Hathaway  
Home Services Alaska Realty  
Bernard Griffard  
Betsy & David Lawer  
Bill Bell & Mary Lou Kelsey  
Bobby & Sharon Wilson  
Bobby Copeland & Michael McKinney  
Bonnie Jason & David Schneider  
Brenda & James Dolma  
Brenda Adams  
Brian Harrison & Suzanne Haines  
Carol Swartz & Bob Cole  
Carrie Bishop  
Coops Coffee  
Curt & Lorna Olson  
Daniel B. Weatherly  
Darius Baltz  
Dave & Beth Schroer  
Dave Ritche & Angela Brock  
Deb Leisek & Jim Long  
Debbie & Jack Oudiz  
Diane Kaplan  
Dirt Junkie Landscaping  
Dottie & Rick Foster  
Dr. Kristina Lacy  
Earl Marion Hill

## WILD FIREWEED continued

Elaine Burgess  
Emmitt & Mary Trimble  
Frances L. Haas  
Gina Pelaia  
Giving Salmon  
Greg Favretto  
Hayne Ellis & Linda Whitlach  
Helyn Schoepke  
Jana Hayenga  
Janie Leask & Don Reed  
Jena Frawner  
Jennifer Bando  
Jessica Moore  
Jim Cehula & Myra Wilson  
John & Jackie Minge  
Joleen Brooks  
Jonathan & Stephanie Hamilton  
Kachemak Bay Wilderness Lodge  
Karen Weston  
Kathryn Carsow  
Kathy & Maynard Smith  
Kim Marrale  
Lavrentii Reutov  
Lawrence & Gail Radcliffe  
Lee & Sandy McDaniel  
Luned Botland  
Marcos & Sondra Reyes  
Mark Skibinski  
Märta Todd-Hashagen  
Maureen Kennedy  
Merlin & Carol Cordes  
*In Memory of Chris Etwiler*  
Mike Miller & Robin Albright  
Mildred M. Martin  
Monica & Patrick Mede  
Morgan Christen & James Torgerson  
Nancy Schrag  
National Philanthropic Trust  
Paul Allan & Louise Ashmun  
Peter Barclay  
Peter Crimp & Paula Cullenberg  
Philemon Morris  
Preventive Dental Services  
Redline LLC  
Regina Davis  
Rich & Helen Gustafson  
Robert Miklos  
Robert Weaver  
Sandy St George  
Scott Meyer  
Shirley & David Sanders  
Stan Eller  
Steve & Noko Yoshida  
Summit Physical Therapy  
Susan Drathman  
Sydney Thielke  
Todd Family Fund at Renaissance  
Charitable Foundation  
Veronica Slajer  
*In Memory of Judi Slajer*  
Wendi Yohman  
William Donohue  
William Walton  
Yvonne Leutwyler

## ESSENTIAL SEEDLINGS (1-249)

Abigail Morris  
*In Honor of Phil Morris*  
Alan Martin  
Alex & Cindy Koplin  
Alice Porter  
Alicia Amberg  
Amy Holman  
Angela Hinnegan  
Anne Marie Moylan  
Ann and John Anderson  
Ann Oberlitner  
Anonymous (10)  
Anthony Resetarits  
Aron Peterson  
Barbara Leichtung  
Bernadette Arsenault  
Bonnie Powell & Blake Larue  
Brandy McGee  
Brenda & James Dolma  
Bryan Hawkins  
Caleen Cox  
Casey Siekaniec  
Charles Landmesser  
Chelsea Carpenter  
Cheryl Denise Atkins-Rickett  
Christie & Ty Gates  
Christina Demetro & Eric Mouffe  
Christine & Deland Anderson  
Christine Caffee  
*In Honor of Claudia & Frank Caffee-DeLapp*  
Ciara Lambert  
Claudia Haines & Steve Glasman  
Clinic of Chiropractic Health  
Connie and Kerry Ozer  
*In Honor of Peter & Jo Michalski*  
Cynthia Baganov  
Dakotah Larson  
Dale & Dianne Spence-Chorman  
Dale Chorman  
Daphane Maxon  
David & Christianne Caffee Fund  
David Downey & Devry Garity  
David Lewis & Lyn Maslow  
Dean Epperson  
Diane Borgman  
Dolores & Bill Butler  
Donna C Brooks  
Dorothy "Duffy" Clarke  
Dr. Paul Sayer  
Ed & Sara Berg  
Elizabeth Schaffhauser  
Elizabeth Trowbridge  
Emilie & Edward Otis  
Frances Haas  
Francie Roberts  
Ginnie Oliver  
Giulia Tortora  
Hal Smith & Susan McLane  
Heidi Stage  
IBM Employees Service Center  
Jacques & Mary Regat  
Jakob Richter  
James & Teresa Calhoun  
Jane Bunca  
Jane Miles & Lolita Brache  
Janet Fink  
Janna Christen  
*In Honor of Dick Dunn*  
Jennifer Watson  
Jenny Carroll & Paul Dungan  
Jerry Scholand & Lou Detwiler  
Jim & Ruth Lavrakas

## ESSENTIAL SEEDLINGS continued

JoAnne Giza & Charles Gizatte  
Joe & Connie Isenhour  
Joe Miles  
*In Honor of David Schneider*  
John Munns  
Judy Gonsalves & Daniel Layland  
Justin Johnson  
Kachemak Bay Watercolor Society  
Karen Northrop & Doug Reid  
Karson & Leobof Dorvall  
Kathleen A Finn  
Kathryn Thompson  
Katie Gamble  
Katie Gavenus  
Katlyn Oberholtzer  
Ken Landfield & Sue Wohlgemuth  
Larry Peppers  
Lee Hartman  
Lisa & Robert Fellows  
Lloyd & Ulyana Stiassny  
Lora Wilke  
Louise Ashmun & Paul Allen  
Lynda & Howard Reed  
Lynne Burt  
Marcia Kuszmaul & Mannfried Funk  
Margaret Lau  
Mari-Anne & Maynard Gross  
Marion Kinter & Gerard Garland  
Mark Robinson & Nancy Lander  
Mary Ann Harding  
Mary Boone  
Michael Gracz  
Monte & Tamara Budahl  
Nature's Way Rehab. Services  
Neil & Teresa Ferguson  
*In Memory of Kevin Bell*  
Paul Medency  
Paula Tretkoff  
Pegge Erkeneff  
Peggy Ellen & Rich Kleinleder  
Peter Garay  
Ralph Broshes & Deb Lowney  
*In Memory of Chris Etwiler*  
Ray & Dianne Brown  
Rena Carlson  
Robert & Linney Borland  
Roberta Highland & Robert Archibald  
Robin H. Cederlof  
Rosie Serebrekoff  
Roy Wilson  
Royce Page  
Scott & Sharon Bauer  
Shirley Forquer  
SPH Rehab Dept  
Stanley Pike  
Stephanie Huber  
*In Memory of Chris Etwiler*  
Stephanie Silianoff  
Steve Schroeder  
Sue Mauger  
Sue Post & Jim Levine  
*In Memory of Gary Thomas*  
Susanne Ratcliffe Wilson  
Teena Garay  
Thomas & Sonja Nelson  
Thomas Williams  
*In Honor of Dave & Beth Schroer*  
Tiffany Mayasich  
Tom Kizzia  
Torie Gutschow  
Tracie & Eric Brown  
Wayne & Donna Aderhold

GRANT HIGHLIGHT

# SPARC



## A NEW FLOOR FOR THE SPARC!

The SPARC was built in 2016–17 by the Soccer Association of Homer (the non-profit now named South Peninsula Athletic and Recreational Committee). Community members Daniel and Lisa Zatz jump started the project with generous donations of their time and treasure. Their vision and philanthropy leveraged a broad array of additional donations, including a matching grant from the City of Homer and over \$200,000 from the Homer Foundation.

Today the SPARC is a cherished space for all kinds of activities and gatherings. Since we opened our doors in late 2017, over 6,261 unique visitors have made over 46,000 visits to our facility. Rental events bring in many other visitors, with an average of 17 rentals a month, from birthday parties to contra dances.

The SPARC was originally outfitted with used flooring consisting of interlocking plastic tiles laid over crushed gravel and sand. We always planned to upgrade the floor, when possible, as it has developed subtle rises, dips, and dead spots that interfere with participant safety, optimal play, cleanliness, and durability.

In 2021 we began our capital campaign to replace the old flooring with modern athletic flooring adhered to a concrete slab. Thanks in great part to a \$25,000 grant from the Opportunity Fund of the Homer Foundation, we successfully raised a local match to leverage a \$239,400 grant from the Murdock Charitable Trust. The new floor construction is happening summer 2023. We can't wait to show it off to the community fall 2023!

**GINNY ESPENSHADE** SPARC BOARD VICE PRESIDENT

# COMMUNITY GRANTS





**ARTS & CULTURE \$30,500**

**COTTONWOOD FUND**  
Homer Council on the Arts ..... \$1,000  
*Dancing through Wonderland*

**GIRL SCOUT TRAVEL FUND, HORN SECTION, & OPPORTUNITY FUND**  
Homer OPUS ..... \$5,000  
*Full Time Educator Year 3*

**MARTHA H. BRISCOE ENVIRONMENTAL SCIENCE AND CONSERVATION FUND & KLEPS FUND**  
Pratt Museum ..... \$4,500  
*Salmon Culture*

**OPPORTUNITY FUND**  
Homer OPUS ..... \$5,000  
*Capacity Building*  
Bunnell Street Arts Center ..... \$5,000  
*Homer's HEART Residencies*  
Pier One Theatre ..... \$5,000  
*Summer Theatre Program*  
Pratt Museum ..... \$5,000  
*Summer Programs at the Pratt*

**COMMUNITY DEVELOPMENT \$12,413**

**SPAY AND NEUTER FUND & CONSTANCE BENSTON FUND**  
Homer Animal Friends ..... \$913  
*Deferred Spay & Neuter Clinic*

**OPPORTUNITY FUND**  
South Peninsula Hospital Foundation ..... \$1,500  
*Homer Housing Public Feedback Forum*  
Kenai Peninsula Fair Association ..... \$10,000  
*Facility Sound Upgrade*

**CONSERVATION & ENVIRONMENT \$14,352**

**KATHY AND ROGER HERRNSTEEN FUND**  
Center for Alaskan Coastal Studies ..... \$600  
*Signs for Wynn Nature Center*

**OPPORTUNITY FUND & THE MAY B. BENSON CHARITABLE FUND**  
Friends of Kachemak Bay State Park ..... \$2,000  
*Kids Across the Bay*

**OPPORTUNITY FUND**  
Friends of Kachemak Bay State Park ..... \$1,762  
*Diamond Creek Yurt Platform*

**WILLOW FUND**  
North Gulf Oceanic Society ..... \$4,990  
*Understanding Harbor Porpoises in Kachemak Bay*

**OPPORTUNITY FUND & MARTHA H. BRISCOE ENVIRONMENTAL SCIENCE & CONSERVATION FUND**  
Homer Trails Alliance ..... \$5,000  
*Homestead Trail, mud to wood*

**EDUCATION \$18,000**

**DAVID AND MARY SCHROER FUND**  
Homer High School ..... \$3,000  
*Homer High School Positive Behavior Supports*  
Paul Banks Elementary ..... \$3,000  
*Library Updates*  
West Homer Elementary ..... \$3,000  
*Band Program*  
McNeil Canyon Elementary ..... \$3,000  
*Student Enrichment Opportunities*  
David and Mary Schroer Fund & Homer Incentive Fund  
Homer Flex School ..... \$2,000  
*Artist in the Schools*

**OPPORTUNITY GRANTS RESERVE & JULIE BOOTH ULMER MEMORIAL FUND**  
Chapman School ..... \$4,000  
*Maker Shop*

**GENERAL OPERATING SUPPORT \$46,987**

**CITY OF HOMER FUND**  
*2023 City of Homer Grant Program*  
Bunnell Street Arts Center ..... \$2,000  
Center For Alaskan Coastal Studies ..... \$2,000  
Kachemak Bay Family Planning Clinic ..... \$2,000  
Sprout ..... \$2,750  
Homer Farmers Market ..... \$3,000  
Homer Hockey Association ..... \$3,000  
Hospice Of Homer ..... \$3,000  
KBBI ..... \$3,000  
Homer Community Food Pantry ... \$3,500  
Homer Council On The Arts ..... \$3,500  
Kachemak Nordic Ski Club ..... \$3,500  
Cook Inletkeeper ..... \$1,500  
Kachemak Heritage Land Trust .... \$1,500

**HOMER COUNCIL ON THE ARTS AGENCY ENDOWMENT FUND**  
Homer Council on the Arts ..... \$404  
*Agency Endowment Annual Distribution*

**BUNNELL STREET ARTS CENTER AGENCY ENDOWMENT FUND**  
Bunnell Street Arts Center ..... \$433  
*Agency Endowment Annual Distribution*

**HOMER ANIMAL FRIENDS AGENCY ENDOWMENT FUND**  
Homer Animal Friends ..... \$604  
*Agency Endowment Annual Distribution*

**HOMER MARINER SOFTBALL AGENCY ENDOWMENT FUND**  
Homer Mariner Softball ..... \$904  
*Agency Endowment Annual Distribution*

**HOMER COMMUNITY FOOD PANTRY AGENCY ENDOWMENT FUND**  
Homer Community Food Pantry ... \$975  
*Agency Endowment Annual Distribution*

**KACHEMAK HERITAGE LAND TRUST AGENCY ENDOWMENT FUND**  
Kachemak Heritage Land Trust ... \$1,245  
*Agency Endowment Annual Distribution*

*General Operating Support Continued*

**PRATT MUSEUM AGENCY ENDOWMENT FUND**  
Pratt Museum ..... \$1,284  
*Agency Endowment Annual Distribution*

**KBBI AGENCY ENDOWMENT FUND**  
KBBI ..... \$1,611  
*Agency Endowment Annual Distribution*

**PETER LARSON COMPASSION IN ACTION HOSPICE OF HOMER AGENCY ENDOWMENT FUND**  
Hospice of Homer ..... \$1,777  
*Agency Endowment Annual Distribution*

**DAVID AND MARY SCHROER FUND**  
KBBI ..... \$2,000  
*General Operating Support*

**OPPORTUNITY FUND**  
*People's Choice Award*  
Homer Council on the Arts ..... \$500  
Hospice of Homer ..... \$500  
Kachemak Ski Club ..... \$500

**HEALTH & SOCIAL SERVICES \$57,402**

**HOMER KACHEMAK BAY ROTARY CLUB FUND**  
Homer Kachemak Bay Rotary Club ..... \$2,000  
*Flu Vaccinations at Rotary Health Fair*

**DAVID AND MARY SCHROER FUND**  
Homer Community Food Pantry ... \$1,000  
*Food*

**OPPORTUNITY FUND**  
Homer Community Food Pantry ... \$4,936  
*Food for Young Families*

**COMMUNITY CHEST FUND**  
Homer Community Food Pantry ..... \$22,650  
*Emergency Non-Food Aide*

**WILLOW FUND**  
Homer Farmers Market ..... \$5,000  
*Homer Community Food Locker*

**OPPORTUNITY FUND**  
City of Seldovia ..... \$5,000  
*Senior Meals Program*  
Kachemak Bay Recovery Coalition. \$4,800  
*Sober Events*  
American Red Cross ..... \$2,016  
*Sound the Alarm*

**OPPORTUNITY FUND & DAVID AND MARY SCHROER FUND**  
KBBI ..... \$5,000  
*Transmitter Solar*

**OPPORTUNITY FUND & JANE LITTLE FAMILY ENDOWMENT FUND**  
Hospice of Homer ..... \$5,000  
*Volunteerism and Services Awareness Campaign*

**SPORTS & RECREATION \$41,000**

**DAVID AND MARY SCHROER FUND**  
Homer Booster Club ..... \$1,000  
*Team Travel*  
Homer Mariner Softball ..... \$500  
*Equipment and Training Enhancement*

**OPPORTUNITY FUND & JANE LITTLE FAMILY ENDOWMENT**  
Kachemak Running Club ..... \$1,500  
*SPARC Running Camp*

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

**OPPORTUNITY FUND**  
South Peninsula Hospital ..... \$1,000  
*Homer Steps-Up*

**OPPORTUNITY FUND, KLEPS FUND, & COTTONWOOD FUND**  
SPARC ..... \$36,000  
*New Flooring*

**YOUTH PROGRAMS \$36,586**

**BLUEGRASS FUND & OPPORTUNITY FUND**  
Seldovia Community Preschool ... \$5,000  
*Tuition Assistance Program*

**GIRL SCOUT TRAVEL FUND**  
Girl Scouts of Alaska ..... \$1,000  
*Troop Travel to Kodiak*  
Girl Scouts of Alaska ..... \$1,124  
*Troop Travel to Encampment*  
Girl Scouts of Alaska ..... \$630  
*Recruit & Register 2023*  
Girl Scouts of Alaska ..... \$4,400  
*Troop Travel to Peterson Bay*

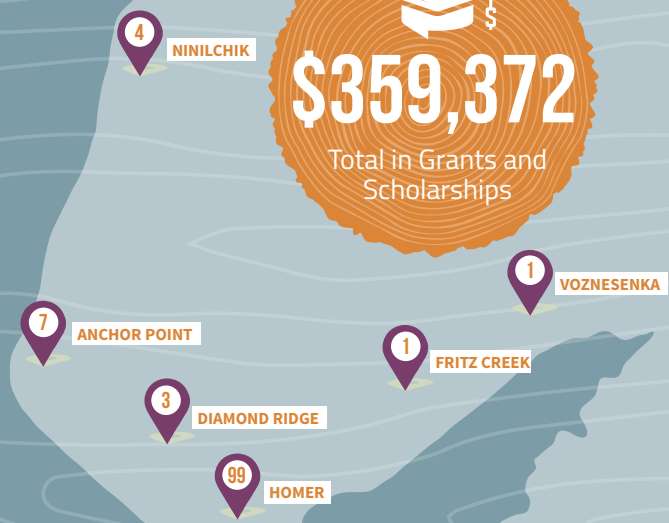
**KLEPS FUND & OPPORTUNITY FUND**  
Center for Alaskan Coastal Studies: Tiny Trees ..... \$5,000  
*Childcare License*

**OPPORTUNITY FUND**  
Civil Air Patrol ..... \$1,577  
*STEM Kits*  
HoWL ..... \$2,865  
*HoWL DEI initiatives*  
Friends of Homer Public Library ... \$4,990  
*Summer Reading Program*

**YAC FUND**  
Ninilchik Saturday Lunch Program .. \$800  
*Kitchen and Sewing Equipment*  
Kachemak Ski Club ..... \$2,000  
*Improved Skier Experience*  
HoWL ..... \$600  
*Adaptive Climbing Equipment*  
Homer Trails Alliance ..... \$2,000  
*Rogers Loop Trail Maintenance*  
Kachemak Heritage Land Trust ... \$2,600  
*Tending to KHLT Homer Trails*  
Homer Council on the Arts ..... \$2,000  
*Folk Arts Music Camp 2023*

# REASONS TO PARTNER WITH HOMER FOUNDATION

## AREA-WIDE GRANT IMPACT



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

### 1 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.

### 2 TRUST & ACCOUNTABILITY

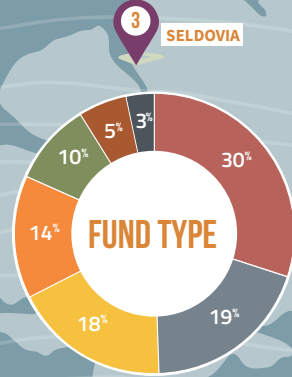
We provide wise stewardship of the gifts entrusted to us in two ways: 1) through professional investment management, and 2) in the strategic grants we make for the southern Kenai Peninsula. The Homer Foundation is accountable to our donors, our Board, and our community; and constantly strives to create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

### 3 HIGHLY PERSONALIZED & FLEXIBLE SERVICE

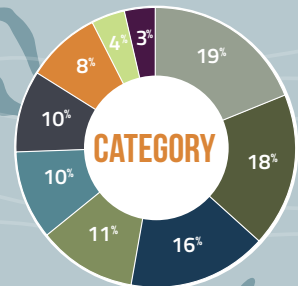
The Homer Foundation is exceptionally flexible and adaptable. We are available to help guide donors in formulating and fulfilling their philanthropic goals. We accept a wide variety of assets, even the most complex forms.

### 4 HOLISTIC COMMUNITY FOCUS

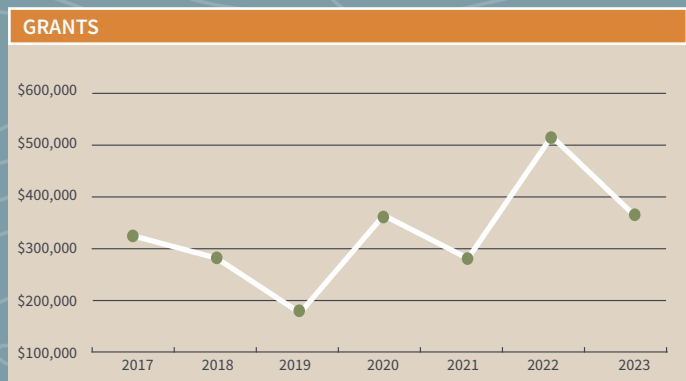
We connect donors to opportunities across our region in a variety of charitable categories such as basic human needs, the arts, education, youth services, the environment, and more. Where do you want to be? That's where we are.



| GRANTS BY FUND TYPE |           |
|---------------------|-----------|
| Opportunity         | \$108,616 |
| Donor Advised       | \$69,244  |
| Other               | \$65,653  |
| Scholarships        | \$50,000  |
| Fiscal Sponsorship  | \$34,516  |
| Community Chest     | \$19,700  |
| Field of Interest   | \$11,644  |



| GRANTS BY CATEGORY         |          |
|----------------------------|----------|
| Education & Scholarships   | \$68,000 |
| General Operating Support  | \$64,604 |
| Health & Social Services   | \$57,402 |
| Sports & Recreation        | \$41,000 |
| Youth Programs             | \$36,586 |
| Fiscal Sponsorships        | \$34,516 |
| Arts & Culture             | \$30,500 |
| Conservation & Environment | \$14,352 |
| Community Development      | \$12,413 |



GRANT HIGHLIGHT

# KENAI PENINSULA FAIR ASSOCIATION



## COMMUNITY INFRASTRUCTURE

In 2022, the Homer Foundation generously awarded a \$10,000 grant to the Kenai Peninsula Fair to support communication infrastructure on the grounds. The need for this upgrade was most poignantly illustrated by a situation in which an elderly fair goer with early onset Alzheimer's decided to walk home on her own and none of us knew where to find her. Her family, of course, was frantic. Our inability to announce this emergency across the fairgrounds made it very apparent that we needed to improve

immediately. With the help of the Homer Foundation, we now have the ability to put out an announcement all the way across the grounds – from the office to the rodeo arena. Secondly, the upgrade also enabled us to provide a microphone that connects to speakers in the ceiling and makes it much easier to address a large group. This improvement will make us more sought after as a meeting venue. We are so thankful to the Homer Foundation for making these upgrades possible.

**LARA MCGINNIS** FAIR COORDINATOR - KENAI PENINSULA FAIR ASSOCIATION

# 2023 SCHOLARSHIP AWARDS

# \$50,000 AWARDED TO AREA STUDENTS

This year the Homer Foundation has awarded 23 scholarships totaling \$50,000 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 349 individual scholarships totaling \$463,997.

“These scholarships have value well beyond the monetary. Each one sends an important message to its recipient and their family: ‘You have a future and your community believes in you,’” said Homer Foundation Executive Director Mike Miller.

The success of the Foundation’s scholarship program depends on our school counselors and other front-line staff connecting students to scholarship applications. It also depends upon the dozens of volunteers who make up our scholarship committees sharing their time and expertise to review applications, assuring an equitable selection process.

This year, we had a large jump in applicants, with 76 completed applications. This made the process more competitive and gave the committees many great options in their tough decision-making 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 South Peninsula youth far into the future. Tax-exempt donations to support these scholarships, or any of the 85 funds managed by the Foundation, are appreciated and put to work improving the quality of life in our communities.



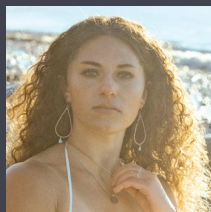
HEIDI STAGE  
Health Care Providers Scholarship



**BRISTOL JOHNSON**  
Beluga Tail Non-Fiction  
Writing Homer Community  
Science



**DOMNIKA KUZMIN**  
Diane Wambach “Shoot for the Stars”



**ALANA HOULIHAN**  
Health Care Providers  
Scholarship Nursing Studies



**LAURA INAMA**  
Health Care Providers  
Scholarship



**XANDER KULHANEK**  
Drew Scalzi Memorial  
Maritime



**CODY BLOSSOM**  
Kachemak Medical Group

# CONGRATS TO ALL OF OUR 2023 SCHOLARSHIP RECIPIENTS!



## ERYN FIELD

Eryn is attending Jacksonville University to study marine science and biology. She is the recipient of \$11,000 in awards with the Mary Joyce Robinette Memorial, the Homer Community Science, and the Fish & Wildlife Scholarships. Field expressed what these awards mean to her by saying, “Science and biology have always been a huge part of my life and I am beyond excited to study Marine Science and Biology in pursuit of a bachelor’s degree. I hope to eventually turn this into a master’s degree as well. This scholarship that I was awarded has such a large impact on my ability to follow these dreams as my financial situation was my top concern when starting the college process.”



## CECILIA FITZPATRICK

Cecilia is attending Montana State University to study wildlife or fisheries biology or management. She is the recipient of \$7,000 in awards with the Nikki Geragotelis (Fry) Memorial Scholarship. Reflecting on why she applied for this scholarship, Cecilia stated, “Looking through the qualities Nikki portrayed, I found I valued and strived to achieve the same ones she did. As I go forward to Montana State University, I will continue to do my best representing what Nikki stood for.”



## ZACH MARLEY

Zach is attending Colorado School of Mines to study Engineering Physics & Aerospace Engineering. He is the recipient of \$3,000 in awards with the Beluga Tale Fiction Writing Scholarship. His testimony to the impact that a scholarship can have is memorable: “I wonder sometimes, if my dreams, goals, and past accomplishments mean anything to anyone. Furthermore, I wonder if the path and goals I’m pursuing are attainable to begin with, coming from a small town in rural Alaska. Gestures of support from organizations such as yours affirm to me that the course I’ve charted for my future is true, and I will one day succeed at what I set out to do. So, thank you, truly: for the support, for the generosity, and for the recognition.”

### PTARMIGAN ARTS

Leah Dunn ..... \$ 1,750  
Amber Gilbreath .... \$ 1,750

### SUTTON JAMES MILLER MEMORIAL

Leah Evans..... \$ 1,000

### MARY JOYCE ROBINETTE MEMORIAL

Eryn Field ..... \$ 8,000

### NIKKI GERAGOTELIS (FRY) MEMORIAL

Cecilia Fitzpatrick.. \$ 7,000

### BELUGA TALE FICTION WRITING

Zach Marley ..... \$ 3,000  
Bristol Johnson ..... \$ 3,000

### DIANE WAMBACH

#### “SHOOT FOR THE STARS”

Domnika Kuzmin ... \$ 1,000

### HEALTH CARE PROVIDERS SCHOLARSHIP

Courtney Stage..... \$ 2,000  
Alana Houlihan..... \$ 2,000  
Laura Inama..... \$ 3,000

### DREW SCALZI MEMORIAL MARITIME

Xander Kulhanek ... \$ 1,000  
Cody Blossom ..... \$ 1,000  
Hannah Stonorov ... \$ 1,000

### MARILYN WYTHE BELIEVE IN YOURSELF

Chloe Gall ..... \$ 1,000

### HOMER COMMUNITY SCIENCE

Bristol Johnson ..... \$ 1,000  
Eryn Field ..... \$ 1,000  
Seamus McDonough . \$ 1,000

### FISH AND WILDLIFE

Eryn Field ..... \$ 2,000

### BILL AND LIZ JOHNSON TEACHER EDUCATION

Alyssum Veldstra ... \$ 1,000

### KACHEMAK MEDICAL GROUP

Cody Blossom ..... \$ 2,000

### ALAIN AND DANIEL RIESER

Leah Evans..... \$ 3,000

### NURSING STUDIES

Alana Houlihan..... \$ 1,500



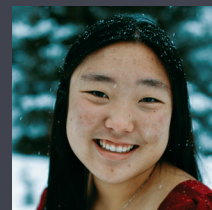
**HANNAH STONOROV**  
Drew Scalzi Memorial  
Maritime



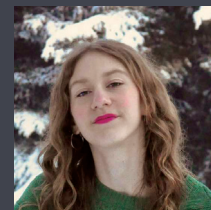
**CHLOE GALL**  
Marilyn Wythe  
Believe in Yourself



**SEAMUS MCDONOUGH**  
Homer Community Science



**ALYSSUM VELDSTRA**  
Bill and Liz Johnson  
Teacher Education



**LEAH EVANS**  
Sutton James Miller Memorial  
Alain and Daniel Rieser



# YAC

## THE YOUTH ADVISORY COMMITTEE (YAC)

is an award-winning youth-to-youth philanthropy program of the Homer Foundation and has successfully completed its second year partnering with Homer High School.

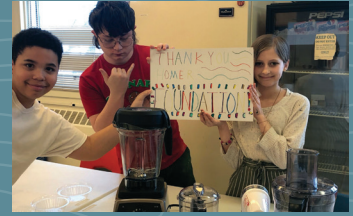
Homer High School leadership and staff were very supportive of this program in their space. Participants learned about how philanthropy addresses communities and earned community service hours for participating.

Funding for this year's YAC grants was a repeat of last year's 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 the Ashley Logan Fund, Sheldon Youth to Youth Fund, David and Mary Schroer Fund, and donors who have a passion for developing a philanthropic mind set in young people. We are deeply thankful to those donors who make the YAC grants possible.

The YAC has a strong youth voice philosophy and determines its own program goals for its grant cycle. The group decided our community's biggest needs were enrichment, skill-based, or active opportunities for area youth, with an additional focus on ages 10-14. When reviewing the applications, the students reflected upon their desired values of supporting the importance of trail maintenance in the area.

This year the following awards were recommended by the YAC:

|   |  |
|---|--|
| <b>Homer Council on the Arts</b>          | <b>\$2,000</b> for Fold Arts Music Camp 2023                         |
| <b>Homer Trails Alliance</b>              | <b>\$2,000</b> for trail maintenance on the Rogers Loop Trail system |
| <b>Homer Wilderness Leaders</b> (HoWL)    | <b>\$600</b> for adaptive climbing equipment                         |
| <b>Kachemak Heritage Land Trust</b>       | <b>\$2,600</b> for trail cameras and maintenance                     |
| <b>Kachemak Ski Club</b> (Homer Rope Tow) | <b>\$2,000</b> for Improved Skier Experience Project                 |
| <b>Niniilchik Saturday Lunch Program</b>  | <b>\$800</b> for new kitchen appliances and sewing equipment         |
| <b>TOTAL \$10,000</b>                     |  |



# THANKS

TO THE 2023 YAC MEMBERS

Liam Boss-Harmon, Ainsley Boss-Harmon, Eryn Field, Emma Early, and Mackenzie Hansen. A special thank you to staff member, Mrs. Sarah Boss and the HHS leadership team. We look forward to more youth philanthropy at Homer High School!

# FINANCIAL SUMMARY

The Year 2023 was one of growth for the Homer Foundation, based on over \$1 million in new donations and over \$500,000 in investment gains.

We are growing both in terms of monies in the endowed funds and in the non-endowed funds, and in the total number and types of funds. Our investment strategy of Vanguard management via long-term holding in broadly diversified, low-fee portfolios has been beneficial to weather the market declines of the past few years. The Finance Committee continues to regularly review investment performance and

our Vanguard managers, as well as to provide oversight on the Foundation's bookkeeping procedures. We are getting ready to migrate to a new accounting software system in 2024 which will provide a more streamlined tool for managing the growth. As Treasurer, I am proud of the hard work of the Homer Foundation staff and even more proud of being part of a community that donates towards charitable needs.

**PAULA MARTIN**  
TREASURER



## Revenue and Support

|                    |                    |
|--------------------|--------------------|
| Contributions      | \$ 1,021,553       |
| Net Earned Income  | \$ 83,334          |
| Investment Returns | \$500,033          |
| <b>TOTAL</b>       | <b>\$1,604,920</b> |

## Expenses

|                                 |                  |
|---------------------------------|------------------|
| Grants from Participating Funds | \$ 181,746       |
| Grants from Restricted Funds    | \$ 124,708       |
| Fiscal Sponsorships             | \$34,516         |
| Other Distributions             | \$ 105,174       |
| Personnel                       | \$ 158,724       |
| Operating and Program Expenses  | \$ 92,022        |
| <b>TOTAL</b>                    | <b>\$696,890</b> |

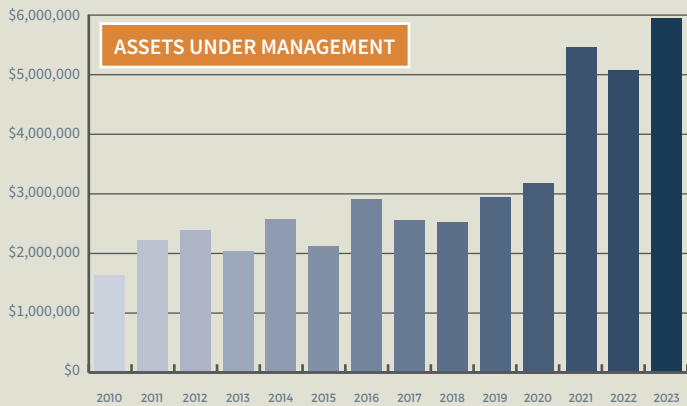
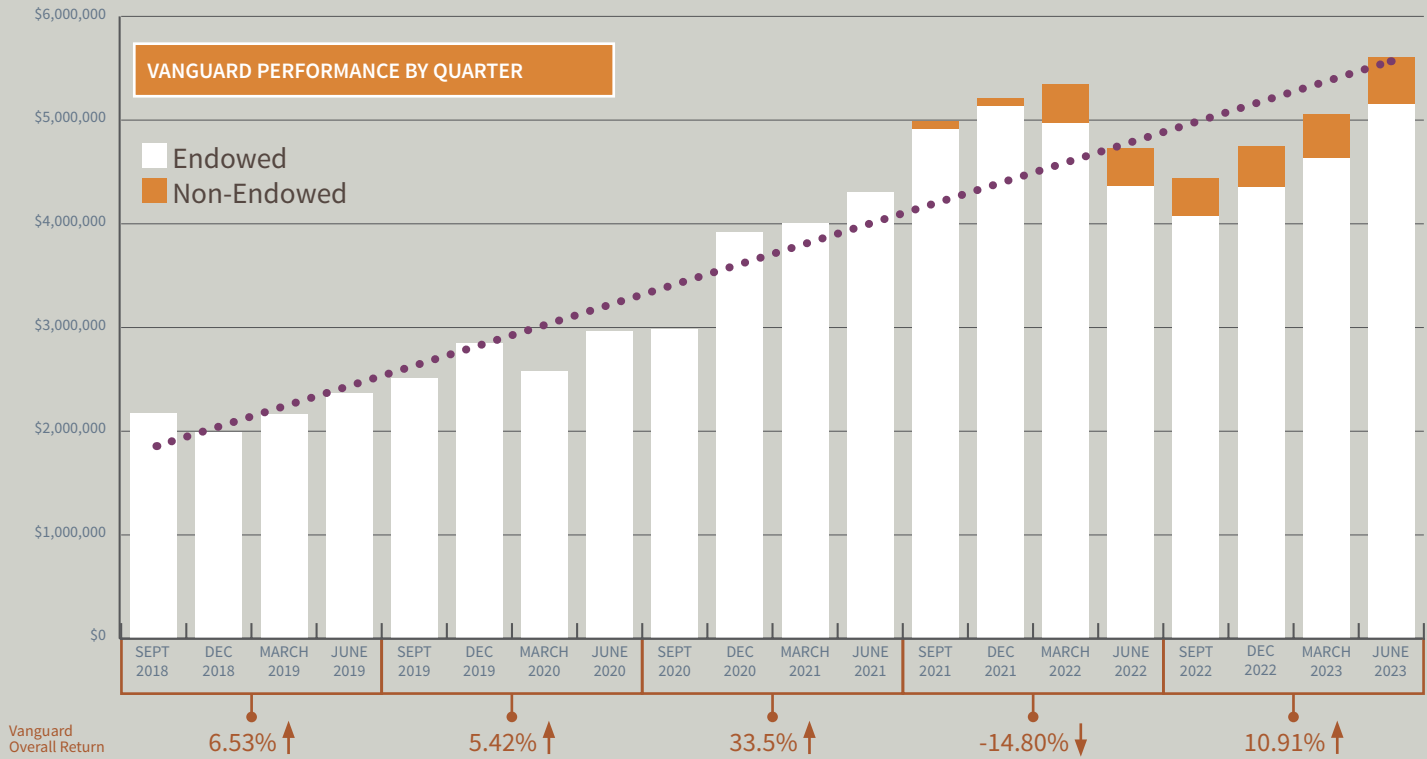
## Donated Goods and Services \$3,000

|                                |             |
|--------------------------------|-------------|
| Net Assets as of June 30, 2022 | \$4,671,686 |
| Increase in Net Assets         | \$908,029   |
| Net Assets as of June 30, 2023 | \$5,579,897 |

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.

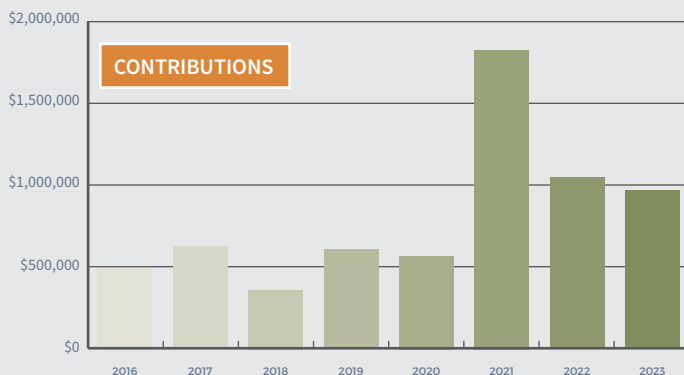
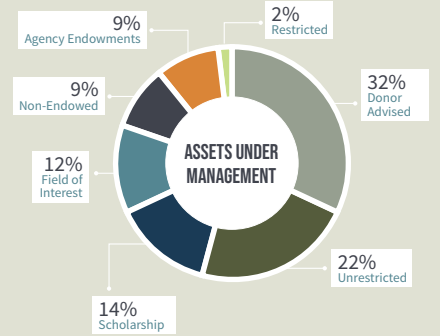
THE YEAR 2023 WAS ONE OF GROWTH FOR THE HOMER FOUNDATION

**FINANCIAL SUMMARY**



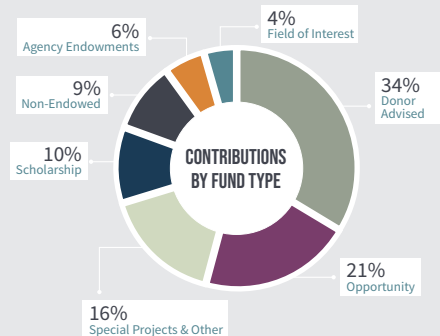
**MANAGED ASSETS BY FUND TYPE**

|                   |                    |
|-------------------|--------------------|
| Donor Advised     | \$1,883,777        |
| Unrestricted      | \$1,308,349        |
| Scholarship       | \$805,942          |
| Field of Interest | \$718,805          |
| Non-Ended         | \$527,104          |
| Agency Endowments | \$519,207          |
| Restricted        | \$101,893          |
| <b>TOTAL</b>      | <b>\$5,865,076</b> |



**CONTRIBUTIONS BY FUND TYPE**

|                            |                    |
|----------------------------|--------------------|
| Donor Advised              | \$344,685          |
| Opportunity                | \$209,465          |
| Special Projects and Other | \$163,887          |
| Scholarship                | \$106,076          |
| Non-Ended                  | \$96,975           |
| Agency Endowments          | \$56,352           |
| Field of Interest          | \$44,113           |
| <b>TOTAL</b>               | <b>\$1,021,553</b> |





# 2023 FAMILY OF FUNDS

## 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  
 Homer VFD Fire Investigation Training Fund  
 Hospice of Homer Agency Stewardship Fund  
 Kachemak Nordic Ski Club Stewardship Fund  
 Northside Trail Fund  
 Sheldon Purcell Fund  
 South Peninsula Hospital Foundation Fund

## 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  
 Cook Inletkeeper Climate Action 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

## 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*  
 JEMCO Fund  
*Supporting music for individuals*  
 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*  
 Ninilchik Community Fund  
*Supporting nonprofits serving the residents of Ninilchik*  
 Peony Gardens' Beautification Fund  
*Supporting Peony Gardens' Beautification Project within the commercial business district*  
 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 Pay & Neuter Clinics*

## 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

## UNRESTRICTED FUNDS

Homer Foundation Opportunity Fund  
 Julia Park Howard Unrestricted Fund  
 Steve and Noko Yoshida Fund  
 The Jenson Fund  
 Homer Foundation Operating 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  
 Marilyn Wythe Believe in Yourself Scholarship  
 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



# 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.


Contact the Staff at the Homer Foundation with any other questions. We are happy to help you with your IRA Rollover gift.

## 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



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

EIN: 92-0139183

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



2022 A HUGE SUCCESS

# HALIBUT COVE LIVE

Halibut Cove Live 2022 was a huge success! The event returned for the first time since 2018, and we had a wonderful weekend of events at Quiet Place Lodge on Friday and Saturday, July 15-16.



These special evenings of music, food and fun have been a key support for the Homer Foundation's grants, scholarships and operations since 2012. 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! Wow. This means we raised \$21,500 more than we had expected. We are grateful to Diane Kaplan, the Rasmuson Founda-

tion, and all of the donors for their generous support for 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. Again, we thank Paul and the donors who graciously gave to support local enrichment through The Homer Foundation.



# MANY THANKS

Thank you to our hosts **Harmon and Pauli Hall of Quiet Place Lodge**, to an amazing team of community volunteers (who helped serve, set up, tear down and more), and to the following businesses for all of the support this year!

- CHEF AARON APLING-GILMAN
- THE GROG SHOP
- HOMER BREWING
- THE SALTRY RESTAURANT
- ALASKA SHELLFISH FARMS
- SNOW WHITE LINEN SUPPLY
- ALASKA COASTAL MARINE

# 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.