Homer City Hall
491 E. Pioneer Avenue
Homer, Alaska 99603
www.cityofhomer-ak.gov

City of Homer
Agenda

Library Advisory Board Regular Meeting
Tuesday, February 2, 2021 at 5:30 PM
City Hall Cowles Council Chambers
Webinar ID: 991 8847 0047 Password: 125016
Dial: 346-248-7799 or 669-900-6833; (Toll Free) 888-788-0099 or 877-853-5247

CALL TO ORDER, 5:30 P.M.

APPROVAL OF AGENDA

PUBLIC COMMENTS REGARDING ITEMS ON THE AGENDA (3 minute time limit)

RECONSIDERATION

APPROVAL OF MINUTES

A. LAB December 1, 2020 Regular Meeting Minutes **Page 3**

VISITORS/PRESENTATIONS

STAFF & COUNCIL REPORT/COMMITTEE REPORTS

A. Library Director Reports dated December 31, 2020 and January 27, 2021 **Page 8**
   i. 2020 Statistical Report **Page 15**
   ii. 2021 Statistical Report *(laydown)*

PUBLIC HEARING

PENDING BUSINESS

A. Planned Giving Program – Planned Giving Joint Fundraising with FHL **Page 16**
   i. Advertising Materials Developed To-Date **Page 17**
   ii. Resolution 06-06 Adoption of LAB & FHL Memo of Understanding **Page 63**

NEW BUSINESS

A. Library Fines & Fees Policy – Charges for Printing & Photocopying **Page 71**
   i. Library Fines and Fees Schedule **Page 72**

INFORMATIONAL MATERIALS

A. Memo from City Clerk to City Advisory Bodies Re: Reports to Council **Page 74**

COMMENTS OF THE AUDIENCE (3 minute time limit)

COMMENTS OF THE STAFF

COMMENTS OF THE COUNCILMEMBER (if present)

COMMENTS OF THE CHAIR

COMMENTS OF THE BOARD

ADJOURNMENT

Next Regular Meeting is **TUESDAY, MARCH 2, 2021 at 5:30 P.M**. All meetings scheduled to be held via Zoom Webinar in the City Hall Cowles Council Chambers located at 491 E. Pioneer Avenue, Homer, Alaska.

Session 20-08, a Regular Meeting of the Library Advisory Board was called to order by Vice Chair Springer at 5:41 p.m. on December 1, 2020 at the City Hall Council Chambers located at 491 E. Pioneer Avenue, Homer, Alaska via Zoom webinar. Call to Order was delayed due to connectivity issues.

PRESENT: BOARDMEMBERS KUSZMAUL, FINN, PETERSON, FAIR, VERNON, SPRINGER, DOLMA STUDENT REPRESENTATIVE RENNER

STAFF: LIBRARY DIRECTOR BERRY
CITY CLERK TUSSEY

APPROVAL OF THE AGENDA

Vice Chair Springer asked for a motion to approve the agenda.

FAIR/DOLMA MOVED TO APPROVE THE AGENDA.

There was no discussion.

VOTE: NON OBJECTION: UNANIMOUS CONSENT.

Motion carried.

Due to connectivity and audio issues, Vice Chair Springer was not able to continue chairing the meeting and Chair Kuszmaul was not able to take over. Boardmember Peterson began conducting the meeting at 5:50 p.m.

PUBLIC COMMENT REGARDING ITEMS ON THE AGENDA

RECONSIDERATION

APPROVAL OF MINUTES

A. LAB November 3, 2020 Regular Meeting Minutes

Acting Chair Peterson asked for a motion to approve the minutes.

FAIR/FINN MOVED TO APPROVE THE NOVEMBER 3, 2020 REGULAR MEETING MINUTES.

There was no discussion.

VOTE: NON OBJECTION: UNANIMOUS CONSENT.

Motion carried.

VISITORS/PRESENTATIONS

STAFF & COUNCIL REPORT/COMMITTEE REPORTS

A. Library Director Report for November 24, 2020
   i. 2019 Statistical Report
   ii. 2020 Statistical Report (laydown)

Library Director Berry provided his staff report, speaking to and facilitating discussion on the following:

- The City moving into "Code Red" due to COVID-19; it means most staff are working in staggered shifts or from home. Continuity planning has it set up to where if things get worse they would have to cease all on-site services.
- Holiday efforts including status of the Giving Tree, recommendations for those who usually donate to instead reach out to other non-profits and donate directly to them, and lights being put up in the lounge area.
- Friends of the Homer Library are overhauling their website, have hired a marketing coordinator to help with encouraging donations to their organization.
- Parks, Art, Recreation, and Culture Advisory Commission is also looking to set up an endowment fund for the City's parks and recreation funds.
- Overview of statistics; increase in attended meetings, grants and donations received, and projects those funds are earmarked for.

PUBLIC HEARING

PENDING BUSINESS

A. Planned Giving Program Plan
   i. DRAFT Planned Giving Plan for Library Endowment Fund

Acting Chair Peterson introduced the item by reading the title and deferred to Boardmember Kuszmaul to initiate discussion.

Ms. Kuszmaul reviewed the Planned Giving plan she drafted and the tasks the LAB needs to accomplish to get it ready for launching. She spoke to and facilitated discussion with the board and staff on the tasks outlined in the plan while also considering who would be available to work on them.

- Identifying potential donors – Boardmember Finn agreed to compile a list.
- Developing a case statement explaining to those donors why they should donate – Mutual agreement to blend the Samuel Public Library's statement and Ms. Kuszmaul's and Mr. Berry's statement into one; Boardmember Fair agreed to write it.
- Setting growth targets for the endowment principal – Mutual agreement to discuss it further at the February meeting.
- Developing marketing materials – Mr. Berry agreed to work with Ms. Kuszmaul to prepare items.
- Reaching out to potential donors through various media – Ms. Peterson agreed to compile a list of local influencers and reach out to them.
- Launching the endowment campaign with a challenge grant.

Boardmember Springer left the meeting at 6:28 p.m. due to connectivity issues.

There was discussion on completing these tasks before the February meeting and to hold a worksession before the February regular meeting to bring it all together with a proposed launch date in the spring, possibly May. The board agreed to hold a worksession January 26, 2021 at 5:30 p.m. to discuss the Planned Giving Plan.

B. Planned Giving Program – Bookmark Design Contest
   i. Sample Bookmark Designs

Acting Chair Peterson introduced the item by reading the title and opened the floor for feedback on the sample bookmarks provided by Library Director Berry.

Discussion ensued on the photos used and if they would work due to permission allowances. Boardmembers voiced their support of the quotes used. It was clarified that the quote and photo would be on one side and the City logo and library information would be on the other side.

Student Representative Renner left the meeting at 7:06 p.m.

Mr. Berry commented that these designs were what he created to get started, and that Boardmember Vernon had proposed they hold a design contest for additional bookmarks. Mr. Vernon spoke to his proposal, how it supports local artists, and his willingness to donate funds for an award. Boardmembers shared and discussed ideas of partnering with school teachers and Homer Council on the Arts to garner contest participation.

VERNON/DOLMA MOVED TO HOLD A BOOKMARK DESIGN CONTEST WITH A $100 PRIZE THAT IS OPEN TO THE GENERAL PUBLIC AND PUT OUT THROUGH THE PUBLIC SCHOOLS, HOMER COUNCIL ON THE ARTS, AND BUNNELL STREET GALLERY, TO BE HELD BY APRIL 1, 2021.

Boardmember Finn inquired if there will there be other bookmarks coming out so there is greater variety. Boardmember Dolma suggested the $100 be allocated into staggered awards for three different designs.

Boardmember Kuzmaul asked for clarification on the need for a bookmark contest and what library staff was already recommended to order. Ms. Dolma responded, noting the provided sample bookmark is what Mr. Berry is ordering now to get into books by the beginning of the year, and the contest would provide additional bookmarks later on.

VOTE: NON OBJECTION: UNANIMOUS CONSENT.

Motion carried.

NEW BUSINESS

A. LAB Goals and Priorities for 2021

i. LAB Goals 2020 – Reviewed/Approved December 10, 2019

Acting Chair Peterson introduced the item by reading the title. She reviewed the previous goals listed in the packet materials.

Boardmember Kuszmaul read out the goals outlined in Library Director Berry's memo and her reasoning for why the board should support each goal. She explained how goals #2 and #4 are succinct with goals they worked on in 2020.

Mr. Berry spoke to Goal #3 and library staff's efforts to collaborate with local libraries to offer better services. These efforts came to a halt due to COVID, but there is still interest in setting up partnerships, such as with the Seldovia Library, to help individuals who live across the bay and don't have direct access to the library. Boardmember Dolma voiced her concerns with too much community interaction due to COVID and suggested it be a research goal for 2021 with more action taken in 2022.

Ms. Kuszmaul commented on how the outreach efforts was similar to the LAB previously collaborating with other library boards, and could be included with that goal.

KUSZMAUL/FINN ADOPT FOUR GOALS FOR 2021:

1. DEVELOP AND INITIATE PLANNED GIVING PROGRAM FOR THE LIBRARY
2. ADVOCATE FOR LIBRARY BUDGET
3. EXPLORE OPPORTUNITIES TO INCREASE LIBRARY CARD REGISTRATION AND USE BY STUDENTS
4. RESEARCH TO IMPROVE SERVICES TO REMOTE PARTS OF THE LIBRARY SERVICE AREA

Boardmember Finn commented on the library budget goal and how City Council has written letters of budget support in the past. She thinks they should watch the financial situation at the state and federal levels and advocate to Council if needed, and would be willing to provide updates at future meetings. At the request for clarification, Deputy City Clerk Tussey explained how agenda items are intended for actionable items and an appropriate place for budget updates would be under either reports or comments. Ms. Finn requested to include budget update as a running agenda item under reports. The board agreed.

VOTE: NON OBJECTION: UNANIMOUS CONSENT.

Motion carried.

INFORMATIONAL MATERIALS

A. LAB 2020 Calendar
B. LAB 2021 Calendar
C. Boardmember Attendance at 2020 City Council Meetings
D. Boardmember Attendance at 2021 City Council Meetings

Acting Chair Peterson reviewed the informational items provided. Boardmember Kuszmaul commented on the LAB calendar.

There was discussion on 2020/2021 City Council meeting schedule and who would be interested in attending to provide a report. Ms. Kuszmaul agreed to attend the December 14th meeting. Boardmember Finn agreed to attend the January 11, 2021 meeting.

COMMENTS OF THE AUDIENCE

COMMENTS OF THE CITY STAFF

Library Director Berry wished everyone a Merry Christmas.

Deputy City Clerk Tussey had no comments.

COMMENTS OF THE COUNCILMEMBER

COMMENTS OF THE CHAIR

Boardmember Kuszmaul thanked Boardmember Peterson for all her work on the Giving Tree and Deputy City Clerk Tussey for the orientation packet she compiled for new boardmembers. She requested that the content list be included in informational materials in the January packet. She asked Boardmember Dolma if the materials were helpful and to provide any feedback to herself or staff.

COMMENTS OF THE BOARD

Boardmember Finn commented on the Hundred Women Who Care event that had just taken place, and SPROUT's Imagination Library had received this year's award.

Acting Chair Peterson encouraged boardmembers to participate in the online Giving Tree program by going to the Homer Bookstore's website or giving them a call to purchase a certificate.

Boardmembers Fair, Dolma, and Vernon had no comments.

ADJOURN

There being no further business to come before the Board, the meeting adjourned at 7:45 p.m. The next regular meeting is Tuesday, February 2, 2021 at 5:30 p.m. and a worksession is scheduled Tuesday, January 26, 2021 at 5:30 p.m. All meetings scheduled to be held via Zoom webinar in the City Hall Cowles Council Chambers located at 491 E. Pioneer Avenue, Homer, Alaska.

_____
RACHEL TUSSEY, DEPUTY CITY CLERK

Approved:_____

Director's Report, Homer Public Library

December 31, 2020

General Notes

The library has remained at Code Red status (with curbside pickup and electronic services available, but no public building access) all the way through December, due to an ongoing spike in COVID-19 cases.

An anonymous donor offered up to match up to $10,000 for the library endowment fund, provided donations were made by the end of the year. As of Dec. 31, other donors had contributed $8,114.

The last hardware for the RFID conversion project arrived on New Year's Eve. The next steps will include setting up the hardware, completing installation of the software on the City's servers (which may require a server upgrade), and tagging the entire collection.

On a less cheerful note, a homeless patron has taken up near-permanent residence outside the library. Staff tried all sorts of charities and government agencies in the hope of finding him somewhere to go, but no options seem to be available.

Director's Meetings in December 2020					
Library Advisory Board (LAB)	Friends of Homer Library (FHL)	Staff	City Council	Department Heads	Other
2	3	5	1	5	Numerous City meetings (I'm on committees for Emergency Operations, Contingency Planning, Recreation, COVID Assessment, and Social Media). I also had 1 meeting as a member of the selection committee for the Statewide

Director's Meetings in December 2020					
					Library Electronic Doorway (SLED).

Staff Notes

Most staff completed de-escalation training, as part of a Citywide effort, on Nov. 30. I completed a self-care webinar on Dec. 7. Claudia Haines collaborated with other public librarians and MIT Media Lab to design new media resources, specifically a book for teaching kids about symmetry. She also presented a webinar through WGBH on Dec. 15, to help teach computational thinking.

Facility

Semi-permanent white lights were installed around the upper roofline to promote the holiday spirit, and we put up a Christmas tree and colored lights in the fireplace lounge. One of the little libraries, from the old Cosmic Kitchen, was set up outside the front door of the building.

The bidding process for replacing the security cameras closed on Dec. 30.

Library Advisory Board (LAB)

The LAB met on Dec. 1 and assigned tasks to individual members, including drafting a case statement for the library endowment fund, compiling a list of prospective donors, roughing out some advertising materials, and other developmental projects related to planned giving. There will be a special LAB worksession on January 26, at 5:30, to further develop plans.

Friends of the Homer Library (FHL)

FHL welcomed Cheryl Illg as its new coordinator, replacing the excellent Mercedes Harness. Cheryl plunged wholeheartedly into the new job and has already distinguished herself!

There were several meetings related to ongoing projects: overhauling the FHL website, developing a planned-giving program, and improving the western lot. On this last topic, Lyn Maslow has reached out to the National Parks Service for assistance in formally designing a trail on the lot. Many community partners are on board with improving the lot, and once an official proposal has been developed, it will be brought to the City for consideration.

Events in December 2020		
Date	**Time**	**Event**
12/4	11:00-12:00	*Alice's Ordinary People* with filmmaker Craig Dudnick (via Zoom)
12/12	11:00-12:00	Google Hour of Code (via Zoom)
12/13	1:00-4:00	Second Sunday Shakespeare: *The Winter's Tale* (via Zoom)
12/14 to 12/31	All day	Makers2Mentors Kit: Janju Tets' (self-paced at home)
12/15	7:00-8:00	DIY Zines for Teens (via Zoom)
12/18, 12/25	3:00-4:00	Storytime for Grownups (via Zoom)
12/24	10:00-1:00	Library open half day for Christmas Eve
12/25	All day	Library closed for Christmas Day
12/31	10:00-1:00	Library open half day for New Year's Eve

Upcoming Events in January 2021		
Date	**Time**	**Event**
1/1	All day	Library closed for New Year's
1/10	1:00-4:00	Second Sunday Shakespeare: *Twelfth Night* (via Zoom)

Ongoing Events		
Date	**Time**	**Event**
Thursdays	10:00-11:00	Storytime on KBBI with Claudia Haines

Ongoing Events		
Fridays	3:00-4:00	Storytime for Grownups (via Zoom)
First Tuesday	6:30-8:00	SPARC Radio Club (via Zoom)
First Thursday	1:00-3:00	Literary Ladies (via Zoom)
Fourth Tuesday	4:30-6:30	FHL Book Club (via Zoom)

Director's Report, Homer Public Library

January 27, 2021

General Notes

The City will be moving to Code Orange status on Monday, Feb. 1. For the library, this means admitting patrons to the building by reservation.

Director's Meetings in January 2021					
Library Advisory Board (LAB)	Friends of Homer Library (FHL)	Staff	City Council	Department Heads	Other
1	4	4	2	4	Numerous City meetings

Staff Notes

Claudia Haines won admission to a competitive course in podcasting. The course teaches how to use podcasts as a tool for online storytelling, and drew applicants from across the country. She is the only public librarian in the course—the rest of the students are all school staff.

Facility

The Christmas tree has been taken down, although the lights are still up.

Library Advisory Board (LAB)

The LAB met for a worksession on Jan. 26. This was a special event to develop a coordinated fundraising strategy with FHL. There will obviously be much more work to do, but the meeting was very productive.

Friends of the Homer Library (FHL)

FHL moved ahead with applying for an RTCA grant from the National Parks Service. This will help with formal planning for improvements on the western lot. Lyn has also reached out to Caroline Venuti about drafting a City Council resolution expressing support for the project.

As mentioned above, the LAB worksession covered joint fundraising between the LAB and FHL. Both groups have a lot to contribute, and there's a lot of room for collaboration!

Events in January 2021		
Date	**Time**	**Event**
1/1	All day	Library closed for New Year's
1/10	1:00-4:00	Second Sunday Shakespeare: *Twelfth Night* (via Zoom)

Upcoming Events in February 2021		
Date	**Time**	**Event**
Tuesdays 2/2-2/23	6:00-7:00	Mothers of Black History (via Zoom)
2/3	11:00-11:30	World Read Aloud Day with Nadia Salomon (via Zoom)
Wednesdays 2/10-3/3	10:00-10:30	Little Makers Winter (via Zoom)
2/14	1:00-4:00	Second Sunday Shakespeare: *Romeo and Juliet* (via Zoom)
2/15	All day	Library closed for Presidents' Day
Thursdays 2/18-3/11	12:00-1:30	Story of Climate Change Reading Group (via Zoom)
2/25	6:00-7:30	Stamped: Book Discussion for Teens (via Zoom)

Ongoing Events		
Date	**Time**	**Event**
Thursdays	10:00-11:00	Storytime on KBBI with Claudia Haines
Fridays	5:00-6:00 **Note time change**	Storytime for Grownups (via Zoom)

Ongoing Events		
First Tuesday	6:30-8:00	SPARC Radio Club (via Zoom)
First Thursday	1:00-3:00	Literary Ladies (via Zoom)
Fourth Tuesday	4:30-6:30	FHL Book Club (via Zoom)

Homer Public Library Statistical Summary for 2020

Date: 27-Jan-21

CIRCULATION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Y.T.D.
Total # of Items	14,449	13,454	8,751	3,205	4,478	4,975	6,044	6,633	6,910	7,836	5,749	5964	88,448
INTERLIBRARY LOANS													
Incoming (Borrowed)	13	16	11	0	0	0	0	0	0	0	0	0	40
Outgoing (Lent)	50	25	4	0	0	0	0	0	0	0	0	0	79
STUDY ROOM USE													
# of groups	297	274	111	0	0	0	0	10	10	6	0	0	708
# of people	566	487	195	0	0	0	0	11	12	10	0	0	1281
MEETING ROOM USE													
# of groups	34	32	12	0	0	0	0	0	0	0	0	0	78
ATTENDANCE													
TOTAL (*Included)	10,966	9,892	4,338	1,310	905	897	4,328	3,808	4,049	5,561	2,723	4772	53549
*Story Hour & Lapsit	273	237	134	0	0	0	0	0	0	0	0	0	644
*School Classes	24	12	0	0	0	0	0	0	0	0	0	0	36
Internet sessions	3,310	3,227	1,387	63	203	461	533	529	734	919	910	859	13135
*Programs	715	487	207	44	216	151	185	178	217	315	138	253	3106
OUTREACH													
# Visits	6	6	3	12	28	13	12	10	14	14	9	6	133
# People	54	59	25	1266	668	719	4096	3059	2722	3889	2588	4519	23664
NEW CARDS ISSUED													
City	24	18	11	0	8	5	8	14	20	21	6	7	142
Borough	33	30	10	4	4	2	3	14	10	9	3	4	126
Temporary	0	1	2	0	0	0	0	2	0	1	0	0	6
Reciprocal	1	0	1	0	0	1	0	1	1	1	0	0	6
VOLUNTEER HOURS													
# of people	79	69	44	6	2	7	12	19	20	16	16	14	304
# of hours	178.5	185	111.5	62.5	8.5	92	138.5	177.5	250	166.5	159.5	172	1702
MATERIALS ADDED													
Books	316	393	120	421	135	83	120	54	191	318	141	162	2454
Audio	19	9	0	0	7	0	0	7	13	19	9	0	83
Video	64	144	0	46	31	114	27	31	2	72	61	29	621
Serials	0	0	0	0	0	0	0	0	0	0	0	0	0
Electronic Resources	0	0	0	0	11	0	0	0	0	0	0	0	11
MATERIALS REMOVED													
Books	231	218	96	18	71	185	304	204	105	81	76	27	1616
Audio	76	41	0	0	0	0	0	0	2	1	0	0	120
Video	26		6	0	201	3	0	0	1	75	0	205	517
Serials	1	2	0	0	0	0	1	1	0	0	0	0	5
Electronic Resources	0		0	0	0	0	0	0	0	0	0	0	0
REVENUES DEPOSITED													
Fines/Fees/Copies	2338.21	2250.40	1335.91	0.00	0.00	0.00	4.36	795.86	0.00	543.21	50.20	30.00	7,348.15
Building Fund (151-)													0.00
Library Gifts (803-)						5000.00							5,000.00
Grants		700.00						7000.00	79492.00				87,192.00
TOTALS	2,338.21	2,950.40	1,335.91	0.00	0.00	5,000.00	4.36	7,795.86	79,492.00	543.21	50.20	30.00	$99,540.15

Data not available yet or incomplete

*HPL closed to the public March 14.
*HPL began curbside pickup circulation April 29.
*HPL began admitting small groups of people to the building May 20.
*HPL began admitting people without reservations on October 5.
*Building closed to the public October 29.

City of Homer
www.cityofhomer-ak.gov

Homer Public Library
500 Hazel Avenue
Homer, AK 99603
library@cityofhomer-ak.gov
(p) (907)-235-3180
(f) (907)-235-3136

Memorandum

TO: LIBRARY ADVISORY BOARD

FROM: DAVID BERRY, LIBRARY DIRECTOR

DATE: JANUARY 27, 2021

SUBJECT: PLANNED GIVING JOINT FUNDRAISING WITH FHL

At its worksession on Jan. 26, the LAB made significant progress towards a joint fundraising operation with the Friends of the Homer Library. While there is significant work still to be done, there seems to be a framework in principle.

While FHL is still discussing matters with their Board, the LAB can still make progress towards various tasks:

- Designating one LAB member to serve as the liaison with FHL
- Designating one LAB member as the official "thank-you card writer" (Boardmember Vernon has kindly offered to take this role)
- Revise advertising materials to include all forms of financial donation to the library: the endowment fund, the FHL endowment fund, and FHL directly (Library Director Berry and Chair Kuszmaul will tackle this, with editorial recommendations from the LAB)
- Continue to refine and expand the list of prospective donors (Boardmember Finn has taken this on)

RECOMMENDATION

Evaluate the advertising materials already developed and identify changes that will broaden the scope. If possible, recognize boardmembers who would like to serve in the various capacities.

List of Planned Giving Materials

Library Advisory Board (LAB)

Case Statement
Developed by Clark Fair, December 2020

List of Potential Donors and Influencers
Developed by Kate Finn and Jacque Peterson, January 2021

Donor Recognition Policy
Developed by Dave Berry; debated by LAB and library staff, September 2019

Advertising Materials
Developed by Marcia Kuszmaul and Dave Berry, January 2021

Bookmark
Thank-you card
Quarter-page chart: Library Endowment and FHL
Planned Giving FAQ

Planned Giving Plan
Developed by Marcia Kuszmaul, December 2020

Friends of Homer Library (FHL)

Planned Giving Plan
Developed by Miranda Weiss and Joy Stewart, December 2020

Joint FHL-LAB?

Bookmark
Developed by Dave Berry, January 2021

Case Statement—LAB

In the 1940s, the Homer Women's Club founded Homer's first library inside a 600-square-foot log cabin. Later generations invested in new buildings, invented new programs, adjusted to changing technologies and found new ways to meet our city's needs. If you love your library and believe in literacy, education and life-long learning, please consider making a personally significant gift to the endowment fund. Share the power of knowledge with all who seek it.

List of Potential Donors and Influencers—LAB

Under development.

Donor Recognition Policy—LAB (Discussed but never adopted; some January 2021 revisions below in red text)

HOMER PUBLIC LIBRARY
DONATION ACCEPTANCE AND MANAGEMENT POLICY
SEPTEMBER 4, 2019

The library welcomes donations of materials, funds and other real property. Donations will be managed differently depending on the type of donation and its uses.

MATERIALS

The Library Director shall be authorized to accept gifts of materials on behalf of the library. The library adds gift materials to the collection with the understanding that such material is an integral part of the collection. The library will not set up special collections and will not permit circulation restrictions or stipulations for future use. Books and other materials not deemed appropriate for inclusion in the library collection may be offered to other libraries or institutions, offered for sale, or returned to the donor upon request.

ARTWORK

All donations of artwork are referred to the Parks, Art, Recreation and Culture Advisory Commission (PARCAC), which evaluates donations in accordance with their policies.

EQUIPMENT AND OTHER PHYSICAL ITEMS

When considering any gift, the Library Director may solicit the recommendation of a gift acceptance committee, a group made up of advisors knowledgeable about financial, legal, and community matters, to be chosen by the Library Director. Authority for accepting or rejecting gifts resides with the Library Director, although gifts valued at $5,000 or more may require further approval of the Library Advisory Board and/or the Homer City Council. Gifts that may require an opinion from the gift acceptance committee include, but are not limited to, the following:

- Any gift with recognition requirements other than those ordinarily provided by the library or Friends of Homer Library.
- Gifts of valuables that will encumber the library either financially or administratively.
- Large or highly specialized equipment, which requires operator expertise beyond that normally held by library staff.

Because of limited space, as a general rule the library is unable to accept donations of furnishings or other tangible personal property given on condition that they be retained by or displayed at the library.

FUNDS

Financial donations are directed to different places, depending upon the donor's intent. Donors who wish to support purchases of library materials, replacement or upgrading of library equipment, or improvements to library facilities, should donate to the Library Endowment Fu[illegible]hich is managed by Homer Foundation. Donors who

wish to support library programs, outreach, the bookmobile or various volunteer opportunities should donate to the Friends of Homer Library, an independent nonprofit organization.

As a general rule, the library and the Friends of Homer Library cannot accept restrictions for specific purposes, such as particular collections or programs. Donors who wish to make a restricted gift should contact the Library Director to discuss options.

SECURITIES, REAL ESTATE AND OTHER NON-CASH DONATIONS

The Library Endowment Fund will also accept donations in all of the following categories, with the understanding that such donations will be liquidated and the resulting monies deposited in the Endowment Fund:

- Securities. Marketable securities are strongly preferred, but the Endowment Fund will also consider closely held stock, limited partnership interests, joint venture interests, and other forms of investments that may not fall into the marketable securities category.
- Real estate. Every proposed gift of real estate must be examined on its individual merits, including, but not limited to, the title to the property and its insurability, the results of environmental investigations, and marketability. The donor must provide an appraisal by a qualified appraiser, completed within the previous 12 months.
- Gift annuities.
- Charitable Remainder or Lead trusts.
- Named endowment funds.
- Life insurance policies. Any proposed gift of life insurance must be examined on its merits, including, but not limited to, the type of insurance, the status (paid-up, vanished, etc.) of the policy, outstanding loan balances, and the long-term viability of the insurance company.
- Estate remainders. The Library Endowment Fund can be named as a beneficiary in a will.

The library does not accept donations that are not outright gifts. The library, the Friends of Homer Library and the Library Endowment Fund reserve the right to decline any gift that interferes with the library's ability to fulfill its mission or that unduly encumbers either the library or the City of Homer.

The library cannot legally appraise gifts for tax purposes. Donors will be provided a signed and dated gift statement as a receipt.

Donor Recognition

Thank you for your donation! Contributions from the public are critical to the success of Homer Public Library. We like to show our appreciation in various ways:

- *We thank donors by name on the library's website, unless you would rather be anonymous.*
- *For donations of $500 or more:* ***XXXX.***
- *Donations of $10,000 or more can carry naming rights for a fixture or structure. Note that all naming requests require approval from the Homer City Council.*

Instructions from Donors to Staff

ABOUT ME
☐ I prefer to remain anonymous.
☐ My name is: _____ I can be contacted at: _____

ALL DONATIONS
☐ I would like my name to be listed in the library's Year-End Summary.

FUNDS
☐ I would like my donation to go to the Homer Public Library endowment fund, which supports purchases of materials, equipment and improvements to facilities and services.
☐ I would like my donation to go to the Friends of Homer Library, in support of public programs, outreach and the Bookmobile.

See reverse side for other kinds of donations.

BOOKS, MAGAZINES AND OTHER MATERIALS

If the item is not selected for the library's collection, we will forward it to the Friends of Homer Library book sale. If the item is selected for inclusion in the library's collection:

☐ Please add a bookplate with this message on it:

_____

For magazines and newspapers:

☐ I would like to sponsor a subscription to a magazine or newspaper. Note that such subscriptions are subject to approval from the Library Director. Title of publication:

_____

ARTWORK, EQUIPMENT, ETC.

Sadly, we don't have space for all the donations we receive, so we evaluate donations on a case-by-case basis. We refer donations of artwork to the Homer Parks, Art, Recreation and Culture Advisory Commission (PARCAC), which may display such works anywhere in the city. If the item is not selected for use or display, we will forward it to the Friends of Homer Library book sale.

Help secure our future.

Homer Public Library Endowment Fund
https://www.homerfoundation.org/give-now

The very existence of libraries affords the best evidence that we may yet have hope for the future of man.

T.S. Eliot

The very existence of libraries affords the best evidence that we may yet have hope for the future of man.

T.S. Eliot

Thank you.

Your support helps secure the future of the Homer Public Library.

Ways to Support Homer Public Library

Friends of Homer Library

https://friendsofthehomerpubliclibrary.wildapricot.org

- Public programs
- Outreach
- The bookmobile
- Booksale/volunteers

Donations accepted:

- At library checkout
- At the website above
- At the Homer Foundation (choose "Friends of Homer Public Library Endowment Fund")

Library Endowment Fund

www.homerfoundation.org/give-now

- Buys materials and equipment
- Improves facilities

Donations accepted:

- At library checkout
- At the website above (choose "Library Endowment Fund")

Planned Giving FAQ—LAB

Q: What is the Library Endowment Fund?

A: The Library Endowment Fund gives those who love the Homer Public Library and believe in literacy, education and life-long learning the means to strengthen and protect the library today and into the future through donations and planned gifts. The Homer City Council established the fund in 2020 upon recommendation and support of the citizen Library Advisory Board and Library Director.

In the 1940s, the Homer Women's Club founded Homer's first library inside a 600-square-foot log cabin. Later generations invested in new buildings, invented new programs, adjusted to changing technologies and found new ways to meet our city's needs. Now, the Library Endowment will secure for future generations the ability to share the power of knowledge with all who seek it.

Q: How does the Library Endowment Fund support the mission of the library?

A: The Library Endowment Fund is a source of sustainable support for the library's mission to serve the diverse needs of our community members by providing access to information, promoting literacy, and facilitating lifelong learning. The library fosters education, personal well-being, cultural creativity, community engagement, and economic development. Its resources are offered without charge to people of all ages and abilities within our service area, which includes the communities of the southern Kenai Peninsula from Ninilchik south.

Q: How does the Library Endowment Fund work?

A: The Library Endowment Fund is a permanent Field of Interest fund with The Homer Foundation. Gifts to the fund grow the principal. Income from the fund is distributed annually to the library to provide a sustained source of support and to address areas of most urgent need. The Homer Foundation's investments are managed by the Vanguard Group.

Q: What is The Homer Foundation?

A: The Homer Foundation is a community foundation whose mission is to enhance the quality of life for the citizens of the greater Homer area while helping donors fulfill their philanthropic goals. Established in 1991, The Homer Foundation was the first community foundation in Alaska. Full information about The Homer Foundation is available here.

Q: Is there a financial goal for the Library Endowment Fund?

A: The Library Advisory Board has set a goal to establish an initial balance of $100,000 in the Library Endowment Fund. At this level, annual income will provide significant additional income for the library to use where most needed.

Q: How can I contribute to the Library Endowment Fund?

A: Donors to the Library Endowment Fund with The Homer Foundation have a wide range of giving options. Gifts may include cash, publicly traded securities, real estate, life insurance, disbursement from an individual retirement account (IRA), bequests and other planned giving options.

To donate now, visit the Donation page, click the Donate button, and select Library Endowment from the drop-down menu. Cash or check donations can also be dropped off at the library's front desk.

To make a bequest to the library, go to Planned Giving for information and next steps.

Q: Is my gift tax-deductible?

A: Yes. All gifts to the Library Endowment Fund are fully tax deductible.

Q: What is Planned Giving?

A: Planned Giving is making a personally significant gift through your will, charitable trust or designating the Library Endowment as a beneficiary of a retirement plan or life insurance policy.

Q: What are the benefits of Planned Giving?

A: Through a bequest, you can establish an enduring commitment to the Homer community and continue the pattern of philanthropy established during your lifetime. A bequest can help ensure the things you supported and cared about can continue while also helping you achieve your financial planning goals.

Those who notify The Homer Foundation of bequests to the Library Endowment are invited to join its Legacy Society and will receive recognition, now and in the future, that will in turn encourage others to consider bequests as both a planned giving option and a way of giving back to their communities. A bequest can easily be made by naming the Homer Foundation as beneficiary in your estate planning documents. An estate planning professional or staff at The Homer Foundation can help you determine how best to fulfill your goals for your charitable legacy.

Q: Why does the library need an endowment fund? Isn't it a city department funded by our tax dollars?

A: While the City of Homer provides an annual budget for basic operations through the General Fund, the Library Endowment will supplement those funds to ensure the library can keep the library collection current, upgrade equipment and introduce new technologies.

Q: What's the difference between the Library Endowment and the Friends of the Homer Library Fund? Both accept gifts and both have a fund with The Homer Foundation.

A: The Endowment and the Friends Fund provide different but complementary support for the library. The Friends provide volunteer support for library programs and promote the use and enjoyment of the library. Projects include BOB the bookmobile, the Summer Reading and Learning Program, the library Story Walk, the Celebration of Lifelong Learning, and more.

The Library Endowment supports purchases of library materials, replacement or upgrades to library equipment, and improvements to library facilities.

Gifts to both funds help the library and are greatly appreciated.

DRAFT PLANNED GIVING PLAN for Library Endowment Fund

The draft plan below is an outline for the Library Advisory Board to consider to launch a planned giving program for the Library Endowment with The Homer Foundation. All ideas and suggestions are presented for discussion.

Background

In 2019, the Library Advisory Board (LAB), library director and City of Homer staff worked together to establish the Library Endowment Fund with The Homer Foundation. The library and the LAB now have the means to promote and accept gifts that can directly benefit core library operations.

Specifically, the LAB has set a goal to initiate a Planned Giving program as part of its role to "solicit donations of money and/or property for the benefit of the library." By definition, a planned gift (or legacy gift) is any major gift, made in lifetime or at death as part of a donor's overall financial and/or estate planning. These include gifts of equity, life insurance, real estate, personal property, or cash.

With the Library Endowment Fund in place, the LAB now turns its attention to soliciting those planned gifts.

Who Might Give

While we can't predict who may be motivated and have the means to make a legacy gift, the most likely donor will be a person who already is a strong library supporter/enthusiast and/or frequent library user. These are individuals or families whose lives have benefited from library services, such as, but not limited to:

- Donors to campaign for new library building (lowest hanging fruit)
- Parents and grandparents whose children have benefited from library materials and programming such as storytime, tutoring, after-school activities and summer learning
- Business community/entrepreneurs who have used the library to start or expand their businesses
- Life-long learners who frequently have used the library to pursue personal interests, find a job, acquire new skills, complete a degree or certification

The LAB also can reach out to key local influencers -- local attorneys, financial planners and tax advisors – to provide information about the Library Endowment.

Why Give

A simple, compelling case statement can be a conversation starter about the Library Endowment and be the basis for print, online and in person communications. Below is a statement provided to The Homer Foundation for its Annual Report announcing the new fund and two draft statements adapted from what other libraries have said about planned giving.

> "In the 1940s, the Homer Women's Club founded a library in a 600-square-foot cabin. Later generations renewed the commitment to their community and their library, investing in new buildings, inventing new programs, and adjusting to changing technologies. Now, we carry that

commitment forward again with a new endowment fund that will support local literacy and lifelong learning for generations to come."

-- Marcia Kuszmaul, Chair, Library Advisory Board & David Berry, Director, Homer Public Library

Draft case statements – freely borrowed from other libraries' statement in the Appendix.

- Those who love the Homer Public Library and its integral role in our community have the power to strengthen and protect it -- today, tomorrow and into the future – by making a planned gift. Making a personally significant gift to the library speaks to your belief in the power of knowledge, made freely available to all. (See Samuels Public Library)

- The Homer Public Library has been an integral part of our community for nearly 80 years, even before the city's incorporation. A planned gift to the Library Endowment Fund helps ensure that the library resources and services that we depend on and enjoy today are available for future generations. (See Free Library of Philadelphia)

Giving Goal

The current balance in the Library Endowment fund is approximately $14,000. In the Appendix are projections Library Director Berry prepared to illustrate endowment growth and payout across low, medium and high giving scenarios. Ideally, the LAB would set and work toward a measureable, obtainable goal to jumpstart the Library Endowment and accelerate its benefit to the library.

Potential goals could be:

- $50,000 in 5 years
- $10,000 per year
- 3 pledged/planned gifts per year

How to Launch and Promote

Create Core Materials

At minimum, the LAB and library staff would collaborate to develop and produce a few basic materials that current and future LAB members and library staff can use over time to promote planned giving and the Library Endowment.

- Fact Sheet – a one-page tool that details the basic messaging and facts regarding the Library Endowment and how to give. The Fact Sheet could be posted online or used as the basis for print, online and in-person communications.
- FAQ – a one-page FAQ to address common questions that potential donors may have, such as how Library Endowment differs from Friends fund

Execute Breadth Communications

Tactics to reach out to the community broadly include:

- Planned giving opportunity information on Library online Donate page -- https://www.cityofhomer-ak.gov/library/donate
- Poster for Library bulletin board with matching bookmark for distribution (perhaps also timed for National Library Week or September Library Card Sign-up Month)
- Donation jar/box at circ desk – could be a 50/50 share between Friends/Library Endowment, or give folks choice or highlight fine-free with text something like "Your donation helps HPL stay fine-free"
- National Library Week editorial/PSAs (April 4-10,2021)
- Annual report to City Council

Plan and Execute Targeted Communications

Tactics to reach targeted individuals/groups:

- Develop prospect lists including community members who supported library building campaign, sympathetic local businesses and vendors, frequent library users, personal contacts, etc.
- Engage 1:1 with prospects.
- Work with The Homer Foundation to develop specific outreach to its Legacy Society.
- 1:1 informational meetings with local influencers – estate attorneys, financial advisors, etc.

Launch with a Challenge Grant Program

We can only launch once so we should consider how to maximize this opportunity. The Homer Foundation has suggested that a challenge/matching campaign could engage and motivate potential donors. To that end, we could work with The Homer Foundation to:

- Leverage initial investment from the city to challenge others to "match" the city's investment.
- Identify individuals and/or businesses that may be willing to develop a challenge match to inspire others to give.

APPENDIX

Sample Planned Giving "case statements":

- **Free Library of Philadelphia**

An Inspirational Legacy: Secure the Free Library's Tomorrow—Make a Planned Gift Today

The Free Library of Philadelphia has been an integral part of our community for over 100 years. A planned gift to the Free Library of Philadelphia Foundation helps to ensure that the Library's engaging programs, in-depth resources, and critical services will be available for future generations to depend on and enjoy.

- **The Library of Congress**

The reason for making a gift to the Library of Congress may be different for each donor — to honor a loved one, to support a tradition of excellence or to express gratitude for a service well-performed. Whatever the motivation for your gift, a planned gift can give you the assurance that you are being a good steward of your assets by increasing the benefits for yourself, family members, and the organization receiving the gift.

- **Samuels Public Library, Front Royal, VA**

Those who love Samuels Library have the power to strengthen and protect it—today, tomorrow, and into the future by making a planned gift. A Planned Gift to Samuels Library . . . Makes a personally significant gift that speaks to your belief in the power of knowledge, made freely available to all.

- **Ridgefield Library, Ridgefield, CT**

Planned giving allows donors to make a significant or long-term commitment to the Ridgefield Library while also considering their own financial planning goals.

- **New York Public Library**

. . . opportunity to make an impact, allowing us to continue to provide free and open access for all—as well as a place for people from all walks of life to come together to discuss, debate, and be inspired**,** now and well into the future.

- **Phoenixville Public Library, Phoenixville, PA**

Planned Giving is an effective way to have an impact on the future well-being of Phoenixville's Public Library.

- **West Des Moines Public Library, West Des Moines, IA**

A planned gift to a charitable organization like The West Des Moines Public Library allows you to make a positive difference in our community while also making a wise financial decision.

If you want to be a supporter of the Library for years to come, planned giving may be a way to achieve that. When you honor your community by putting The Library in your will or estate plan, there are benefits to you and your family beyond just giving to a good cause.

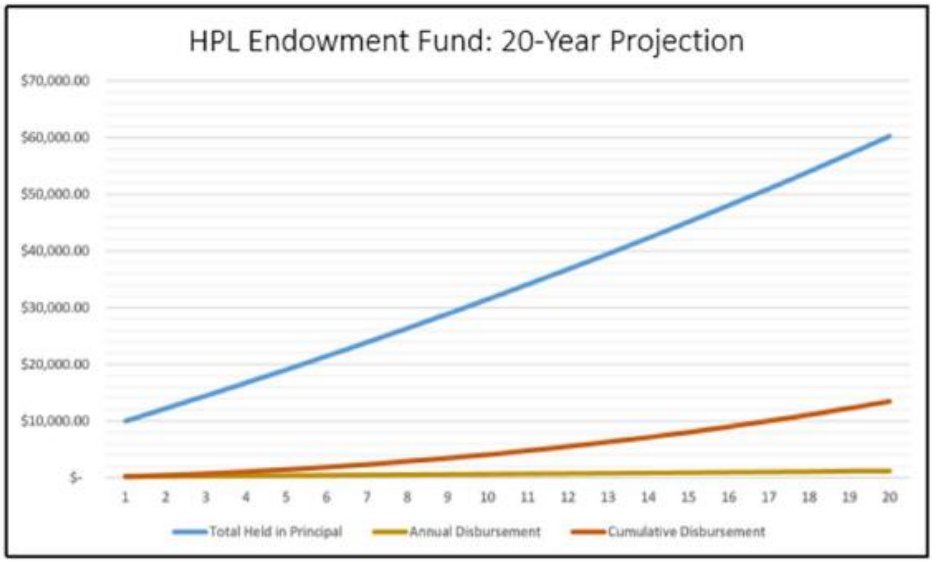
- **Calgary Public Library, Alberta, Canada**

A gift that keeps on giving . . . By leaving the Calgary Public Library a gift in your will, or committing your support in a number of other ways, you will provide the Library with a critical source of long-term funding – a gift that will help generations of Calgarians.

Starting contribution:	$ 10,000.00
Annual contributions:	$ 2,000.00
Market return:	5.00%
- Inflation proofing:	2.00%
- Administration fees:	1.00%
= Disbursement rate:	2.00%

Low Estimate
($2k Annual Contributions, 5% Market Rate)

Years After Initial Contribution	Total Held in Principal	Annual Disbursement	Cumulative Disbursement
1	$ 10,000.00	$ 200.00	$ 200.00
2	$ 12,200.00	$ 244.00	$ 444.00
3	$ 14,444.00	$ 288.88	$ 732.88
4	$ 16,732.88	$ 334.66	$ 1,067.54
5	$ 19,067.54	$ 381.35	$ 1,448.89
6	$ 21,448.89	$ 428.98	$ 1,877.87
7	$ 23,877.87	$ 477.56	$ 2,355.42
8	$ 26,355.42	$ 527.11	$ 2,882.53
9	$ 28,882.53	$ 577.65	$ 3,460.18
10	$ 31,460.18	$ 629.20	$ 4,089.39
11	$ 34,089.39	$ 681.79	$ 4,771.17
12	$ 36,771.17	$ 735.42	$ 5,506.60
13	$ 39,506.60	$ 790.13	$ 6,296.73
14	$ 42,296.73	$ 845.93	$ 7,142.66
15	$ 45,142.66	$ 902.85	$ 8,045.52
16	$ 48,045.52	$ 960.91	$ 9,006.43
17	$ 51,006.43	$ 1,020.13	$ 10,026.56
18	$ 54,026.56	$ 1,080.53	$ 11,107.09
19	$ 57,107.09	$ 1,142.14	$ 12,249.23
20	$ 60,249.23	$ 1,204.98	$ 13,454.21

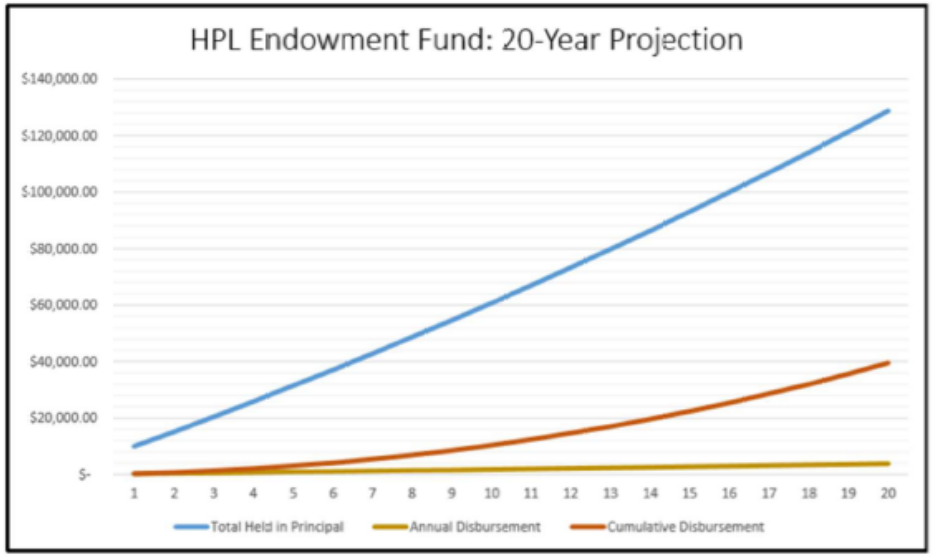


Compare with Wyoming Community Foundation's Endowment Calculator (https://wycf.org/endowment-calculator)
and Investor.gov (https://www.investor.gov/additional-resources/free-financial-planning-tools/compound-interest-calculator)

Starting contribution:	$ 10,000.00
Annual contributions:	$ 5,000.00
Market return:	6.00%
- Inflation proofing:	2.00%
- Administration fees:	1.00%
= Disbursement rate:	3.00%

Medium Estimate
($5k Annual Contributions, 6% Market Rate)

Years After Initial Contribution	Total Held in Principal	Annual Disbursement	Cumulative Disbursement
1	$ 10,000.00	$ 300.00	$ 300.00
2	$ 15,200.00	$ 456.00	$ 756.00
3	$ 20,504.00	$ 615.12	$ 1,371.12
4	$ 25,914.08	$ 777.42	$ 2,148.54
5	$ 31,432.35	$ 942.97	$ 3,091.51
6	$ 37,061.01	$ 1,111.83	$ 4,203.34
7	$ 42,802.23	$ 1,284.07	$ 5,487.41
8	$ 48,658.27	$ 1,459.75	$ 6,947.16
9	$ 54,631.44	$ 1,638.94	$ 8,586.10
10	$ 60,724.07	$ 1,821.72	$ 10,407.82
11	$ 66,938.55	$ 2,008.16	$ 12,415.98
12	$ 73,277.32	$ 2,198.32	$ 14,614.30
13	$ 79,742.87	$ 2,392.29	$ 17,006.59
14	$ 86,337.72	$ 2,590.13	$ 19,596.72
15	$ 93,064.48	$ 2,791.93	$ 22,388.65
16	$ 99,925.77	$ 2,997.77	$ 25,386.42
17	$ 106,924.28	$ 3,207.73	$ 28,594.15
18	$ 114,062.77	$ 3,421.88	$ 32,016.04
19	$ 121,344.02	$ 3,640.32	$ 35,656.36
20	$ 128,770.90	$ 3,863.13	$ 39,519.48

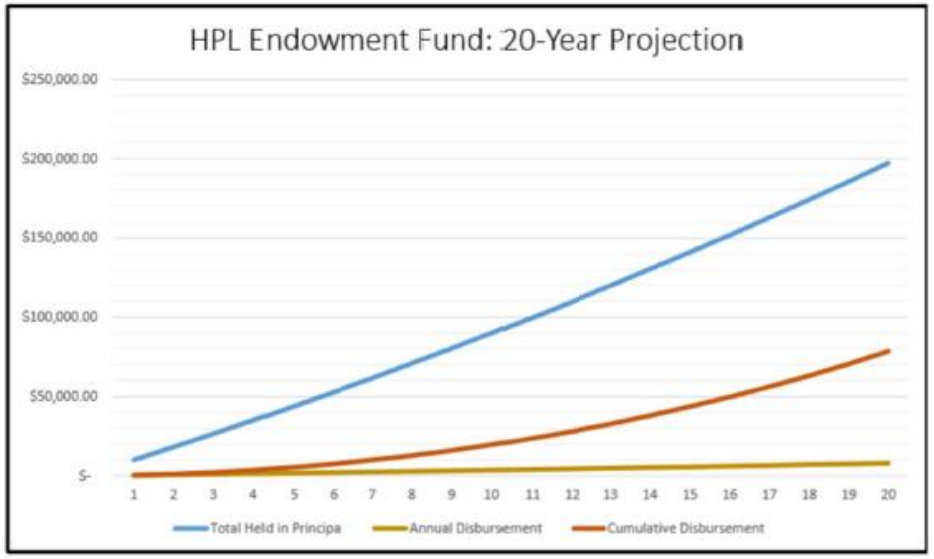


Compare with Wyoming Community Foundation's Endowment Calculator (https://wycf.org/endowment-calculator)
and Investor.gov (https://www.investor.gov/additional-resources/free-financial-planning-tools/compound-interest-calculator)

Starting contribution:	$	10,000.00
Annual contributions:	$	8,000.00
Market return:		7.00%
- Inflation proofing:		2.00%
- Administration fees:		1.00%
= Disbursement rate:		4.00%

High Estimate
($8k Annual Contributions, 7% Market Rate)

Years After Initial Contribution	Total Held in Principal	Annual Disbursement	Cumulative Disbursement
1	$ 10,000.00	$ 400.00	$ 400.00
2	$ 18,200.00	$ 728.00	$ 1,128.00
3	$ 26,564.00	$ 1,062.56	$ 2,190.56
4	$ 35,095.28	$ 1,403.81	$ 3,594.37
5	$ 43,797.19	$ 1,751.89	$ 5,346.26
6	$ 52,673.13	$ 2,106.93	$ 7,453.18
7	$ 61,726.59	$ 2,469.06	$ 9,922.25
8	$ 70,961.12	$ 2,838.44	$ 12,760.69
9	$ 80,380.35	$ 3,215.21	$ 15,975.91
10	$ 89,987.95	$ 3,599.52	$ 19,575.42
11	$ 99,787.71	$ 3,991.51	$ 23,566.93
12	$ 109,783.47	$ 4,391.34	$ 27,958.27
13	$ 119,979.14	$ 4,799.17	$ 32,757.44
14	$ 130,378.72	$ 5,215.15	$ 37,972.59
15	$ 140,986.29	$ 5,639.45	$ 43,612.04
16	$ 151,806.02	$ 6,072.24	$ 49,684.28
17	$ 162,842.14	$ 6,513.69	$ 56,197.96
18	$ 174,098.98	$ 6,963.96	$ 63,161.92
19	$ 185,580.96	$ 7,423.24	$ 70,585.16
20	$ 197,292.58	$ 7,891.70	$ 78,476.86



Compare with Wyoming Community Foundation's Endowment Calculator (https://wycf.org/endowment-calculator)
and Investor.gov (https://www.investor.gov/additional-resources/free-financial-planning-tools/compound-interest-calculator)

Libraries Are For Everyone.

Libraries Are Forever.

A Planned Giving Blueprint
for the
Friends of the Homer Library

Provided by:
Miranda Weiss
mirandaweiss@gmail.com
907.299.5550

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A FORWARD ABOUT FUNDRAISING

The first thing to know about fundraising is that, contrary to what many people think, the bulk of charitable giving doesn't come from private foundations, corporate sponsorships, or government grants. The bulk of charitable giving comes from individuals—about 70% of all philanthropic giving in the U.S., according to *Giving USA.*

The second thing to know is that good fundraising is based on good relationships.

Good fundraising is not about whether you know the nitty gritty about tax incentives.

It's not about memorizing financial terms.

It's also not about perks and gifts.

Good fundraising is built on good relationships with donors, which are usually built on three things:

Shared passion.

You and the donor both believe in the mission, values, and vision of the organization.

Trust.

You are reliable, open, and clear.

Follow-through.

You are responsible for following up on conversations, questions, and commitments.

These things require honest, regular, and engaging communication; careful listening; good record-keeping; and relentless follow-up.

Identifying prospective donors and getting to know them is a lot like building friendships. You ask these individuals about their interests and passions. You seek to understand where those come from. With fundraising, you build off these fundamentals to deepen a donor's connection to the organization's mission and activities as well as her or his investment in the organization.

And once relationships are built, good fundraising from individual donors requires knowing who should ask, making the ask, waiting for an answer, and then thanking the donor for the gift. Individual donor fundraising is a continual process of relationship-building, asking, and thanking.

PLANNED GIVING 101

What is planned giving?
Planned giving is the process of making a charitable gift during a donor's life or at the donor's death that is part of her or his financial plan. Planned giving can allow donors to support organizations with larger gifts than can be made with ordinary income. According to *Giving USA,* planned giving amounts to about 10% of charitable donations in the U.S. each year.

What kinds of donations can be planned gifts?
Planned gifts can take many forms, and can be as simple as a cash gift specified in a will (a bequest). Planned gifts can also include appreciated securities (e.g., stocks, bonds, etc.), life insurance, retirement accounts, real estate, artwork, jewelry, or other property.

Planned gifts also include more involved donation vehicles, such as charitable remainder trusts, charitable lead trusts, and gifts of plans and policies such as Roth IRAs and life insurance plans.

What kind of donor is a good prospect for planned giving?
You don't have to be a millionaire to make a planned gift! Planned giving is for any donor who wants to think ahead to support an organization. Planned giving isn't just for people with extensive stock portfolios or real estate holdings. It isn't just for people who have no children or other heirs. Any donor can make a planned gift to an organization.

What are the benefits to the donor?
Planned giving can enable donors to make gifts to organizations that are larger than they'd be able to make through conventional donations. There can also be significant tax benefits to donors and heirs with planned gifts. And planned giving can be rewarding ways for donors to leave legacies in their communities.

What are the benefits to the recipient organization?
Planned gifts are often the biggest gifts an organization receives. And conversations about planned gifts can deepen an organization's relationship with its donors. Planned giving on the whole represents a large and untapped source of gifts for charities.

How does it work?
Some donors list a charity in their will without alerting the organization. In other cases, planned gifts emerge out of conversations between donors and organizations. Planned giving may require that donors seek advice from a lawyer or financial planner. An organization may likewise need to seek professional advice on how to manage and record planned gifts.

Do I need to be an expert to ask a donor for a planned gift?
No! A board member or volunteer does NOT need to be an expert to talk about planned giving with a donor. And rest easy, you should never offer legal or financial advice. The most important thing is to get the conversation started and spark the donor's connection to FHL's vision.

PLANNED GIVING GLOSSARY

Annuity: a contract to pay a fixed sum of money to an individual at regular intervals.

Appraisal: a professional assessment of the value of a piece of property.

Beneficiary: the recipient of a gift.

Bequest: a transfer of property or cash to an individual or organization through a will or estate plan. The most common type of planned gift.

Charitable gift annuity: (CGA) a gift contract that provides one or two beneficiaries with fixed income for life in exchange for a donation to a charity.

Charitable remainder trust: (CRT) a tax-exempt, irrevocable trust that pays income to a donor or other beneficiaries for a set term—either life or a designated number of years. At the end of the term, the remainder of the trust is donated to the designated charity.

Charitable lead trust: (CLT) an irrevocable trust that pays income to a charity or charities for a set period of time. At the end of that time, the remaining assets are distributed to the donor or other beneficiaries.

Codicil: like a legal "P.S." to your will. A codicil amends a previously executed will.

Estate tax: a federal tax on the value of property held by an individual at her or his death. This tax is paid by the estate, not the heirs or recipients of bequests. (FYI, Alaska does not levy a state inheritance or estate tax.)

Executor: the person named in a will to administer the estate.

Fair market value: the price that an asset would bring on the open market.

Intestate: dying without a legal current will or living trust.

Life income gift: a planned gift that makes payments to the benefactor and/or other beneficiaries for life or a term of years, then distributes the remainder to charity.

Revocable living trust: a legal document created during a donor's life that outlines how assets will be transferred after the donor's (the trustor's) death. Like a will, a revocable living trust can be changed during the trustor's life. Unlike a will, a living trust transfers property outside of probate court.

Personal property: securities, artwork, business interests, and items of tangible property as opposed to "real property" (see below.)

Probate: the review or testing of a will before a court to ensure that the will is authentic and the estate is distributed properly.

Real property: in essence, real estate. Real property also includes ownership and usage rights that accompany real estate properties.

Testamentary trust: a trust established in accordance with instructions contained within a will. A named trustee is responsible for managing and distributing the trustor's assets to the beneficiaries as directed in the will.

Testator: the person making the will.

Trust: a legal entity created by a written agreement to hold and invest property for the benefit of the grantor (an individual who transfers assets into the trust) and/or other beneficiaries (such as heirs and organizations).

Trustee: the person or organization who carries out the wishes of the person who established the trust.

Security: a financial asset that can be sold (e.g., stocks, bonds, and mutual funds).

Split-interest agreements: an interest in an asset that is split between the organization and the donor (or another non-charitable beneficiary), e.g., charitable lead and remainder trusts.

PLANNED GIVING & THE FRIENDS OF THE HOMER LIBRARY MISSION

The mission of the Friends of the Homer Library is to provide volunteer support for Library programs and services, to raise funds that enrich the Library experience, and to promote the use and enjoyment of the Library.

This mission embraces many things people value in their lives and in society at large:

Books

Community

Lifelong learning

Equality & equal access to information

Youth

Democracy

Civic life

Literature & the arts

Public/private partnerships

The high value placed on these things, coupled with FHL's enduring presence at the center of the community, makes FHL a strong candidate for planned gifts. And the organization has numerous assets to leverage when it comes to reaching prospective donors and getting the word out about planned giving.

PLANNED GIVING & THE BOARD OF DIRECTORS

Boards work best when members know what is expected of them. The Board should play a central role in organizational fundraising, including taking the lead as donors themselves, identifying prospects, building relationships, figuring out who to ask, asking, and thanking. Board members can plug into this process in different ways. Not everyone will know many donor prospects. Not everyone needs to ask. But each member can play a role. And often it is more powerful for a board member to ask a prospective donor for a gift than for a staff member to do the asking. The staff member's salary may depend on it. The board member's doesn't!

Planned giving efforts should emerge from the Board, and ideally from a team within the Board that is tasked with leading this effort. The team should ensure that regular time at board meetings is reserved to talk about planned giving topics, such as how to identify the corps of loyal FHL supporters, how to leverage Library assets to get the word out about planned giving, as well as questions or confusion around the topic, etc. This will help ensure that the whole Board is apprised of the planned giving program and that planned giving becomes integral to all of the organization's fundraising and outreach.

PLANNED GIVING—WHY NOW?

According to CharityNavigator.org, over the next two decades, Baby Boomers will leave behind $30 trillion in assets. This is the largest transfer of wealth in human history and an enormous opportunity for philanthropy.

More immediately, the Covid-19 pandemic has spurred many people into financial and estate planning. According to the AARP, fear of the virus is driving many people to write wills. And, because of Covid-19 social distancing requirements, many states have relaxed laws around estate planning such as allowing remote online notarization.

And while the pandemic has caused great financial hardship for many people, according to the *Chronicle of Philanthropy,* nonprofit organizations report that donors are showing increased interest in nearly all type of planned giving. The gravity of the crisis is inspiring donors to contemplate the role that nonprofit organizations will play in their legacies.

Additionally, the pandemic has created opportunities to talk about the bigger picture of financial health, sustainability, and literacy. This crisis is spurring conversations about equality, women's financial roles in their families, how to be proactive with financial planning, and financial education. A livelier conversation about financial issues provides more opportunities to talk about planned giving.

The Covid-19 pandemic is also showcasing the central role the Homer Public Library plays in our community in responding to crisis. Over the past nine months, the Library has provided free food, offered loaner computers, and broadcast outdoor WIFI—these are functions that make the Library even more central to the community than ever before. The Covid-19 crisis will not be the last challenge this community faces. And the Library will likely continue to play a central role in responding to challenges that lie ahead.

THE ABUNDANCE MINDSET

Sometimes when people first get involved in fundraising, they worry that there's not enough resources to go around. *The donors are being asked too many times. We're competing with other groups for donors and funds. We're annoying people by talking about what our organization needs.* This is known as the "scarcity mindset," and it's neither accurate nor helpful when it comes to fundraising. In reality, there are abundant resources to go around. Donors appreciate being asked to join in worthwhile causes. And fundraising done thoughtfully is still relatively rare.

It will be important to embrace this "abundance mindset," especially when it comes to working with the Library Advisory Board, which may also launch a planned giving program. The distinction between the missions of FHL and the LAB will not be clear—or relevant—to most donors. And the public will likely be confused if there are two planned giving programs coming out of the library. The FHL and the LAB should think from the get-go about how to collaborate on planned giving efforts to help do what's best for the library and the community.

BLUEPRINT OVERVIEW

The goal of this Blueprint is to provide the outline for a from-scratch planned giving program.

The Blueprint starts with the fundamentals and then offers a continuum of activities from passive to active to elevate the planned giving efforts. The FHL Board can use the Blueprint to develop a workplan that outlines specific actions to be taken that are tied to timelines and lead volunteers.

It's possible to carry out the bulk of this work without paid staff. Many free resources exist online, including sample policies and plans. So, there's no need to reinvent the wheel. And professional help and training can be called in when needed.

Start small. Get the fundamentals in place. Set realistic goals. And go!

STEP 1: BEGIN AT HOME

All good fundraising begins closest to the organization. In the case of the FHL, that means the Board. Before turning to donors, prospects, and the community at large, the FHL board should look within and begin the process themselves.

Make a case.
At an upcoming board meeting, 20 minutes should be set aside for board members to figure out their own case for FHL. *Why FHL?*

Here's how: One board member can hand out paper and pens and set a timer for five minutes. The lead member instructs the board to answer the question: Why do I support FHL? The lead encourages the board to not worry about grammar, spelling, or writing perfect sentences. The goal is to write from the heart about what connects you to the work and mission of FHL. This could be about the lasting impact of a book you read as a child. It could be about finding community at Library events. It could be about witnessing an aha! learning moment in the children's Library. What is important is that this case is personal and specific.

Take 10-15 minutes or so to share elements of these cases with each other. Now every board member has a specific, personal case of why she or he supports the FHL. These case statements can be used as the basis of fundraising materials (e.g., solicitation letters) or simply be the story board members share with others as part of their roles as emissaries and fundraisers at FHL.

Make a gift.
It's much more effective to ask donors to join you in supporting the FHL than to ask them to do something you haven't done yourself. In addition, it's important to many funding organizations (especially the Rasmuson Foundation, Alaska's largest private foundation) that 100% of the board gives. Each member should make an annual gift that is meaningful to them.

Here's how: Board members should agree on one meeting a year when members renew their financial commitment to the organization. One board member should be responsible for ensuring that this happens, including carrying out any necessary follow-up and thanking board members. (If the board doesn't want to dedicate meeting time to this, the lead board member should call each member individually during the designated time period to ask for a specific gift.)

<u>Board members should make their own planned giving commitments to the organization.</u>
Not only will this enable board members to ask others to join them in making a planned gift, giving the board a chance to lead by example, but this will educate them in the process of planned giving in a hands-on way.

STEP 2: GETTING THE FUNDAMENTALS IN PLACE

Planned Giving Team
The Board should recruit a team of three to five members, staff (as available), and ad-hoc community volunteers to form a planned giving team (PGT). This team will take the lead in developing and carrying out a planned giving plan. In an ideal world, the PGT would be made up of people with experience in fundraising, estate planning, and record-keeping. In reality, it's more likely that this team will be a group of people who are passionate about FHL, willing to learn, and capable of follow-through.

When recruiting from outside the board, it's usually best to ask for a specific, finite commitment rather than participation in an ongoing committee. ("*Would you join our Planned Giving Team? We'll meet monthly for 12 months with the goal of getting a planned giving plan and fundamentals in place. Your role would be to…")*

Planned Giving Plan
Using this Blueprint as a guide, the Planned Giving Team can begin developing a plan that identifies SMART (Specific, Measurable, Attainable, Relevant, and Time-bound) goals, as well as actions needed to reach those goals. With planned giving, the goals should not be numbers of dollars raised that year, but instead should outline the work needed to get a planned giving program in place, the number of donors reached, etc. See the sample SMART Workplan in the Appendix 1.

Planned Giving Budget
The PGT should think about the size of budget needed to get the first year's work done. *Do team members need training? Would consultation with a local lawyer be helpful? What about production of materials? Lunch or coffee meetings with donors?* It often takes money to make money, so make sure you budget adequately.

Planned Giving Case Statement
This case statement is an appeal for support for FHL but has a stronger emphasis on the future vision of the organization than a general fundraising case statement. What is the future direction of the FHL? The case statement will contain the central language that is then tailored for different publications, such as a brochure and the website. It should include:

An engaging title that is the "brand" of the planned giving program (e.g., "Heart and Hearth for Years to Come" or "Libraries are Forever.")

The mission and major activities of the FHL.

The future vision of FHL.

The impacts of planned gifts.

How people can learn more about planned giving opportunities at FHL.

Planned Giving Policies

Before delving too far into any kind of individual donor fundraising, it's important to get some policies in place. For additional information, see policy resources in Appendix 3.

Gifts acceptance policy: This policy outlines the guidelines an organization adheres to when contemplating acceptance of a donation. *Would you accept donation of a book collection of unknown value? A remote cabin? An eroding bluff property?*

Donor recognition policy: This policy outlines how an organization recognizes different kinds of donations. *Who is responsible for thanking donors? For a $500 gift, do you send a letter or make a phone call? For a $5,000 gift? How quickly will you respond? What are your donor categories? How is each recognized? And what are benefits of each?*

This policy should recognize a special category of donors: those who make planned gifts. Many organizations have a specific name for these donors—e.g., Legacy Society, Benefactor's Circle, or another name. To recognize these donors and highlight the planned giving program, these donors should receive special, enduring recognition at the Library.

Investment policy*:* This policy outlines how an organization stewards its assets. *What will you do when a $50,000 bequest comes in? What about a life insurance policy?* Investment policies can be complex, but there are resources to help. (See Appendix 3 for some of them.) Some people assume that all planned gifts should be invested in an endowment fund, but organizations—especially small ones—should think carefully about locking up assets that could be invested in the mission and used to reap dividends in ways without similar restrictions.

Administrative Procedures

Good fundraising requires good record keeping. This need not be an expensive database, but the PGT and the Board at large should decide how, where, and by whom donor records are kept. This system should include records of past donations; alternate ways to identify donors and prospects; actions needed for each donor; a tag for which person is responsible for following-up; and a reminder system for follow-up. There should also be a paper filing system that includes records of potential and confirmed planned gifts. And you'll need adequate financial recording of planned gifts.

Planned Giving Materials & Messages

In order to spread the word about the FHL's planned giving program, planned giving information should be incorporated into all FHL materials, including the newsletter, e-newsletter, website, and all other communications. In addition, specific materials should be created about the planned giving program. Stick with the branding/slogan you came up with in the case statement.

Incorporate planned giving information into all print materials**:**

A simple tagline at the bottom of each newsletter can get readers thinking about planned gifts.

Interested in leaving a legacy of books and learning in Homer? To learn more about how to support the Friends of the Homer Library in your will, email…..or call….

Donation forms should include a checkbox where people can indicate that they have already included the FHL in their will. In addition, periodic articles about the financial planning resources available at the Library and through FHL programs as well as about specific planned giving topics will help the community learn more about the planned giving program.

Incorporate a planned giving message into every FHL event**:**
During introductions at FHL events and programs, FHL board and staff should incorporate a simple planned giving message. Always ensure participants know how they can learn more.

Incorporate planned giving information into the FHL donation webpage**:**
Add a check-box on the donation page where people can indicate their interest in receiving information about planned giving. This check box should alert the PGT to follow-up with the donor.

☑ *I'd like information on how to leave a legacy of books and learning by supporting the Friends of the Homer Library in my will.*

At the conclusion of the online donation experience, provide a hyperlinked option for people to be directed to the planned giving page (see below). And, of course, include some inspirational photos of the Library and patrons of all ages.

I'd like to learn more about how my gift can help ensure the future of the Library.

Create a separate page about the planned giving program: Build off the brand developed in the case statement. Be sentimental rather than technical, focusing on the organization's mission and the impacts of legacy gifts. Provide a way for donors to express their interest (and provide their contact information) so that the PGT can follow-up. And include a photo of an FHL planned donor and a brief success story (see below.) See sample webpage language in Appendix 2.

Write success stories: Gather success stories to highlight FHL donors who have already made planned gifts. A friendly photo should accompany each story. If you don't yet have a planned giver, start with the Board!

Develop a planned giving brochure:
This can include largely the same language as the webpage, and again, will build off the brand created in the case statement. Include an abbreviated version of the case statement, basic planned giving information, contact information for donors and prospective donors to use to reach out for more information, success stories, and inspiring and heart-melting photos. Distribute the brochure at the Library, at events, and wherever else you come in contact with Library users and donors.

STEP 3: OUTREACH & EDUCATION

You have your fundamentals in place. Now is the time to work actively to get the word out and meet prospective donors.

Leverage Library assets and platforms:
The Library is an incredible asset in Homer—a wonderful space, a place where thousands of people walk through the doors each year, a font of information, the location of billboards seen by a large section of the community, an inspiring location to meet, etc. Explore how you can leverage these assets to help meet planned giving goals. For example:

Website: Explore how the Library website can drive visitors to the FHL website. Is there an opportunity to add a "Support the Library" link on the Library website?

Events: One of the biggest barriers to planned giving is that donors haven't written wills or completed estate planning. The FHL could build off the workshops you've already carried out to consider making the Library the center for financial literacy in Homer through regular public events on the topics of financial sustainability, how to retire, writing wills, etc. This would help meet the lifelong education mission of the FHL and be a natural avenue for getting the word out about the planned giving program and meeting prospective donors. And the broader focus of "financial literacy" or "financial planning" would engage audiences beyond those people for whom the idea of "estate planning" resonates. Consider carrying out a year-long financial literacy campaign to highlight these efforts. This might include radio programs, invited speakers, etc.

Note: An important consideration is that an increasing number of people are turning to online services (e.g. FreeWill.com, Legal Zoom, Rocket Lawyer, etc.) for inexpensive loan-writing assistance. FHL should think about what role the organization could play in facilitating people through this process. Can FHL help people understand the differences between these online services? Can FHL provide programming for kids that will serve as childcare while parents attend a workshop? Can FHL provide access to a printer and notary so that people can complete their wills during a workshop? Consider workshops such as:

How to write a will FAST AND FOR FREE: A workshop for busy parents

Financial health for families: A workshop for moms (N.B., Women often learn better from women teachers and surrounded by fellow participants who are women.)

This kind of programming could help FHL connect to new constituencies, educate community members about the planned giving program, and provide an avenue for FHL to follow-up with these individuals to cultivate them as donors.

Materials: Is there an opportunity to add planned giving information to Library materials, e.g. book receipts? Can FHL secure a small bit of real estate at the Library for a "financial literacy center"? This could be a kiosk where people can learn about tools for financial planning, will-writing, etc., and of course, the planned giving program.

Leverage partnerships:
Whom can you partner with to help reach your planned giving goals and donors' needs and goals?
Current Donors: Current donors with planned gifts of their own can be your best advocates when talking to donors about making planned gifts.
Library Advisory Board: It will be confusing to the public to see two different planned giving programs from the library. How can you collaborate?
Homer Foundation: How can a partnership with the Homer Foundation help the FHL reach planned giving goals?
Local attorneys: Explore partnerships with local attorneys to offer estate planning workshops (as you've already done) and to offer services at a discount to clients who sign up through FHL.
Online will service: Explore a partnership with an online will-writing service. FreeWill.com (with whom the Seattle Public Library Foundation partners, for example) enables people to create or update their wills in about 20 minutes for free. Nonprofits pay a fee for the partnership.

Leverage social media:
Use social media platforms to broadcast planned giving success stories, advertise events, educate people about aspects of financial literacy, and elevate the profile of FHL.

Meet your prospects and stakeholders where they are:
Where do community-minded people who may be thinking about financial planning spend time? What do they read? What are they listening to and watching? Saturate the community with messages about the planned giving program and appeal to donors' sense of self—*What is your legacy?* Get FHL's planned giving message out in front of prospects through:

FHL events and programs

Other nonprofit organizations and clubs (e.g. Rotary, etc.)

Senior Center

Pickleball clubs

Book clubs

Medical offices

Radio programs and sponsorships

Boosted social media posts

Homer News

Personalized letters

Follow up. Follow up. Follow up.
Capture contact information at events, through door prizes or just by passing around a contact sign-up sheet. (Always make sure that a few people have entered their full contact information at the top of the sheet to encourage others to do the same.) Then rigorously follow-up to steward new donors.

STEP 4: WORKING WITH DONORS

A successful planned giving program depends on a successful individual donor program, as planned gifts are most likely to come from existing, loyal donors. A successful individual donor program involves doing four things:

Identify prospects.

Cultivate donors.

Ask.

Thank.

Identifying prospects

The best way to identify prospects is to think about concentric circles. At the center is the organization—your Board, staff and loyal donors. This is "home," and once again, it's the best place to start. According to Target Analytics, loyal giving is a better predictor of whether a donor will make a planned gift than size of the donor's annual giving. In fact, some organizations have received million-dollar bequests from donors who have loyally given only $25 or $50 for years. As you move beyond the center of your circles, you'll find shorter-term annual donors, frequent program participants, and those aligned with the mission of the FHL. These individuals should be cultivated to become loyal donors and planned gift prospects.

With planned giving, age is another important consideration. A 2016 study by Pentera and the Lilly Family School of Philanthropy showed that the likelihood of a donor making a planned gift increases sharply at age 50. But in order to be top of mind to a prospective donor in her or his 50s, you should recruit and cultivate donors in their 40s or even younger.

As mentioned in Step 3, the FHL should continually work to connect with new people—through events, programs, etc. These people should be "brought into the fold" of FHL so that they can be cultivated and asked to support the FHL. Throughout this process, keep in mind, you may have donors who are thinking about putting FHL in their will, or already have, but who have not yet informed the organization.

Cultivate

Develop a Donor Cultivation Plan. This plan outlines how FHL builds relationships with prospective donors, turning someone who has never contributed to the organization into a loyal supporter excited about making larger gifts. This plan could be a professionally-produced one or a one-pager the Board comes up with.

Focus on deepening the connection with your donors, building the relationships through increasingly personalized contact (e.g., e-newsletters to hand-written thank you notes to phone calls to in-person visits.)

Ask

People are often terrified of this part of fundraising. But it doesn't have to be scary. Training and practice can turn someone frightened of the process into someone who feels charged up by it.

The first question when planning an ask is: who should do the asking? The right person to ask is the person who is comfortable asking. It's often someone who is a peer of the donor. Sometimes a team approach is best.

Do your research. You'll need to know the donor's past support for the organization and a sense of their financial situation.

Plan an ask that works for the donor's schedule and needs. This might be a phone call or an in-person visit.

The most important thing is to ask the donor and then stop talking. (People often find it difficult to not fill in the silence.)

Would you consider leaving a bequest in your will to FHL?

Most people are flattered when asked thoughtfully for a donation.

Thank

This is one of the most important elements of fundraising. Make sure you do it swiftly and thoughtfully—as guided by your Donor Recognition Policy.

With planned gifts, the ask is often just the beginning.

It's likely that a request to a donor for a planned gift with really just be the beginning of a conversation. You'll need to consider:

Getting expert input

Your donor may already have a trusted attorney, financial advisor or tax advisor. But be ready to offer contact information of an attorney or other expert that your donor can turn to for additional information. Likewise, the organization may need to consult an attorney or other expert.

Follow up

Make sure you diligently follow-up with the donor to get a planned gift commitment.

See additional resources on fundraising in the Appendix 3.

STEP 5: LIFE STORIES CAMPAIGN

You have your planned giving team in place, your materials produced and updated. You've held outreach events and met with individual donors about making planned gifts.

How can you take this work even farther?

One way is to plan a campaign that will help FHL build deep connections with individuals who are later in life and steward these relationships to reach planned giving goals.

Here's a story: A nonprofit animal shelter in the Seattle area was in dire need of new people to adopt pets. They noticed that many of the people who adopted animals from the shelter were older, and that many of them had recently experienced the death of a spouse. Rather than wait around for prospective adopters to walk in the door, they decided to seek them out, and scanned the obituaries for information about the newly widowed. The shelter reached out thoughtfully to these people, beginning a relation that ended up being a win-win-win beyond the organization's wildest dreams: The shelter met its mission by placing animals in loving homes. Adopters experienced the companionship and comfort of a pet. And the organization built relationships with a population they could steward as donors and from whom they could identify planned giving prospects.

A Life Stories Campaign would be a chance for FHL board members or other FHL volunteers to connect with individuals who are later in life to collect "life stories" from them through in-person interviews. The individual would be asked to recall a specific life event, or answer a standard set of oral history questions: *What is one moment in your life you're proud of? What was your greatest challenge as a child?* Likewise, these interviews could focus solely on the role of books and libraries in the lives of community members. *What is one book that has impacted your life and why? What role did libraries play in your childhood?* (In this case, perhaps the effort would be called the "Stories of Our Lives" Campaign.)

These stories could be preserved digitally and shared publicly (perhaps through a digital Library kiosk where people could see or hear excerpts).

This project would be a win-win-win. FHL would make a deep connection with individuals who are later in life. Interview subjects would get a chance to share aspects of their lives with others in an affirming way. And the public would learn from and enjoy these life stories.

A Life Stories campaign would also help the FHL reach lifelong learning and humanities goals, making the project a good candidate for grant funding.

CONCLUSION

Libraries are fundamental to our democracy, to equal access to information, and to the civic life of our communities. The Homer Public Library is one of Homer's most beloved and essential assets. It serves patrons of all backgrounds, helps a diverse population meet a diverse set of needs, and responds to community challenges and opportunities.

The Friends of the Homer Library helps the Library reach deeply into our community through programs, events, and services. Together, the FHL and the Library promote values held dear in our community and our society: lifelong learning, literature and the arts, affordable access to books, empathy, and liberty. Some would argue that these things are needed now more than ever before. And in the years to come, the FHL will continue to play a critical role in the Library's ability to serve the community with resources and programs.

This Blueprint can guide the FHL in setting up a planned giving program from the ground up. It's not rocket science. You don't have to be an expert to make a plan, you don't even have to be an expert to ask for a planned gift.

You just have to begin—and the best time to begin any fundraising effort is NOW.

Appendix 1: SMART Workplan

A SMART Workplan includes goals and specific actions that are tied to deadlines and leads.

GOAL	ACTION	DEADLINE	LEAD	STATUS
Recruit Planned Giving Team	Ask BOD members to volunteer at next meeting	1/15/20	Joy	Not done
	Call Loyal Donor X to see if she'll join team	1/15/20	Andy	Not done

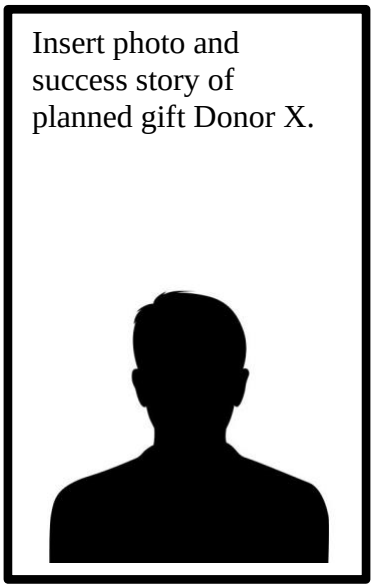
Appendix 2: Sample Planned Giving Webpage Language

Libraries Are For Everyone. Libraries Are Forever.

Leave a legacy of books and learning in Homer by making a planned gift.

☑ I'm interested in learning more about planned giving at FHL. (*The goal here is to capture the individual's contact information so that the PGT can follow-up*.)

What is YOUR legacy?



You don't have to be a millionaire to leave a legacy in your community.

If you want to be part of the Library forever, you can leave a gift to FHL in your will.

Planned gifts help FHL *DO WHAT* (*example impacts of planned gifts…e.g., grow the Library collections, ensure funds for future programs, etc*.)

You can even make a gift to FHL when you create a will online.

Planned gifts often come with significant tax benefits, and enable donors to leave charitable legacies in their communities while meeting their financial needs.

Click here to learn about FHL's Legacy Society and ways to make a planned gift. (*Hyperlink to page below.*)

For more information, please contact XXX at (XXX) XXX-XXXX or XXX@XXXX.XXX.

Appendix 2 continued: Sample Webpage Language

Libraries Are For Everyone. Libraries Are Forever.

Legacy Society – Be part of the Library….FOREVER.

The Friends of the Homer Library Legacy Society isn't a bunch of stodgy millionaires. They're people like you, people who love books and the Library and who want to make a gift to the Library that will last forever.

Benefits include….*insert recognition/benefits language here.*

Types of Planned Gifts

Insert success story and photo of Donor X who made bequest to FHL.

Bequests

Bequests are charitable donations outlined in a will or estate plan. They are the most popular types of planned gift because they're flexible and easy to execute.

Benefits of a bequest include:

It costs you nothing today.

A bequest is free of federal and estate tax.

Your bequest can be changed later.

You can still benefit your heirs with specific gifts.

Your bequest could be a dollar amount, a percentage of your estate, or a specific asset (such as a vehicle or property). A bequest can also be made from the remainder of your estate or what is left of your assets once all gifts have been made to your heirs.

You can include a provision in your will that looks like this:

I give to Friends of the Homer Library, an Alaska nonprofit organization that is recognized as exempt from tax under Section 501(c)(3) of the Internal Revenue Code, with its principal office located at 500 Hazel Avenue, Homer, Alaska 99603, $____/XX percent of the total value of my estate to be used for its general purposes. Tax # XXXXXXXXX.[1]

Other types of planned gifts: Charitable Annuities (*hyperlink*) Gifts of Plans and Policies (*hyperlink*)

Appendix 2 continued: Sample Webpage Language

[1] From www.Kleinandroth.com.

Charitable Gift Annuities

A Charitable Gift Annuity (CGA) is an investment in the future of the Homer Public Library. A CGA guarantees you income for life and allows the Library to invest your gift during your lifetime.

How it works:

A CGA can be established by someone 65 or older, with a gift of $10,000 or more.

The Friends of the Homer Library agrees to pay you a fixed payment every quarter for the rest of your life. This amount is guaranteed and will never change regardless of the economic climate.

A significant portion of this payment is tax free, and you can take a charitable deduction in the year you make the gift.

The remainder of your gift annuity is donated to FHL.

For more information, please contact XXX at (XXX) XXX-XXXX or XXX@XXXX.XXX.

Gifts of Plans and Policies

<u>Donate your retirement plan</u>

You can make a lasting gift to FHL using assets from qualified retirement plans such as a Roth IRA or 401K.

You can also designate FHL as the owner and/or beneficiary of a life insurance policy. Simply contact your insurance agent and ask for the appropriate forms.

For more information, please contact XXX at (XXX) XXX-XXXX or XXX@XXXX.XXX.

Appendix 3: Additional Resources

General fundraising resources:

The Foraker Group: An Alaska nonprofit organization that offers capacity-building training and services to nonprofits, including board trainings, fundraising consultations, and planned giving assistance.
https://www.forakergroup.org/

Grassroots Fundraising Journal: Free articles available online on a variety of fundraising topics.
https://nonprofitquarterly.org/grassroots-fundraising-journal/

Anything by Kim Klein: Founder of the *Grassroots Fundraising Journal* and a fundraising consultant and trainer, she takes a no-nonsense approach to fundraising.
https://www.kleinandroth.com/

Chronical of Philanthropy: A subscription journal available online that covers a range of fundraising topics and trends.
https://www.philanthropy.com/

Amy Eisenstein: A fundraising trainer based in New Jersey who offers a number of free resources online.
https://www.amyeisenstein.com/

Policy resources:

Foraker Resources, including sample fiscal policies
https://www.forakergroup.org/resources/

Sample United Way chapter planned giving, gifts acceptance, and endowment policy
https://www.wapellocouw.org/sites/wapellocouw.org/files/UWWC_Planned%20Giving%20Policy_Adopted%2006_09_2009.pdf

National Council of Nonprofits: A resource and advocacy organization with numerous tools and information available for free online.
https://www.councilofnonprofits.org/tools-resources/investment-policies-nonprofits
https://www.councilofnonprofits.org/tools-resources/gift-acceptance-policies

Local attorneys:

Lindsay Wolter:
(907) 235-2717
Lindsay@homerlaw.net

Terri Spigelmyer:
(907) 235-1007
Terrispigelmyer@gmail

The very existence of libraries affords the best evidence that we may yet have hope for the future of man.
T. S. Eliot

Help secure our future.

Friends of Homer Library
https://friendsofthehomer
publiclibrary.wildapricot.org

Library Endowment Fund
www.homerf[62]ation.org/
give-now

CITY OF HOMER
HOMER, ALASKA

LAB / City Manager

RESOLUTION 06-06

A RESOLUTION OF THE HOMER CITY COUNCIL APPROVING AND ADOPTING A MEMORANDUM OF UNDERSTANDING BETWEEN THE CITY, THE LIBRARY ADVISORY BOARD, AND THE FRIENDS OF THE HOMER PUBLIC LIBRARY REGARDING FUNDING AND OPERATIONS OF THE NEW LIBRARY.

WHEREAS, The new Homer Public Library is currently under construction and is scheduled for occupation in August or September of 2006; and

WHEREAS, The City, the Library Advisory Board, and the Friends of the Homer Public Library previously entered into a Memorandum of Understanding which was focused upon fund raising and construction activities for the new library; a partnership and working relationship that has proven to be very successful; and

WHEREAS, The Library Advisory Board and the Friends of the Homer Public Library believe that now is the right time to have a discussion about the roles and responsibilities of the parties regarding future funding and operations of the new library and that a new Memorandum of Understanding would be beneficial in order to cooperatively advance the common goal of providing excellent library services; and

WHEREAS, The new Memorandum of Understanding is intended to build upon the partnership established in the previous MOU and to clearly identify the broad roles and responsibilities of the parties in one document so that the relationship is clear to the public, granting agencies, foundations, and other potential donors; and

WHEREAS, Although the specific roles and responsibilities of the City Council and the Library Advisory Board with respect to the library are defined in the City Code, the Council agrees that there are benefits associated with adopting an MOU and in particular, with clearly defining the relationship between the City and the Friends of the Homer Public Library.

NOW THEREFORE BE IT RESOLVED, That the Homer City Council hereby approves and adopts the Memorandum of Understanding between the City, the Library Advisory Board, and the Friends of the Homer Public Library, a copy of which is attached and incorporated herein, and authorizes the City Manager to execute the appropriate documents.

PASSED AND ADOPTED by the Homer City Council this 9th day of January, 2006.

CITY OF HOMER

JAMES C. HORNADAY, MAYOR

ATTEST:

MARY CALHOUN, CMC, CITY CLERK

Fiscal Note: NA

MEMORANDUM OF UNDERSTANDING

New Library

November 9, 2005

PREAMBLE

In the wake of a successful fundraising campaign and voter demonstrations of public support, the community of Homer is in the initial stages of building a new library. According to current timetables, the new Homer Public Library is scheduled to open in the summer of 2006, and with the new facility comes new challenges and opportunities. The roles and responsibilities of relevant parties need to be reaffirmed, re-assigned or assigned, as appropriate. This document builds upon by reference the previous agreement between the same parties dated October 23, 2003, and acknowledges the Trust Agreement dated May 20, 2004 between the Friends and the Homer Foundation.

ARTICLE 1: PARTIES

This agreement is between the Friends of the Homer Public Library ("Friends"), a 501 (c) (3) charitable corporation organized under the laws of the State of Alaska, the City of Homer ("City"), and the Homer Library Advisory Board ("LAB"), an advisory board established by City code.

ARTICLE 2: PURPOSE

The purpose of this memorandum is to establish the relationship and duties of the parties in regards to program development, fundraising and public recognition of donors, advocacy efforts, and use of the new Homer Public Library building and grounds.

ARTICLE 3: DUTIES OF THE CITY

A. STAFFING AND MAINTENANCE

It is understood by the parties that the City Council has sole authority with respect to maintenance, staffing, and operations of the library.

B. LIBRARY STAFF RESPONSIBILITIES

1. The Library staff, under the leadership of the Library Director, shall be responsible for creating and/or approving the annual program of the Library, including all core professional activities, public programs, and other public activities held in the Library facilities.

2. The Library staff is responsible for the safety and security of the facility and its operations under the codes and ordinances of the City of Homer and the Homer Public Library Policy Manual.

3. The Library staff will have final authority over facility use, after-hour availability, and the accompanying requirements of responsibility, safety, and security.

C. FISCAL MANAGEMENT AND ACCOUNTING

Notwithstanding the provisions in previous agreements, it is generally established that the debt retirement and maintenance and operations costs shall be incorporated in the annual City budget.

D. RESPONSIBILITY FOR EXHIBITS, DISPLAYS, AND USE OF LIBRARY BUILDING AND GROUNDS FOR NON-LIBRARY FUNCTIONS

The City shall adopt policies regarding the following, after policy development by the LAB addressing such issues as:

1) Space allocations for the displays of works of art, public information and notices, promotion of the activities of the Library, LAB and Friends, and general guidelines for the use of unallocated or non-designated interior and exterior surfaces;
2) Space allocations and guidelines for displays and exhibits located on the Library grounds and pathways;
3) A free speech statement;
4) Duration of displays;
5) Process for the selection of temporary and revolving exhibits and displays;
6) Public use of the library building and grounds for non-library functions; and
7) Such other related issues as may arise in the course of policy development.

E. PUBLIC PARTICIPATION

Except as required by City Code, the City shall refer library–related issues to the LAB for community input and advice.

ARTICLE 4: DUTIES OF THE FRIENDS OF THE HOMER PUBLIC LIBRARY

The Friends' general purpose is to engage in supplemental activities which encourage public use and enjoyment of Library services and facilities, focus public attention on Library needs, and assist in the raising of funds, donations, endowments, and bequests for the Library. There shall be no transfer of Friends' funds to the City for ordinary operational costs or reliance by the City on the Friends for operational funding.

A. ENDOWMENT FUND

The Friends will undertake various activities to further develop and grow the Friends of the Homer Public Library Endowment Fund.

B. TAX EXEMPT STATUS AND ACCEPTANCE OF FUNDS

The Friends agree to fulfill their obligations of documenting, accounting and reporting the contributions made to them for the library building fund. The Friends further agree to transfer to the City those funds that have been donor designated for capital projects.

C. PROGRAM DEVELOPMENT

The Friends seek to conceptualize new or expanded public programs for the Library and provide volunteer assistance in executing the adopted programs. The Friends agree to follow a formal "program proposal" form provided by the Library staff when considering adoption of new or expanded programs.

D. POLICY ISSUES AND RELATIONS WITH THE CITY OF HOMER

The Friends will defer consideration of policy matters and Library relations with the City of Homer to the LAB, being assured full access to the regular meetings of the LAB to express concerns or appreciation for Library activities and/or City of Homer relations with the Library.

E. BUDGET

The Friends will create, and distribute to any interested party, an annual budget that sets forth its projected revenues, including those derived from fundraising, donations, and its endowment, together with the projected costs for programs, materials, equipment, labor and endowment growth. The Friends shall consult with library staff before making purchases for the library in the interest of coordination and reviewing any possible downstream costs that might result.

F. CAPITAL CONTRIBUTIONS

The Friends may choose to make capital contributions and will consult with City staff and LAB before making purchases for the library.

ARTICLE 5: DUTIES OF THE LIBRARY ADVISORY BOARD

The LAB, functioning as a sitting board representing the interests of the citizens of Homer and the surrounding region, is designed and constituted to provide the City with recommendations that have been well debated and researched, while allowing for public involvement.

A. POLICY MATTERS AND RELATIONS WITH THE CITY OF HOMER

The LAB will fully and openly consider policy matters regarding the Library and will make recommendations to the City of Homer. Central to the LAB deliberations are such issues as community standards, professional practices, and advocacy for the Library. The LAB will also assume responsibilities as may be delegated to it by the City.

B. FUNDING MATTERS

The LAB reviews the annual budget proposal for library operations and makes policy recommendations that affect those budgets. Per its bylaws, it may also solicit donations for the benefit of the library. The LAB will organize appropriate committees and draft future agreements as the need for capital campaigns arise.

ARTICLE 6: POLICY OF PUBLIC ACKNOWLEDGEMENT

The parties herein agree, except as otherwise described in a plan adopted by the Homer City Council, to refrain from entering into any agreement or contract that would require the dedication or naming of the library building, its rooms, and or grounds. Permanent donor recognition in and around the new facility is presently limited to that agreed upon in the course of the capital campaign (Appendix A). Future acknowledgements (e.g. major donors to endowment) may be proposed to the LAB for recommendation to the city.

ARTICLE 7: GENERAL UNDERSTANDING, TERMINATION, AND AMMENDMENTS

This MOU constitutes a general understanding by the parties about their respective roles and responsibilities regarding the new Homer Public Library. The parties have entered into this agreement in good faith and fully intend to carryout the responsibilities described herein. The parties understand and stipulate that this MOU is not a legally binding document and do not intend it to be. In the event that any provision of this MOU conflicts with the Homer City Code, the code shall prevail.

Any party to this agreement may terminate with or without cause by providing 60 days notice in writing. Reasons a party might want to terminate would be if one of the parties ceases to exist, or one of the parties may no longer want to be a part of the partnership.

This MOU may be amended by written agreement signed by all parties. Amendments may be proposed by any party.

Agreed to by the following parties:

Friends of the Homer Public Library

Sta Shank
President

Date: 12-15-05

Homer Library Advisory Board

Chair

Date: Dec. 6, 2005

City of Homer

_____
Mayor

Date: _____

APPENDIX A

Donor Recognition Opportunities as approved by the Capital Campaign Committee

Pioneer Wall
A glass wall etched with the names of "pioneer" donors will be located at the entrance of the new library. Pioneer donors are those individuals, businesses/corporations, foundations and agencies who gave $6,000 or more to the New Library Project building fund. The glass wall will include the donor names listed chronologically (by date of gift), and all names will be of one size.

Fish
Beginning with the 2004 Fall Pledge Drive and extending until building completion, donations are being raised for the building fund by the Friends by "selling" copper fish. The fish are created by Mooserun Metalsmiths and will be displayed on a metal panel (similar to a garden screen) along the walkway to the new library.

Donor and Documentation Book
A local artist will be contracted by the Friends to create a hand-made book to be displayed in the new library (near the entrance). The book will contain the names of all donors and volunteers as well as photographs and other info documenting building construction, including its LEED elements. Documentation is the responsibility of construction management, and the artist will incorporate materials in an artful and accessible way.

Other Recognition
Certain areas of the new library (study rooms, window seats, etc.) are identified as donor recognition opportunities in a brochure designed to attract corporate and other large donors, for levels of giving from $12,000 to $100,000. Brass plaques (3" x 8") w ill read "In recognition of _____" or "In memory of _____." The plaques will be placed on or adjacent to the recognition areas and will be interfaced with the building materials.

City of Homer
www.cityofhomer-ak.gov

Homer Public Library
500 Hazel Avenue
Homer, AK 99603
library@cityofhomer-ak.gov
(p) (907)-235-3180
(f) (907)-235-3136

Memorandum

TO: LIBRARY ADVISORY BOARD

FROM: DAVID BERRY, LIBRARY DIRECTOR

DATE: JANUARY 27, 2021

SUBJECT: CHARGES FOR PRINTING AND PHOTOCOPYING

Last year, the LAB made changes to the fines and fees schedule. Boardmember Vernon has requested that the LAB examine the current schedule and consider increasing charges for printing and photocopying, so as to avoid undercutting private industry.

RECOMMENDATION

For discussion; any action taken by the board should be done in the form of a motion.

LIBRARY

Facility Use – Fees for after-hours private use (including building supervision):	
Conference Room	$50.00 per hour
Reading Lounge	$50.00 per hour
Children's Room	$50.00 per hour
Entire Facility (excluding staff work space)	$300.00 fee plus $50.00 per hour staff supervisor $300.00 damage/cleaning deposit
Library Cards	
Replacement Card	$5.00 per issue
Temporary Card	$25.00
Photo Copy	
Letter Size and Legal Size Per Side	$0.15 each
11" x 17" Per Side	$0.25 each
Color Copies – Letter Size and Legal Size per Side	$0.50 each
Color Copies – 11" X 17" per Side	$2.00 each
Interlibrary Loan Fee[1]	
Standard Size Books	$3.00
Photo Copy	$0.15 per page
Microfilm/Videos/CD's/Audios	$4.00
Replacement/Repair of Items[2]	
Lost or Damaged Items	Replacement cost plus $10.00 processing fee per item
Lost or Damaged Cases, Hang-Up Bags, Etc.	Replacement cost or $2.00, whichever is greater
Lost Map or Inserts	$10.00 per item
Lost Out-of-Print Items	$50.00 for Alaskana, or replacement cost if higher
Damaged Item	
Per Page	$2.00 per page
Book Jacket	$3.00
Cover Damaged Beyond Repair	Full bindery cost or full replacement cost plus $7.00 processing charge
Improper Return of Digital Devices	$25.00 if not returned to Front Desk staff

[1] Additional charges may be assessed.

[2] To receive a refund on a lost item, patrons must return the item within sixty days of lost status. Refunds of payment for items deemed valuable to the collection and returned after the 60-day period may be made at the discretion of the Director. No refunds will be given for digital devices.

Library Fees have been set by the following legislative enactments:

Ord 05-08	Reso 97-87	Reso 12-006	Reso 18-077A)
	Reso 98-86	Reso 13-076	Reso 20-065
	Reso 99-19(A)	Reso 14-114	
	Reso 03-87	Reso 15-097(S)(A)	
	Reso 04-98(S)(A)	Reso 16-109	

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Office of the City Clerk
491 East Pioneer Avenue
Homer, Alaska 99603
clerk@cityofhomer-ak.gov
(p) 907-235-3130
(f) 907-235-3143

Memorandum

TO: CITY ADVISORY BODIES

FROM: MELISSA JACOBSEN, MMC, CITY CLERK

DATE: JANUARY 26, 2020

SUBJECT: REPORTS TO COUNCIL

Mayor Castner has requested that the scheduled reports from Boards, Commissions, and Committees at the Council meetings be revised so that each group reports at the Council meeting following their regularly scheduled meeting.

A revised Council meeting attendance schedule has been prepared and will be included in your meeting packets.

RECOMMENDATION

Informational Only

LIBRARY ADVISORY BOARD
2021 Calendar

	MEETING	AGENDA DEADLINE	CITY COUNCIL MEETING FOR REPORT*	ANNUAL TOPICS/EVENTS
JANUARY	No Meeting			
FEBRUARY	Tuesday, February 2 5:30 p.m.	Wednesday, January 27 5:00 p.m.	Monday, February 8 6:00 p.m.	• Annual Review of Library Fees, Policies, Rules & Regulations (Bylaws V.2)
MARCH	Tuesday, March 2 5:30 p.m.	Wednesday, February 24 5:00 p.m.	Monday, March 8 6:00 p.m.	• Appointment/Reappointment Applications Due
APRIL	Tuesday, April 6 5:30 p.m.	Wednesday, March 31 5:00 p.m.	Monday, April 12 6:00 p.m.	• Terms Expire April 1st • Election of LAB Officers (Bylaws IV.1) • Celebration of Lifelong Learning; National Library Week, Library Workers Day, & Library Legislative Day
MAY	Tuesday, May 4 5:30 p.m.	Wednesday, April 28 5:00 p.m.	Monday, May 10 6:00 p.m.	• End of Student Representative Term (Bylaws III.2)
JUNE	No Meeting			
JULY	No Meeting			
AUGUST	Tuesday, August 3 5:30 p.m.	Wednesday, July 28 5:00 p.m.	Monday, August 9 6:00 p.m.	
SEPTEMBER	Tuesday, September 7 5:30 p.m.	Wednesday, September 1 5:00 p.m.	Monday, September 13 6:00 p.m.	
OCTOBER	Tuesday, October 5 5:30 p.m.	Wednesday, September 29 5:00 p.m.	Monday, October 11 6:00 p.m.	• Beginning of Student Representative Term (Bylaws III.2) • Library Card Sign-up Month
NOVEMBER	Tuesday, November 2 5:30 p.m.	Wednesday, October 27 5:00 p.m.	Monday, November 22 6:00 p.m.	• National Friends of Libraries Week
DECEMBER	Tuesday, December 7 5:00 p.m.	Wednesday, December 1 5:00 p.m.	Monday, December 13 6:00 p.m.	• Approve Annual LAB Priorities • Budget Meeting (Bylaws V.3) *may not be applicable during non-budget years

*The Commission's opportunity to give their report to City Council is scheduled for the Council's regular meeting preceding the Commission's regular meeting, under Agenda Item 8 – Announcements/ Presentations/ Borough Report/Commission Reports. Reports are the Commission's opportunity to give Council a brief update on their work.

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(f) 907-235-3143

Memorandum
Agenda Changes/Supplemental Packet

TO: LIBRARY ADVISORY BOARD

FROM: RACHEL TUSSEY, DEPUTY CITY CLERK

DATE: FEBRUARY 2, 2021

SUBJECT: SUPPLEMENTAL PACKET

STAFF & COUNCIL REPORT / COMMITTEE REPORTS

ii. 2021 Statistical Report

INFORMATIONAL MATERIALS

C. Homer Foundation Quarterly Report – April thru June 2020

D. Homer Foundation Quarterly Report – July thru September 2020

Homer Public Library Statistical Summary for 20 Date: 02-Feb-21

CIRCULATION	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Y.T.D.
Total # of Items	5,727												5,727
INTERLIBRARY LOANS													
Incoming (Borrowed)	0												0
Outgoing (Lent)	4												4
STUDY ROOM USE													
# of groups	0												0
# of people	0												0
MEETING ROOM USE													
# of groups	0												0
ATTENDANCE													
TOTAL (*Included)	601	0	0	0	0	0	0	0	0	0	0	0	601
*Story Hour & Lapsit	0												0
*School Classes	0												0
*Internet sessions	566												566
*Programs	35												35
OUTREACH													
# Visits	4												4
# People	20												20
NEW CARDS ISSUED													
City	11												11
Borough	2												2
Temporary	0												0
Reciprocal	0												0
VOLUNTEER HOURS													
# of people	13												13
# of hours	119.5												119.5
MATERIALS ADDED													
Books	382												382
Audio	9												9
Video	70												70
Serials	0												0
Electronic Resources	0												0
MATERIALS REMOVED													
Books	238												238
Audio	149												149
Video	38												38
Serials	0												0
Electronic Resources	0												0
REVENUES DEPOSITED													
Fines/Fees/Copies	0.00												0.00
Building Fund (151-)													0.00
Library Gifts (803-)													0.00
Endowment													0.00
Grants													0.00
TOTALS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	$0.00

Data not available yet or incomplete

HOMER FOUNDATION

Quarterly Report to Fund Advisors

Homer Foundation Fund Details - April through June 2020

Fund Holder	City of Homer: Library Advisory Board
Fund	**Library Endowment Fund**
Fund Type:	**AGENCY ENDOWMENT**
Fund Code:	1332

PORTFOLIO SHARE (Corpus)

Beginning Balance	-
Contributions	12,096.73
Fund Decreases	-
Quarterly Portfolio Change	-
Ending Balance	**12,096.73**

AMOUNT AVAILABLE TO SPEND (ATS)

Beginning Balance	-
Increases	-
FY21 ATS*	483.87
*available after September 30, 2020	
Grants and Withdrawals	-
Ending Balance	**483.87**

HOMER FOUNDATION

Quarterly Report to Fund Advisors

Homer Foundation Fund Details - July through September 2020

Fund Holder	City of Homer: Library Advisory Board
Fund	**Library Endowment Fund**
Fund Type:	**AGENCY ENDOWMENT**
Fund Code:	1332

PORTFOLIO SHARE (Corpus)

Beginning Balance	12,096.73
FY21 ATS Allocation	(483.87)
Contributions/Donations	-
Fund Decreases	-
Quarterly Portfolio Change	713.22
Ending Balance	**12,326.08**

AMOUNT AVAILABLE TO SPEND (ATS)

Beginning Balance	-
Increases	483.87
Grants Awarded	-
Ending Balance	**483.87**