A scenic view of a town street, likely in Juneau, Alaska. The foreground is dominated by a large, vibrant flower bed with various colorful blooms, including red, yellow, pink, and purple flowers. In the middle ground, there are several multi-story buildings with balconies, some featuring red and blue accents. The background shows a lush green forest and a rocky mountain peak. The overall atmosphere is bright and cheerful.

Championing Philanthropy

JUNEAU COMMUNITY FOUNDATION
2017 ANNUAL REPORT



BOARD MEMBERS

Mike McKrill
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Rick Shattuck
VICE PRESIDENT

Bob Rehfeld
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SECRETARY

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Eric Kueffner

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Karen Taug

Karen West

STAFF

Amy Skilbred
EXECUTIVE DIRECTOR

Jamie Waste

Jenna Rutecki

OUR MISSION To increase philanthropic giving in Juneau. We promote philanthropy and meet the needs of our community to create a healthy, safe, and culturally rich environment.

OUR VISION To make charitable giving easy, effective, and rewarding. We serve as the leader and primary resource for philanthropy in Juneau by collaborating with the individuals, organizations, and donors who work to make Juneau a better place.

We seek to create permanent endowments supporting a variety of community “fields of interest” and to facilitate dialogue with stakeholders, champions, and service providers in these fields so that donors may easily choose the direction of their charity and may also be assured that grants will be made to fulfill their wishes, positively impacting the lives of Juneau’s residents today and tomorrow.



Juneau Community Foundation
350 N. Franklin St., Ste. 4 • Juneau, AK 99801
juneaucf.org • info@juneaucf.org • 907-523-5450

PHOTOS: Michael Penn, Mark Kelley, Jack Kreinheder

Champion philanthropy

Message to the community

Our primary goal is to increase giving so that the money available to meet community needs continues to grow. We are indeed championing philanthropy. In the past year the number of donors doubled. The amount donated climbed from \$1.5 million in 2016 to \$2.9 million in 2017.

This year, with your help, the Foundation achieved two significant undertakings.

First, we launched a strategic approach to philanthropy through five Field of Interest Funds. For each Fund, board leaders recruit Community Champions—people who are passionate about an area, will work to select projects, and will encourage their funding. Some of the projects already undertaken with Field of Interest Funds

include extending the Juneau Alaska Music Matters youth program, expanding STEM opportunities, renovating the Treadwell Ditch Trail, and planning for a public-use cabin at Eaglecrest.

Second, the Foundation played a major part in the transformation of the long-held idea of providing housing for Juneau's most needy residents to the reality of Forget Me Not Manor. This home to 32 residents opened in September 2017. It came about after community leaders, nonprofits, individual and business donors, local and state agencies, and foundations all worked together. The Foundation partnered with the Juneau Coalition on Housing and Homelessness by providing \$300,000 over three years to support the project.

Your giving combined with that of others is transforming our community. We appreciate your passion and generosity. Together, let's keep on championing philanthropy!



Mike McKrill
2017 Board President

Amy Skilbred
Executive Director

Field of Interest Funds

COMMUNITY CHAMPIONS

Dick Behrends
Lisa Kramer
Jack Kreinheder
Skip Elliot
John Pugh
Linda Rosenthal
John Bursell
Merry Ellefson
Bruce Denton
Dave Haas
Stephanie Hoag
Paul Douglas
Tim Dudley
Chris Gianotti
John Gitkof
Jim Housley
Cathy Muñoz
Bob Janes
Nancy Jones
John McConnochie
Karen Housley
Doug Murray
Eric Olsen
Bill Shattenberg
Ian Fisk
Doug Trucano
Eric Paulsen
Jim Williams
Vicki Bassett
James Bibb
Sally Smith
Marc Scholten
Dave Hanna
Tom Daugherty
Sally Rue
Zane Jones

This past year, the Foundation started realizing a long-held goal of building Field of Interest Funds in order to play a more significant role supporting nonprofits and community groups in the following areas: Youth, Education, Arts & Culture, Parks, Trails & Recreation, and Health & Social Services.

“I built my life and business here. I care deeply about Juneau and want to help provide career opportunities for our young people.”

– Dick Behrends, Community Champion, Education Fund

Community Champions are key to this work. They are passionate about their area of interest, give financially, ask others to give, and if so desired, they participate in project selection and development. Individuals and businesses pool their resources to achieve greater community impact through a range of endeavors, including successful projects that could be brought to scale and new programs to fill in gaps. Our Champions are leading the way, working with board leaders to identify and complete priority projects, while, at the same time, building these funds for the long term.

“I enjoy being an active participant in improving our neighborhood parks and local trails, making our community a better place to live for all generations.”

– John Pugh, Community Champion, Parks, Trails & Recreation Fund

Champion philanthropy

Join forces

The two projects below exemplify successful community collaboration. Contact the Foundation to learn more about Field of Interest Funds and how you can support ongoing projects.

Youth Fund Youth programs and activities enrich individual lives and stimulate positive social interaction, while also showing kids the benefits of community organizations and civic participation. The Youth Fund raised over \$20,000 to support JAMM's tuition-free music program.



“From funding our pilot program at Glacier Valley many years ago to supporting our current expansion efforts, the Foundation is critical to JAMM’s success.” –Lorrie Heagy, Director, Juneau Alaska Music Matters

Parks, Trails & Recreation Fund

Parks, Trails & Recreation Fund participants actively assist nonprofit partners like Trail Mix and Eaglecrest Foundation to raise funds for several local projects, including the Treadwell Ditch Trail Renovation and an Eaglecrest cabin. In the months ahead, we will also raise community awareness and funds for local park and recreation area improvements.



“With the Foundation gathering matching funds, we anticipate moving forward with the Treadwell Ditch Trail renovations much more quickly, and we’ll all be able to enjoy it sooner.”

–Erik Boraas, Executive Director, Trail Mix

Youth



Call it enlightened self-interest, building positive public relations, boosting staff morale, or fostering the work force of the future—for the employees of SECON Southeast Alaska, which builds and maintains much of our region’s transportation infrastructure, being generous is just part of taking care of business.

“We live here. Our kids go to school here. We’re not just here to make money,” says Tim Dudley, who manages the Juneau office in Lemon Creek. Growing up in a small community, Tim learned that it takes everybody to make things work.

The company sponsors countless sports teams and other student groups. “It’s really hard for us to say ‘no’ to those kids when they come in,” admits contracts manager Jenny Huntley. SECON has also donated tons of material, equipment, and labor for things like community basketball courts, a new driveway for AWARE, and the planned rebuild of Project Playground at Twin Lakes.

“We all gotta give back, and there’s no better way to give back than through our youth.”

—Tim Dudley, SECON

A \$10,000 gift to the Foundation’s Youth Fund took SECON’s corporate philanthropy to the next level. “It’s a way for us to reach a large number of kids and families and to help a lot of different organizations with one donation,” Jenny explains. Still, she knows she hasn’t bought her last raffle ticket or roll of giftwrap: “We’ll definitely keep doing what we’re doing. In a way, it’s our responsibility. It begins with our leadership.”

Champion philanthropy

Nurture generations

“Involving our younger generation in worthwhile activities and trying to teach them good core values—that’s what it’s all about. It is the way I was raised. My parents taught me about giving.” –Tim



THE DONOR SECON Southeast Alaska
Tim Dudley, General Manager

THEIR GIFT Boosting everything from hockey teams
to Scout troops

THEIR LEGACY Paving the way for Juneau’s future



Alaska Youth Choir

2017 GRANTS **YOUTH**

Girls Rock Camp Alaska, Sitka Fine Arts Camp, Discovery Southeast, JAMM, TMHS/JDHS Track & Field, Lynn Canal Running Camp, Juneau Youth Sailing, Parents for a Safe Graduation, Perseverance Theatre, Alaska Youth Choir, Juneau School District Food Program, 4-H Club, AWARE—Girls on the Run, Dzantik’i Heeni Middle School, Glacier Swim Club

Parks, Trails & Recreation

Lisa Kramer and Glen Wright have been avid hikers, walking Juneau trails and supporting the cabin system in Southeast Alaska, since they moved here in the 1980s. They recognize the importance of maintaining our world-class trail system and the benefits it brings to daily life. That's why donating to the Parks, Trails & Recreation Fund was a perfect fit.

They find that getting out for a walk or hike improves their outlook on the day and on life. Our trails and parks provide people of all ages and abilities daily opportunities to enjoy where we live. Having raised two children in Juneau, Lisa and Glen have seen Juneau's tech-savvy teens and young adults develop as much passion for the outdoors as their elders. A healthy trail system, the couple insists, makes for healthy kids and a healthy community.

“Get outside... and your attitude improves immediately.” – Glen Wright

Lisa and Glen recognize that the ease of “getting away from it all” in Juneau and having so much natural richness in our backyard can also make it easy to take for granted community resources like our parks, trails, and wilderness cabins. But these assets require maintenance to remain accessible, clean, and safe, and there are always opportunities for expansion and improvement. That's why they are glad to support the Foundation and partner organization Trail Mix in the renovation of the popular and historic Treadwell Ditch Trail, which stretches 14 miles from Eaglecrest to Mt. Jumbo on Douglas Island.

Champion philanthropy **Enhance** community assets

“You don’t really think about giving; it’s just what you do. Because things go away pretty fast if you don’t.” —Lisa



THE DONORS **Lisa Kramer and
Glen Wright**

THEIR GIFT **Building new paths to the great outdoors**

THEIR LEGACY **Helping us all unplug**



Trail Mix at work on Paris Creek bridge

2017 GRANTS **PARKS, TRAILS & RECREATION**

Eaglecrest Foundation, Jensen-Olson Arboretum, Trail Mix, The Alaska Center, Juneau Raptor Center, Friends of the State Museum, Juneau-Douglas City Museum, Eagle River Methodist Camp



Arts & Culture

Born and raised in Juneau, Peter Jurasz grew up on the waters of Southeast studying whales with his family. They documented the extraordinary cooperative feeding behavior of humpbacks and his father coined the term “bubble net feeding.”

Andrea Watts moved to Juneau in the early ‘90s. She fondly recalls walking the narrow downtown streets upon her arrival, in awe of the town’s cultural uniqueness and natural beauty. “Juneau is vibrant, creative, and welcoming,” says Andrea.

Peter and Andrea have quietly become significant philanthropists, donating money and untold hours to nonprofit events, facilities, and operations. Andrea most recently served on the board of the Juneau Lyric Opera. Peter has used his financial talents to assist a variety of nonprofits and is currently co-chairing the fundraising effort for the New Juneau Arts and Culture Center.

“It’s not just about the arts. It’s about a communal effort. It’s about diversifying and strengthening Juneau’s economy.” – Peter Jurasz

They are excited about the new generation of artists, creative entrepreneurs, and patrons who are enriching our city. The Foundation supports these efforts through grants, the New JACC Fund, and the Arts & Culture Fund, which seeks long-term funding to sustain and promote all arts organizations in Juneau.

“A significant long-term consequence of getting the New JACC built will be an increased awareness of the impact of collective, philanthropic efforts,” Peter says. That impact, just like those amazing bubble net-feeding whales in our local waters, can be truly extraordinary.

Champion philanthropy

Inspire creativity

“Anybody, regardless of their financial resources, can be philanthropic—there are so many ways to give. Giving is empowering, and it feels really good.” —Andrea



THE DONORS **Andrea Watts and Peter Jurasz**

THEIR GIFT **Supporting a dynamic cultural community**

THEIR LEGACY **A vibrant creative commons**



New JACC Building rendering

2017 GRANTS **ARTS & CULTURE**

KTOO, Black Wolf, Juneau-Douglas City Museum, Juneau Arts and Humanities Council, New JACC, Seward Statue, New JACC Piano, Juneau Lyric Opera, Whale Project, Rocky Ridge Music Center, Empty Chair Project, Juneau Jazz and Classics, Sitka Fine Arts Camp, Woosh Kinaadeiyí, Skagway Arts Council, JAHC Arts Scholarships, Perseverance Theatre, Alaska Youth Choir, Juneau Dance Theatre, Friends of Alaska State Library, Friends of the Juneau Public Libraries, JAMM



Education

Like a lot of Juneau folks, the Jensens came to Alaska for a “temporary” job. That was in 1973. Not only are Wayne and Rita still here, but they’ve made Alaska their home for good by investing in it.

*“Most of our giving is local—
to things here in town—and that’s
significant. That’s good for the
economy. That money circulates.”*

— Wayne Jensen

One project that Wayne worked on with a local Rotary Club was building a greenhouse at the Lemon Creek Correctional Facility. Many inmates benefit from tending the garden, having fresh produce, and learning new skills that will help them find a job when they leave. “It’s even opened a career path for some of them,” says Wayne, who’s put his architect’s expertise, along with a lot of elbow grease, behind similar improvements across Southeast.

The Jensens have given their time and money to literacy programs, youth activities, public art...anything that strikes them as a worthwhile investment in a brighter, more sustainable future for our community. They’ve taught their daughter those values as well.

Rita is now passing on their philanthropy tradition to the grandchildren. She and Wayne share the belief that volunteering together as a family teaches the value of “sweat equity.” When it’s leveraged toward a collective purpose, the satisfaction of rolling up your sleeves alongside others and accomplishing something big is hard to beat. “Sometimes you get your hands dirty,” says Wayne, “and what kid doesn’t love that? That’s the thing about philanthropy. It’s fun!”

Champion philanthropy

Pass it along

"If you do things with your children, even if it's just buying extra canned goods when you're at the store and taking them to the food pantry, that really plants a seed." —Rita



THE DONORS Wayne and Rita Jensen
THEIR GIFT A lifetime of learning, building, and sharing
THEIR LEGACY Planting seeds for the future



Illustrator speaks at Sayéik Gastineau Elementary School

2017 GRANTS EDUCATION

Foundation for Glacier and Environmental Research, Floyd Dryden Middle School, Discovery Southeast, Skagway School District, Gold Creek Child Development, Scholarships to the University of Alaska and other educational institutions, Inian Islands Institute, JAMM, High School Close-Up Program, Washington State University Trauma-Informed Training Program, Friends of the Library

Health & Social Services

The Foundation's Hope Endowment Fund and City and Borough of Juneau Social Service funds provided over \$1.8 million in grants to 27 of Juneau's front-line social service organizations in 2017. These grants support a range of programs to empower people. Significant community milestones include the opening this year of two new facilities that address Juneau's most pressing problems: homelessness and substance abuse.

The Housing First enterprise resulted in completion of Forget Me Not Manor, which provides shelter for men and women who, on average, have been homeless for more than nine years. Filling all 32 apartments with qualified applicants, Forget Me Not opened its doors in October. The Juneau facility also includes a physical, mental, and behavioral health clinic open to all. Only a handful of housing first facilities in the country have a clinic. Emergence of "housing first" facilities around the country is based on findings showing that often people cannot meaningfully participate in the other services they need until they are housed.

"The Foundation was an integral part of co-locating Juneau Housing First and JAMHI Midtown Clinic. They are proactive and assist in identifying other resources and opportunities. Our community is fortunate to have them!"

– Dave Branding, Executive Director,
JAMHI Health and Wellness



PROFESSIONAL ADVISORY COMMITTEE MEMBERS

Kate Burkhart
Terri Campbell
Bud Carpeneti
Tom Chard
Scott Ciambor
Rosemary Gruening
Lindy Jones
Keith Levy
Leslie Longenbaugh
Sam Muse
Elaine Schroeder
Wayne Stevens
Stacy Toner
Cris Waste

Champion philanthropy Empower people

Gastineau Human Services' new residential facility opened in February. It provides an alcohol- and drug-free environment for up to 10 men, enabling them to continue their work toward chemical independence. Residents attend outpatient clinics and access other support services. This type of housing extends the recovery process initiated at agencies like Rainforest Recovery Center and improves the chances of success.

Both of these new facilities are helping people every day, yet the need remains great. Another 32 beds at Forget Me Not could be filled today, if they existed; and, doubling the number of beds for men at GHS and providing similar housing for women in substance abuse recovery would give community members a better shot at recovery.

The Foundation, with your donations and support, is committed to helping our community tackle challenging issues of homelessness, substance abuse, mental health, and domestic violence in meaningful and effective ways.



Forget Me Not Manor

2017 GRANTS **HEALTH & SOCIAL SERVICES**

St. Vincent de Paul Society, National Council on Alcohol and Drug Dependence, Catholic Community Services, Juneau Housing First Collaborative, Association for the Education of Young Children, Alaska Legal Services, AWARE, Food Pantry, Eagle River Methodist Camp—FASD Camp, Gastineau Human Services, Juneau Police Department, Juneau Youth Services, National Alliance on Mental Illness, JUMPP, Zach Gordon Youth Center, The Glory Hole, Polaris House, Riverbend Elementary School, Big Brothers Big Sisters, SAIL, ORCA, Southeast Regional Resource Center, REACH—The Canvas, Planned Parenthood: Teen Council

Philanthropists of the Year

When Philanthropists of the Year Hugh and Shari Grant speak about the roots of their philanthropy, they go back to watching and hearing the stories of their parents helping others. Shari was born in Alaska and grew up in Ketchikan, and Hugh was raised in Ireland.



These citizens of Juneau believe in generously giving back. For many years, the Food Bank would receive 100 certificates for gas from an anonymous donor...eventually it came to light they were from Gas and Go, a business owned by Hugh and Shari. The Grants graciously helped hundreds of people in Juneau, with donations of their time and money. In addition, this year they helped raise over \$100,000 for the Juneau Hospice Endowment Fund.

Alaska Marine Lines and AEL&P/Avista Foundation received the Business Philanthropy Awards for their long service and generous giving. Both businesses have deep Juneau roots. Their traditions of philanthropy started long ago and continue today through their support of Juneau's nonprofit sector.

As champions of philanthropy, their generosity attracts new people to charitable giving, providing a greater impact.

Champion philanthropy

Change lives

In 2017, your support enabled us to award over \$3,161,900 to partner organizations and raise over \$200,000 to support the rebuilding of Project Playground at Twin Lakes.

Your Philanthropy at Work

- 32 homeless people moved into Forget Me Not Manor
- 197 people received housing assistance
- 50 families were supported with parenting home visits
- The universal elementary breakfast program was funded for second year
- 425 middle and elementary school students received weekend food bags
- 22 households received tenants' rights legal counseling
- 73 people attended the monthly family law clinic
- 74 people attended a caregiver conference
- 89 Big Brothers Big Sisters matches supported
- Sitka Fine Arts Camp and Perseverance Theatre supported
- Girls on the Run and 4-H Club supported
- In-home care for severely disabled people obtained
- 73 clients received outpatient services for Substance Use Disorder
- 14 clients sought treatment in residential substance abuse programs
- 8 college scholarships awarded
- Inian Islands Institute supported
- 740 hours of legal work for 184 cases
- Funds raised for the new JACC campaign
- 181 high school and 169 middle school students participated in Sources of Strength
- 74 interventions, 21 homeless preventions, 53 homeless received shelter assistance
- 14 assisted with move to permanent housing by navigators
- Discovery Southeast, Lynn Canal Running Camp scholarships awarded
- JAMM instruments purchased and program expansion supported
- Juneau Youth Sailing and Glacier Swim Club supported
- High School Spring Sports indoor training provided
- Legal advocate attorney at AWARE supported
- Parents for a Safe Graduation funded
- 72 middle school students participated in Outdoor Leaders program
- 62 GED tests taken, with the highest pass rate in the state
- 13 arts scholarships awarded
- 23 students and 25 family members attended FASD Whitecrow Camp
- K-5 students participated in Discover Tech Exhibit

Total Grants Made Since Inception: \$11,100,000. To see a complete list of 2017 donors and projects, please visit our website: juneaucf.org.

Thank you to our generous donors.

Finance & Investment

FINANCE & INVESTMENT COMMITTEE

Bob Storer
CO-CHAIRMAN

Bob Rehfeld
CO-CHAIRMAN

Mike McKrill
Rick Shattuck
Karen Taug

INVESTMENT ADVISORY COMMITTEE

Bob Bartholomew
Bob Mitchell
Linda Thomas
Sam Skaggs

At the Juneau Community Foundation, we keep our operating costs low and investments conservative to get the most out of your gift to the community. Our Finance & Investment Committee brings together expertise in finance, investments, and business to manage the Foundation's assets. The committee works with investment committee advisors and Vanguard Institutional Advisory Services to guide our investing.

FINANCIAL POSITION December 31, 2017

ASSETS	
Current Assets	
Cash & cash equivalents	\$ 1,392,153
Prepaid expenses	5,238
Total Current Assets	1,397,391
Investments	
Assets held in trust for others	56,587,356
Assets held by	1,931,734
Alaska Community Foundation	56,500
Total Assets	\$ 59,972,981
LIABILITIES & NET ASSETS	
Current Liabilities	
Administrative payables	\$ 779
Deferred revenue	26,500
Assets held in trust for others	1,931,734
Total Current Liabilities	1,959,013
Net Assets	
Unrestricted	32,240,521
Temporarily restricted	25,716,947
Permanently restricted	56,500
Total net assets	58,013,968
Total Liabilities and Net Assets	\$ 59,972,981

The unaudited Financial Position set forth above is preliminary and subject to adjustments and modifications.

Our Investment Philosophy

The following criteria dictate our investments:

SIMPLE uncomplicated investment vehicles.

TRANSPARENT investment in funds designed to replicate the broad markets.

EXPLAINABLE investments in three asset classes that replicate the performance of broad market indices, maintaining diversity without being complicated.

PATIENT investing for the long term and accepting market volatility.

Longterm Investment Account Performance

The Foundation invests the longterm portfolio in markets in primarily mature economies and accepts financial market volatility in the short term to achieve higher returns over a longer investment period. In 2017, the account earned 19.34%; for the trailing three years, the annualized return was 8.20%; and, 9.86% over five years. All three of these returns exceeded our benchmark, demonstrating that we are on track. To read our Investment Policy Statements for both of our investment plans, visit juneaucf.org.

Fiscal 2017 in Review

Grants Awarded	\$ 3,161,900
Contributions to the Foundation	\$ 2,942,000
Assets Under Management	\$ 59,973,000
Operating Budget	\$ 303,200





Foundation Funds

The Juneau Community Foundation helps people like you make a lasting difference with options for meaningful and effective charitable giving.

You can leverage your giving by contributing to an **existing fund**. When you give to a cause shared by others, the combined gift goes further to address the area you care about. You can choose among Field of Interest, special project, organization, or other funds.

You can continue contributions long after you're gone through **planned giving**. When you leave a gift in your will or trust, you will benefit your community and your charitable interests into the future.

You can **establish a charitable fund**. When you establish a fund with us, we connect you to local nonprofits with a history of success in areas that match your passion. We steward your fund and handle all grant making and reporting.

Every grant the Foundation makes begins with a gift from someone like you. Contact us about starting a new fund.

Field of Interest Funds allow donors to invest in specific areas of interest, such as Arts & Culture, Youth, Education, Health, Social Services, and Parks & Trails, instead of a specific organization. This type of fund is popular with donors who feel passionate about continuing to support the essential elements of a healthy society.

Donor, Family & Corporate Advised Funds make it easy for you to actively participate in grant making. You name the fund, identify advisors, provide a gift of cash, appreciated stocks or other assets, and then recommend grants. The grants are issued in the name of the fund, or anonymously if you prefer. Your gift can be

Champion philanthropy

Work for the common good

placed into an endowment that is invested over time with earnings used to make community impact grants. In this way, your gift and all future earnings provide a continuing source of community capital, doing good work for many years to come. Advised funds can be set up by an individual, a family, or a group of people.

Donor Directed Endowment Funds enable you to establish an endowment whereby a portion of the earnings flows to a specific organization or program that you wish to support for years to come.

Special Project Funds are started by individuals or groups of individuals to support a specific community project of limited duration.

Scholarship Funds offer you the opportunity to support students based on criteria that you choose.

Organization Endowment Funds are established by nonprofit organizations with 501(c)(3) status to provide them with income and budget stability. These organizations build their endowments in an investment pool at the Foundation. The fund is established by the agency, which recommends grants. Typically, organizations use the earnings on their support to pay for general operations while keeping the principal intact.

Memorial Funds provide a meaningful way to honor family members, friends and other who have passed away. Call us and we can establish a memorial fund over the phone. Memorial funds are often shorter-term funds used to finance a community project or program. Use of these funds is usually directed by a family member.

Unrestricted contributions to the Juneau Community Foundation are gifts that help us make grants, fund community projects, grow a community endowment, and offset general operating costs. The Foundation's board of directors determines how best to use unrestricted funds. This is a good option if you have many charitable interests and want to provide the Foundation with the greatest flexibility.

Ready to act, but unsure where or how to focus your charitable giving? Thinking about setting up a private foundation but wanting to know the benefits of starting a fund at the Juneau Community Foundation? We can help. Call, email, or stop by and talk with us.

For a complete list of Foundation funds, visit juneaucf.org.

Legacy Gift



Some years ago, feeling that the family Christmas gift exchange was doing little more than wearing everyone out, Dale Anderson and his siblings began donating their collective funds to a mutually agreed-upon charity each December rather than buying more presents. That good idea eventually led to another, with Dale and his wife Honey Bee devoting a portion of their estates to a family-run philanthropic trust, as Legacy Donors to the Juneau Community Foundation.

“The distributions will be controlled by our children. Each year, one of them will choose a charity,” Dale explains. “They’re excited about it. I won’t say they’re looking forward to the opportunity,” he adds with a dry chuckle—as a financial advisor, he’s comfortable with the “after we’re gone” aspect of planned giving and can joke about it. But, for most of us, it’s hard to talk with our kids about things like finances and end-of-life. We tend to put off those conversations, put off formalizing those plans, and often miss the chance to pass along to our children and grandchildren something worth more than money.

“The amount you set aside for a charitable legacy is not the important thing. It’s more of an attitude toward sharing.”

— Dale Anderson

That attitude comes naturally in a place like Juneau, Honey Bee suggests. Originally from Texas, she met Dale, a second-generation Alaskan, while the two were college students

Become a philanthropy champion Build an enduring asset

“Giving is something we love to do. It’s not a task or a burden, it brings a lot of joy into our lives to see what we’ve been able to do. We’ve been able to pass that value on to our children. Our children are all givers.” – Dale



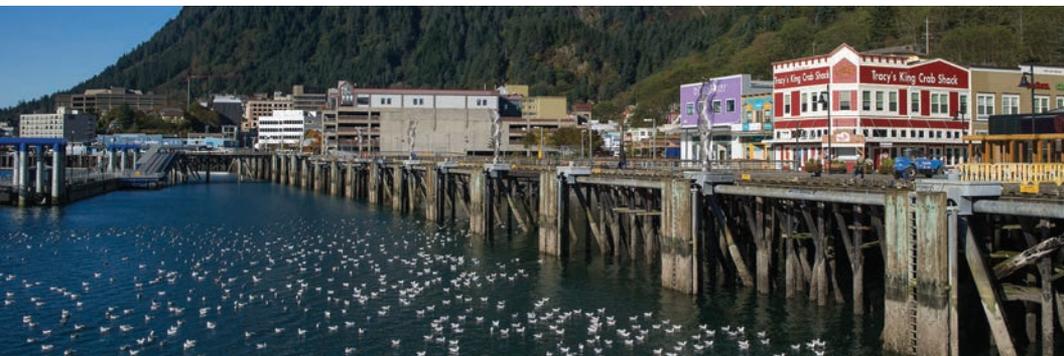
THE DONORS Dale and Honey Bee Anderson
THEIR GIFT A family trust at the Foundation
THEIR LEGACY Built-in giving to support future generations

in Oklahoma. But there really wasn’t a question where the Andersons, now married 48 years, would settle and raise their family. “Juneau has an essence of community, similar to many small towns. We’re geographically landlocked, so you have to build a community of support. There is commonality that brings us together,” says Honey Bee.

“Even people who’ve moved away, they always have this tie to Juneau.”

– Honey Bee Anderson

For their four grown children and their families, especially those who’ve made homes elsewhere, the Andersons see their Community Foundation Legacy Fund as another enduring connection to Juneau and to the life they have built here together.





Your Philanthropic Home

Community foundations provide an effective local vehicle for creating funds that benefit the community today and in the future. Giving to the Juneau Community Foundation is easy. You can contribute an unrestricted donation, give to any of the funds listed in this annual report, or establish a new fund.

At the Juneau Community Foundation, we keep our operating costs low and adhere to our investment philosophy to get the most out of your charitable gift to the community. Each gift to the Foundation reflects your trust in our ability to invest and use resources wisely. Our Finance and Investment Committee brings together expertise in finance, investments, and business to manage the Foundation's assets and guide our annual budget.

The Foundation accepts contributions by:

- Credit card, via www.juneaucf.org
- Check to the Juneau Community Foundation
- Donating publicly traded stock or other investments

Bequests & Planned Giving

Bequests through wills or other planning instruments, such as life insurance or IRAs, create or add to permanent endowments to support your community. Leaving a bequest in your will is a simple process. First, name the "Juneau Community Foundation" and then provide either a dollar amount or a percentage of your estate that you wish to donate. The Foundation can also be named as a beneficiary on a life insurance policy, retirement plan, or IRA.

"By designating funds from an IRA or a 401k, you're able to make 100 percent of that money work for those causes you believe in...and we all like to see our money work well."

—George Reifenstein, Legacy Donor

Talk with your financial advisor to find out more about the benefits of naming the Foundation as a

We can help you Champion philanthropy

beneficiary in your will, life insurance policy or retirement plan, or giving through a charitable trust or charitable gift annuity.

Private Foundations

The Foundation can assist you in achieving the same philanthropic goals as a private foundation and relieve you of the administration, bookkeeping, and investment management.

If you have or are considering starting a private foundation, you may want to think about the benefits of working through your community foundation. Several private foundations in Juneau found that by moving into the Juneau Community Foundation they could better focus their time and energy on achieving their philanthropic goals.

Establishing a Fund

If you are interested in establishing a fund, call us to discuss the various options available and to find out what will best meet your needs now and in the future. We administer a variety of funds that afford you the opportunity to choose a level of involvement that suits you:

- High involvement: donor-advised fund
- Medium involvement: a Field of Interest Fund
- Minimal involvement: unrestricted funds where we match available funding to changing community needs

“Charitable giving through the Juneau Community Foundation is an efficient and effective way for clients to help the charities and causes that matter to them. By using the Foundation to assist with your planned giving program, you ensure local management of funds for the benefit of organizations and people in ways that you can see and appreciate right away and that can continue long into the future. I encourage you to use and support the Juneau Community Foundation.”

—Beth Ann Chapman, Attorney at Law, Faulkner Banfield, PC

We’re your charitable partner here in Juneau.

For more information, visit www.juneaucf.org.

Note: Contributions to the Juneau Community Foundation are tax-deductible and irrevocable. Please consult with your tax advisor, financial planner, or estate planning attorney to learn about specific advantages to you and your heirs.

Be Like Ken

A philanthropy champion

When Ken Leghorn passed away from pancreatic cancer on April 11, 2017, our community lost a wonderful person and a great philanthropist. It's hard to pinpoint when Ken became a champion of philanthropy. He'd embraced and proselytized about the necessity to give back, both through his actions and his donations, long before he helped establish the Juneau Community Foundation in 2000.



In early March 2017, the Foundation awarded Ken our Founders' Award, which recognizes a lifetime of achievement and service to Juneau and Alaska. Surrounded by family and many friends, Ken spoke powerfully about the transformational effects of philanthropy on a community.

By sharing some of Ken's own words here, it becomes clear why family and friends celebrated his life with a simple message: **Be Like Ken.**

"What is Philanthropy? To me it's about, yes, time, and yes, expertise. But, really, it is about giving money away, right? It's about gifting. It's taking your hard-earned dollars and giving them to causes that you believe in. It's investments in ideas, but it's really investments in people—the people who are going to bring those ideas to fruition. The results are a better life and a better community.

If philanthropy is about giving away money, how much are we talking about? Let's leave annual memberships aside and talk about what it takes to be a significant donor. Well, when I got off the ferry almost 40 years ago, for \$500 or \$1,000, you could be a major donor to any organization in town. Well, guess what? That number has not moved by a dollar in 40 years. It's still the same \$1,000. And it's not because people are not generous or incredibly giving. It's mostly because they are not being asked. That bar just hasn't been raised not only to match inflation but to match the incredible work that is being done.

What happens when you give an organization \$5,000 or \$10,000 or more? You start to be part of transformative ideas, investing more in the people who are doing the good work. Imagine if you took your \$5,000 and said to your favorite charity, "I'm going to give you \$5,000 a year for five years and I'll help you find nine other people who will do the same. What would you do with a \$250,000 commitment?" Wow, new program, new staff position, new ideas, new technology, membership campaigns... something transformative. Amazing things can start to happen that you are part of and have helped make happen!

The Juneau Community Foundation is doing exactly that kind of donor-driven fundraising and philanthropy. They are launching several new Field of Interest funds, community sources of support for a few broad but well-defined areas of grant making in this community. Those new funds will grow into incredible sources of community impact mostly through bequests and very large gifts. But, to get started, they need to prove themselves and show the kind of work they can do and that takes seed money."

Ken was always quick to say that generosity is not tied to a dollar amount but it's about reaching higher than you have in the past. We encourage you to **Be Like Ken.**

What's Your Giving Legacy?

Be Like Ken. Make sure that Juneau has a thriving nonprofit community into the future. You can leave your own legacy for Juneau through a planned gift to the Juneau Community Foundation. In addition to legacy giving, you have the option of donating stock, gifting a portion of your Required Minimum Distribution, or naming the Juneau Community Foundation as a beneficiary of your trust, retirement plan, or life insurance policy. If you would like more information on leaving a gift, contact Amy Skilbred at amy@juneaucf.org or 907-523-5450.





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Your Foundation.
Your Future.