



A STORY OF

CONNECTION

2012

The HOMER
FOUNDATION

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ON THE COVER:

*Whale project
volunteer Gaye
Wolfe, January 16,
1945-October 14,
2012, was a large
part of the connective
tissue of our
community.*



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



10 REASONS PEOPLE CHOOSE TO GIVE THROUGH COMMUNITY FOUNDATIONS

We are a local organization with deep roots in the community.

Our board & staff have broad expertise regarding community issues and needs.

We provide highly personalized service tailored to each individual's charitable and financial needs.

Our funds help people invest in the causes they care about most.

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

We partner with professional advisors to create highly effective approaches to charitable giving.

We offer maximum tax advantage for most gifts under federal law.

We multiply the impact of gift dollars by pooling them with other gifts and grants.

We build endowment funds that benefit the community forever and help create personal legacies.

We are a community leader, convening agencies and coordinating resources to create positive change.

A STORY OF CONNECTION

1

This summer I was searching for a theme for our 2012 Annual Report when my amazingly creative volunteer, Cindy Birkhimer, suggested using the Pratt Museum's Community Gray Whale Project. The Foundation had awarded a grant to the Pratt from the Daisy Lee Bitter and Jen-son Donor Advised Funds to support the project. "You know the song," she said, and started singing, "The head bone's connected to the neck bone. The neck bone's connected to the back bone. The back bone's connected to...." We had a good laugh, and then she continued, "All of those bones being connected reminds me of all the connections the Homer Foundation makes in our community, like connecting donors' generosity to great projects." The Homer Foundation as connective tissue — I liked it.



I headed over to the workshop behind the Pratt Museum where the project was underway. Piece by piece, or rather, bone by bone, interns and volunteer community members were assembling the skeleton of a 37 foot gray whale. Orchestrating the whole project was local expert Lee Post, known as the Bone Man in Homer and beyond. Lee has quite literally written the book on gray whale skeleton articulation. Talk about connections: bone expert Lee Post, a pile of bones to connect, a group of volunteers of all ages, resulting in a lasting educational model that will connect us, and future generations, to the natural environment around Kachemak Bay.

As you read through our Annual Report for FY2012 I invite you to look for the many connections the Homer Foundation has made in our community, like the Pratt Museum Community Gray Whale Project, and the 95 other grants that were funded to make the lower Kenai Peninsula a better place to live.

Connecting generosity to community need on the lower Kenai Peninsula since 1991...

Joy Steward
EXECUTIVE DIRECTOR

A STORY OF MANY HAPPY RETURNS

2

Phil Morris, the chairman of the Homer Foundation's Investment Committee, has long asked me if I could put down on one page our general investment strategy. I can do it in one word: work.

We invest in areas that are too small to attract the computer-generated algorithms but reflect real-time market sentiment. This takes an inordinate amount of time and patience. Purchase decisions are made entirely based on the positive mathematics of a position. Selling decisions are determined by the market. This is 21st century investing: difficult work done on a daily basis by a group of local volunteers.

Unlike most foundations in the United States (that distribute an amount that is a small percentage of market value and thus do not rely on the productivity of their investments), the Homer Foundation depends on actual earnings to provide its grants and charitable support. And 2012 was a year with remarkable earnings. Our investment portfolio of just over two million dollars returned over \$296,000.

The earnings support those programs and causes that make living in this part of Alaska so caring and community-oriented. The Community Chest reaches out to help those in need. Advised funds support many of the area's non-profits and educational programs. The scholarship funds provide financial assistance to many for their post-secondary tuitions. The endowments add to the operating budgets of the endowed institutions.

The money, however, is really the least of it. The real return to a community foundation is the value provided by the human capital of those who live here. Those citizens and families who build playgrounds and libraries, coach teams, make the art that delights and challenges us, protect our environment, and serve on boards and commissions and in government define and live our values.

These are the "returns" by which I hope the Homer Foundation will be measured.



Ken Castner
CHAIRMAN

A STORY OF COMMUNITY

3

This story begins in 1999 in Halibut Cove, when a whale carcass was hauled to a nearby beach. Some 50 members of the community took on the daunting task of butchering the whale so its skeleton could be salvaged. Some of the skeleton was lowered to the floor of Kachemak Bay where it was cleaned by sand fleas and microbes. Other parts were buried.

Fast forward to 2012 and the Pratt Museum is planning an exhibit in January of 2013 on whale-human interactions. The Homer Foundation supported the effort through grants from the Daisy Lee Bitter and Jenson Donor Advised Funds.

Local skeleton reconstruction expert Lee Post was brought on board to lead the effort. But with hundreds of bones and countless projects that needed doing, the question then was, who else could help.

"I knew this was bigger than a one-person project," Post said. "My fantasy was, what if we opened it up to the public."

Post had recently worked on a skeleton articulation in Port Townsend, Wash., that involved a lot of volunteers, but that was in the winter, and in a community with lots of retired people.

"There was the factor of can we really get anybody in the summer?" Post asked.



But along with master organizer Mary Maly, word was circulated through the community that volunteers were needed. They held an informational meeting, and the Pratt's basement was full of interested people. Only a handful of people signed up for specific projects, however.

"I thought that wasn't many but it's a start," Post said. "I only needed a handful if they are the right people."

The first day, they didn't know what to expect. They set up a few chairs and tables and 21 people showed up. That's way too many, Post thought, but it worked out because the first few days were filled with the project of reconstructing hundreds

of tiny bones with a filler. The second day, 16 people showed up. In three days, the volunteers accomplished what Post thought would take two weeks.

But Post said he still couldn't get anyone to commit to a specific project or even to showing up again. Each day, there were different people, and new



people came all the way through the project. A few people signed up for specific projects, but in general, it was random. After about a month, though, Post said he began to relax about the volunteers because they just kept coming. And they were an enthusiastic crowd.

"They did really great work," he said. "There were a handful of people that I could hardly drag away. I know their work life was suffering, and I'm pretty sure in at least one case, their home life was suffering. There were even people who had summer plans and were lamenting that they had to miss out on part of the process."

In six weeks, the project was mostly completed. A total of 53 people participated in the whale skeleton articulation. Some came only a few times — others were regular fixtures, like Sam Smith, who constructed the outline of a tail for the skeleton so people viewing the hanging mammal would recognize it.

Post said the finished product, which will be carefully moved into the place this winter, is one of the nicest gray whale skeletons he's ever worked on. Having recently worked on a professionally articulated skeleton in Kodiak, Post was able to bring those techniques to this project, and guide volunteers.

But the key to the whole project was the continuous flow of volunteer support, he said.

"It's a huge project," Post said. "It's like building a house in some ways. One person doing it themselves would get overwhelmed and burned out but when you have this much volunteer enthusiasm, it's contagious and no one person is getting fried doing one thing because you have thousands of projects."

At the conclusion of the project, Post sent a tribute out to the dozens of people who helped with the project via the blog set up to document the project.

"In 49 days of work (A very Alaskan Number) 51 of you put in over 800 hours of time and converted a rather rough pile of chipped, abraded, consolidated whale bones from a 38-foot gray whale, into what is going to be a world-class exhibit featuring one of the nicest gray whale skeletons ever assembled. Wait till you see it," Post wrote. "Well done bone-builders."

You can see numerous pictures and posts of the project at prattmuseumgray-whaleskeleton.blogspot.com/



A STORY OF

SCHOLARSHIP

Scholarship Awards Support Area Students:

The Homer Foundation manages a variety of scholarship funds. These funds have been started by individuals, families, groups and businesses whose motivations vary widely, from memorializing loved ones, to supporting a particular field of study. Collectively they illustrate the extreme generosity of our community, and the value it places on our youth and their education. Your tax exempt donations can help support area scholarships, knowing that your gift will be here to help educate our youth today, and far into the future.

Because of the combined vision, generosity, prudent management, and volunteer effort, the Foundation was able to award a total of \$21,250 to area students in 2012 from the following Funds:

HOMER COMMUNITY SCIENCE SCHOLARSHIP:

While still teaching at Homer High School, Science teacher Stan Eller received an award for excellence in teaching science. Stan used that award as the seed money to establish the Homer Community Science Scholarship Fund. Community members continue to support the fund, which distributes annual scholarship awards to Homer High School graduates seeking postsecondary education in the life sciences.

Lauren Cashman, Biology/Chemistry at Pacific Lutheran University, \$1000

Marie Schmidt, Environmental Science at Vassar, \$750

Dana Olesch, Anthropology/Biology at Beloit College, \$500

Sarah D'Water, Dental Hygiene at University of Alaska, Anchorage, \$500

ALAIN AND DANIEL RIESER SCHOLARSHIP:

The Tin Roof Fund was established by an anonymous donor. The donor directs a portion of the annual earnings to support several scholarship

awards. The Alain and Daniel Rieser Scholarship is awarded to a Homer High School graduate with interest in foreign language, culture, and travel.

Dan Adickes, Third World/Environmental Studies at Soka University of America, \$3000

Kaya Morelli, for travel to Argentina, Patagonia and Chile, \$1500

BELUGA WRITING SCHOLARSHIP:

The Tin Roof Fund was established by an anonymous donor. The donor directs a portion of the annual earnings to support several scholarship awards. The Beluga Writing Scholarship is awarded to Homer High School graduates who excel in creative and non-fiction writing.

Mallory Drover \$3000 and
Kyle Wentz \$3000

DREW SCALZI MEMORIAL MARITIME SCHOLARSHIP:

This scholarship fund was established in memory of fisherman and statesman Drew Scalzi by

the North Pacific Fisheries Association with support from the Scalzi Family and members of the fishing community. The scholarship is awarded to a resident of the Homer/Anchor Point area between the ages of 16 and 25, who have either had personal experience in, or whose family is involved in, the maritime industry within Alaska; or who is pursuing training to work in the maritime industry in Alaska.

Verinia Reutov, Photography, deferred to spring 2013, \$1000
Shlomo Gherman, Industrial Electricity, AVTEC, \$500

DIANE WAMBACH "SHOOT FOR THE STARS" SCHOLARSHIP:

Diane Wambach believed in people's dreams and always encouraged her own children to shoot for the stars. Her family established this scholarship fund in her memory to encourage and support young adults willing to pursue their educational and career goals. The individual must have graduated from a school within the Homer Foundation's service area or have a GED equivalent.

Aurora Roderick, Certified Nursing Assistant at Kachemak Bay Campus, \$500
Fallin Crauthers, Social Welfare and Child Development at University of Alaska, Anchorage, \$500

KACHEMAK BAY MEDICAL CLINIC SCHOLARSHIP:

The Fund was established by Dr. Paul Raymond of the Kachemak Bay Medical Clinic to provide financial assistance to a public high school graduating senior in the greater Homer area who has best exemplified academic excellence, community and/or school service, as well as a strong work ethic.

Rayann Clutts, Brigham Young University, \$500/yr for 4 years

HEALTH CARE PROVIDERS SCHOLARSHIP:

This scholarship has supported lower Kenai Peninsula high school graduates since 1985. In 2006 the Health Care Providers Scholarship organizers established a permanent endowment at the Homer Foundation to ensure that the scholarship would continue in perpetuity. The purpose of the scholarship is to provide financial assistance to

students from the lower Kenai Peninsula who are pursuing a career in a health care related field at an accredited professional or technical school. Applicants may apply as continuing students, but may receive the award only once.

Mallory Drover, Nursing at Kachemak Bay Campus, \$500
Rayann Clutts, Brigham Young University, \$500
Jenna Kropf, Nursing, deferred, \$500
Marta Todd-Hashagen

A.W. "BILL" JOHNSON TEACHER EDUCATION SCHOLARSHIP:

A.W. "Bill" Johnson served as a teacher, counselor, coach and mentor to many students in his 20 years at Homer High School. Bill was always one to help give a leg up to any student willing to work hard. To celebrate his memory, and his love of teaching, his wife, Liz Johnson, has established the A.W. "Bill" Johnson Teacher Education Scholarship Fund. The award goes to a Homer area graduate (GED equivalent). Continuing students may apply.

Erik Rosencrans \$1000

ALICE WITTE MEMORIAL SCHOLARSHIP FUND:

Created in memory of much-loved Lady Mariner's Volleyball coach, Alice Witte, the scholarship is designed to support a junior or sophomore woman's volleyball player in attending a summer volleyball camp outside of Alaska prior to her senior year. Each year the High School coaching staff selects a player that best exemplifies the spirit of Coach Witte, who loved the game and taught her girls to have fun and play like crazy. This year the fund also supported scholarships to a professional clinic offered locally.

Zoia Basargin \$500.

A STORY OF PROMISE

5

Thea Wayne was the 2010 recipient of the Kachemak Bay Medical Clinic Scholarship, a multi-year award, which goes to a student who excels in academics and displays ethic by holding a job. Thea sent us this update recently:

After studying Communication for two years at Humboldt State University, I have decided to defer for a semester. I will be utilizing this temporary break from school to save money and travel. Towards the end of November I will be going to Thailand and the surrounding countries for a month. I see this as a different and exciting way for me to learn, and explore my interests. When I return I will begin taking classes again at HSU, and my goal is to talk to my advisors and organize my credits so that I will be able to go on exchange the following fall. I feel that my international experience will go hand in hand with my communication major. I will constantly be in situations where I must use skills I have learned from my major to communicate with others. I will then return to finish out my senior year at HSU. After school I can see myself opening up my own business, and continuing to peruse my passion to travel. I greatly appreciate the opportunities I have been given through the Kachemak Bay Medical Clinic Scholarship. It has made my educational goals much more attainable.



Kaya Morelli received a \$1,500 from the Alain and Daniel Rieser Scholarship for graduates with an interest in foreign language, culture and travel. Morelli plans to use the scholarship for travel to Chile. She has a blog at 59nto39s.blogspot.com where she recently posted this:

After receiving the Alain and Daniel Rieser travel award I knew for certain I was going to the southern hemisphere, specifically Chile, southern Chile. Since that moment sitting in the Homer High School commons with many other students receiving scholarships and awards I have been writing to-do lists. Buy ticket. First go commercial fishing for two months to try and make some travel money. Try to get a mileage ticket. Fail at finding any mileage tickets since I procrastinated

for so long. Recruit some friends to come with me. Finally buy a ticket that can be covered by the award, which I am incredibly grateful for. Register to vote and apply for an absentee ballot. Have homework because now I must research the ten United States Representative candidates that I know nothing about. Oh yeah, and apply for colleges/universities. Which leads to writing numerous essays and paperwork. And application fees. And transcripts and SAT scores. Then I need to fit in a day of mountain biking down Grace Ridge (3000ft or 915m) on that one partly cloudy day out of the weeks of torrential down pour. Can't forget to have fun, like taking a road trip in an overly packed Subaru to one of your best friends cabins in McCarthy to spend a week with buddies celebrat-

ing life. Now it's trying to rapidly learn critical phrases in Spanish and contacting people in Chile. Tomorrow I will attempt to pack the necessary for three months into my little 30 liter backcountry backpack. Then on the 3rd I'm out of Homer.



IN THE NEWS

More Alaskans using Pick. Click. Give

Alaskans gave charitable gifts to their favorite nonprofit causes through Pick.Click.Give in record numbers this year, according to data provided by the Permanent Fund Dividend Division of the Alaska State Department of Revenue. Over 23,000 individuals pledged over 37,000 gifts to over 400 nonprofit organizations totaling \$2,200,800. These figures

represent an increase of nearly 50 percent over last year's total. This 4.2 percent participation rate makes Alaska's Pick.Click.Give program one of the most successful statewide fundraising campaigns in the United States.

The Homer Foundation continues to benefit from the generosity of Alaskans who have chosen to Pick.Click.Give when

filing for their Permanent Fund Dividend. We encourage you to join the thousands of Alaskans that use their PFD as an easy and secure way to make charitable contributions to their favorite causes. When you do, please consider including the Homer Foundation.

Turn property gains into Community Good

Making a charitable gift of real estate through the Homer Foundation can help you turn your property gains into community good. The value of your real estate may exceed any other asset you own. With the help of the community foundation, you can use it to fulfill your charitable interests and receive financial and tax benefits. The real estate will be assessed for compliance with the foundation's acceptance poli-

cies. Once accepted, the gift will qualify for a tax deduction based on its full market value so you avoid the capital gains tax that would otherwise arise from the sale of property.

Your gift can be placed into any of the foundation's charitable funds. For example, you can use your gift to create a Donor Advised Fund in your name, in the name of your family or business, or in honor of any person or

organization you choose, and you can stay involved by making grant recommendations. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

Contact the Homer Foundation for more information on how to make a gift of real estate, or other appreciated property.

Kachemak Bay Books

The Homer Foundation's book, *Kachemak Bay*, was first released in December 2005 to raise funds for and awareness of the Homer Foundation. The book, which contains 67 color photographs, nine historic photos, essays and poems by local writers, and

captions by naturalist Daisy Lee Bitter, continues to be a popular gift for locals and visitors alike. The book retails for \$19.95 and is available from the Homer Foundation, the Homer Bookstore and many other area gift shops.



Daisy Lee Bitter, friend, naturalist, foundation donor, and contributor to the Foundation's book, *Kachemak Bay*.



After school activities at Homer Middle School are supported by the David and Mary Schroer fund.

A STORY OF YOUTH

6

Youth Advisory Committee Report

When going through life, there are many, many challenges that one must overcome. Sometimes we can overcome them ourselves, but other times we can't. Things get disorganized and fall apart, and a helping hand can make all the difference in the world. Everyone, even kids, need help constructing the next part of their life every once in a while, and that is when the Youth Advisory Committee is more than happy to offer assistance.

What is philanthropy? It is a word rarely used by the younger generations, and even less often demonstrated. According to the dictionary, philanthropy is the concern for human welfare and advancement, but in YAC we take it one step farther and act upon that concern and give others a helping hand in building their future.

Every year, new members and old find time to gather together, despite our plethora of conflicts, and resolve to help our community. Once a month, every month in the school year, on one of the few days when everyone doesn't have sports, jobs, college applications, homework, or family commitments to deal with, or isn't volunteering at the Pratt or elsewhere, YAC can be found hard at work discussing what to do next for Homer's youth. Although these meetings are usually productive, occasionally it is a challenge to get a large group of teenagers to agree on anything.

Somehow though, usually thanks to Advisor, Bonnie Jason, a feeling of order is established and then, with the help and support of other members, our ideas begin to take form, piece by piece. The end result is an impressive list of projects that when connected, support a wide array of activities for Homer area youth. A total of \$8720 was awarded to the following:

- Big Brothers Big Sisters for Match Activities
- Project GRAD for the Summer Institute and Homer Middle School Bridge projects
- Popeye Wrestling for new wrestling mats at Homer Middle School
- Friends of the Homer Library for the Summer Reading Program for Teens
- Homer Wilderness Leadership (HoWL) for Clean-up Week
- The REC Room for the Fork Club
- The Center for Youth Ski Equipment
- Homer Little League for a new Batting Cage
- Homer Imagination Library for Books

We have a slightly smaller group this year, but we are always inviting new members to keep the spirit of YAC, and philanthropy, alive in Homer. I have found that each year I look forward to YAC even more than I did the previous year. I am sad that this will be my last year, but I feel confident and happy to know that the future of our youth is in such good hands. Even though our members may graduate and leave us behind, their ideas, memories and accomplishments are still upheld by those that remain. When I look at the members I am leaving behind, and the wonderful community we live in, I'm certain there will be support for those who need help building up their lives on the road to a brighter future.

By Sam Reinert,
VETERAN YAC MEMBER AND SENIOR AT HOMER HIGH SCHOOL

WAYS OF GIVING

BUILDING COMMUNITY ASSETS FOR TODAY, AND FOREVER.

The Homer Foundation provides a simple, powerful, and highly personal approach to giving. We offer a variety of tools to help you achieve your charitable goals. Donating to or through the Homer Foundation is easy. Your contribution in any amount, directed to any of the funds managed by the Foundation, help us grow and expand our support of the communities on the southern Kenai Peninsula. With a gift of \$10,000 or more, you may choose to create your own named fund as a permanent legacy for the community, either during your lifetime, or through a bequest.

CASH GIFTS

Cash is the simplest way to contribute to or through the Homer Foundation. Gifts of cash can be made directly to the Foundation or via credit card on our website at homerfund.org. The newest way for Alaskans to make charitable gifts is through Pick.Click.Give., the Alaska Permanent Fund Charitable Check-Off Program.

NON-CASH GIFTS

Donating appreciated assets such as real estate, publicly traded stocks, art work, fishing permits/boats, or other investments can save the donor significant capital gains tax liability, and the assets will be put to work to meet community needs.

PLANNED GIFTS & BEQUESTS

The Homer Foundation can accept planned giving vehicles such as charitable trusts, charitable gift annuities, life insurance policies, and retirement plans. A bequest to the Homer Foundation is simple to include in your will, and we can provide sample language for you and your legal counsel. If you plan to leave a planned gift to the Foundation please be sure to let us know so we can make sure to have your wishes on record.

PRIVATE FOUNDATIONS

Starting a fund at the community foundation can achieve the same philanthropic goals as a private foundation. You may want to consider working under the umbrella of the community foundation. You may receive superior tax benefits while saving on expense and management structure.

MORE INFORMATION?

We encourage donors to review their financial plans with their professional advisors. For more information and ideas on ways to integrate your financial planning with charitable giving ask your financial advisor or contact the Homer Foundation. We can provide a free phone consultation with a planned giving professional through our partnership with the Foraker Group.

CONNECT WITH US

Contact us to find out how we can help you achieve your philanthropic goals. Phone 907.235.0541, or stop by the office, we are located in the lower level of the Kachemak Bay Title Building at 3733 Ben Walters Lane in Homer. You can also connect with us via email at info@homerfund.org or online at www.homerfund.org.

Anyone may make a tax-deductible contribution to the Homer Foundation. Use the self-addressed envelope included in this annual report, go to our website at homerfund.org and click on the DONATE NOW button, or use the Pick.Click.Give. charitable check-off option when you file for your Alaska Permanent Fund Dividend. Your gift will be gratefully acknowledged, and a written receipt provided for tax purposes. The beneficiary fund will be notified unless you choose to remain anonymous. Do contact us should you need more information, wish to make a non-cash donation, or establish a named fund of your own, 907.235.0541.

THE HOMER FOUNDATION FAMILY OF FUNDS:

THE HOMER FOUNDATION

The Homer Foundation Unrestricted Fund
 Julia Park Howard (Strydom) Unrestricted Fund
 The Homer Foundation Admin Fund
 The Aquila Fund
 The Homer Foundation Endowment Fund at the
 Alaska Community Foundation

AGENCY ENDOWMENT FUNDS

Alaska Marine Conservation Council Fund
 Center for Alaskan Coastal Studies Fund
 Homer Animal Friends Fund
 Homer Council on the Arts Fund
 Homer Public Library Fund
 Hospice of Homer Fund
 Kachemak Bay Family Planning Clinic Fund
 Kachemak Heritage Land Trust Fund
 KBBi-Bev Munro Endowment Fund
 Pratt Museum Fund

FIELD OF INTEREST FUNDS

Jessica Stevens Memorial Fund - youth performing
 & visual arts
 Brother Asaiah Bates Fund – youth at risk through
 Homer Head Start
 Homer/Kachemak Bay Rotary Club Fund - Rotary
 community service projects
 Rotary Club of Homer Downtown Fund - Rotary
 community service projects
 City of Homer Fund – operating support to nonprof-
 its serving Homer
 Ashley J. Logan Fund – benefits Homer area youth
 Kachemak City Fund - benefits area residents
 Choices for Teens Fund - supports prevention, inter-
 vention and support for youth at risk
 Kevin Bell & Family Hockey Fund – supports entry
 level ice hockey programs
 Sheldon Youth to Youth Fund – supports HF Youth
 Advisory Committee grantmaking

Constance M. Benston Fund – supports music edu-
 cation and cat care at animal shelter
 A Music Education Fund in Memory of Renda Horn –
 supports music and music education

SCHOLARSHIP FUNDS

Alice Witte Memorial Scholarship - HHS women's
 volleyball team member
 Homer Community Science Scholarship Fund - HHS
 seniors, for life sciences
 Diane Wambach "Shoot for the Stars" Scholarship
 Fund - college or career training
 A.W. "Bill" Johnson Teacher Education Scholarship
 Fund - teacher education
 Health Care Providers Scholarship Fund - healthcare
 field
 Kachemak Bay Medical Clinic Fund - rewards aca-
 demic excellence and strong work ethic
 Drew Scalzi Memorial Maritime Scholarship Fund -
 support for students of fishing families or students
 going into the maritime industries
 Ptarmigan Arts Scholarship Fund – further arts edu-
 cation for high school students

DONOR ADVISED FUNDS

Steve and Noko Yoshida Fund
 Homer Incentive Fund
 Jack and Mary Lentfer Fund
 Daisy Lee Bitter Marine and Coastal Education Fund
 The KLEPS Fund
 The Cottonwood Fund
 David and Mary Schroer Fund
 Tin Roof Fund
 Gooseberry Fund
 Jane Little Family Endowment Fund
 Jenson Fund
 Compass Rose Fund
 May M. Benson Charitable Fund
 The Willow Fund



A STORY OF MUSIC

7

Jazz in the Cove at Quiet Place Lodge

Building on the success of last year's Jazz in the Cove event, the generous folks at Quiet Place Lodge in Halibut Cove hosted two more Jazz in the Cove events this summer to support the Homer Foundation.

Each event included transportation across the bay aboard the Discovery with champagne and oysters, a fabulous seafood dinner, and a concert of amazing live jazz music, all in the idyllic setting of Quiet Place Lodge in Halibut Cove. To top it off, during one of the wettest summers in recent memory, we managed not to get rained on!

The July 7th Jazz in the Cove event featured a jazz trio with Peggy Stern on piano, Sweet Sue Terry on sax and clarinet, and Bob Ramponi on bass. The July 21st event featured the Dan Mac Quintet. Both concerts kept jazz lovers' toes tapping.

Our hats are off to Quiet Place Lodge and staff, the Kachemak Shellfish Grower's Cooperative, and the Discovery for their support of this amazing fund- and friend-raising opportunity. Check out halibutcove.live.com for future events.



A STORY OF
GROWTH

8

Investment Report

The overall performance of the Homer Foundation Schwab investment account, including call strategy income, for fiscal 2012 showed a gain of 5.23%, significantly beating our benchmarks.

For the fiscal year ended 06/30/2012

Alaska Permanent Fund.....	0.02%
TIFF (The Investment Fund for Foundations).....	0.52%
S&P 500.....	3.06%
Dow Jones Industrial Average.....	3.05%
Homer Foundation Schwab Trading.....	5.23%

More noteworthy than this modest gain was the outsized income generated by our investment manager. Income earned from our covered call strategy was \$254,497, which combined with interest and dividend income of \$36,892 gave us a total income of \$296,389, all of which will be available this fiscal year for local charitable causes.

Our investment focus continues to be in the commodity sector with oil and precious metals our primary holdings. The stock market continues to respond favorably to the outside injection of capital designed to prop up the equity markets in the face of an ever deteriorating real economy. The national elections, just ended, will likely increase the volatility of the mix for the rest of this year and on into 2013. We continue to rely on our covered call strategy to generate outsized dividends for community charitable purposes. We are grateful for all of the support our donors have shown over the last 20 years and pledge to continue to do our best to achieve another year of excellent performance.

Ken Castner and I continue to hold open meetings on the first Friday of each month at noon in the Foundation board room and any members of the public are welcome to attend. At these meetings we review our holdings, exchange ideas and present articles relative to our investment strategy and the prognosis for the economy going forward. Again thanks for your support. If you have any questions on any of this please feel free to contact me for more information.

Phil Morris,
INVESTMENT COMMITTEE CHAIR

UNRESTRICTED FUNDS

Total of 289,277

Homer Foundation Unrestricted	113,368
Homer Foundation Admin	74,062
Aquila Fund	101,846

AGENCY ENDOWMENT FUNDS

Total of 379,790

Alaska Marine Conservation	12,325
Center for Alaskan Coastal Studies	34,667
Friends of the Homer Public Library	104,971
Homer Animal Friends	18,528
Homer Council on the Arts Fund	12,106
Hospice of Homer Fund	60,450
Kachemak Bay Family Planning	12,348
Kachemak Heritage Land Trust	42,686
KBBI-Bev Munro Endowment	37,917
Pratt Museum Fund	43,794

FIELD OF INTEREST

Total of 510,654

A Music Education Fund In Memory of Renda Horn: The Horn Section	26,914
Alice Witte Memorial Scholarship Fund	12,895
Ashley J. Logan Fund	69,183
A.W. "Bill" Johnson Teacher Education Fund	5,069
Brother Asaiah Bates Fund	10,925
Choices for Teens Fund	17,671
City of Homer Fund	185,243
Constance M. Benston Fund	15,608
Diane Wambach "Shoot for the Stars" Scholarship Fund	3,424
Drew Scalzi Memorial Maritime Scholarship Fund	32,408
Health Care Providers Scholarship Fund	17,386
Homer Community Science Scholarship Fund	23,224
Homer-Kachemak Bay Rotary Club Fund	23,622
Jessica M. Stevens Memorial Fund	12,405
Kachemak Bay Medical Clinic Scholarship Fund	7,650
Kachemak City Fund	14,240
Kevin Bell & Family Hockey Fund	6,207
Ptarmigan Arts Scholarship Fund	4,693
Rotary Club of Homer Downtown Fund	11,179
Sheldon Youth to Youth Fund	10,708

DONOR ADVISED FUNDS

Total of 936,006

Compass Rose Fund	13,442
Daisy Lee Bitter Marine & Coastal	17,873
David and Mary Schroer Fund	145,532
Homer Incentive Fund	27,110
Jack and Mary Lentfer Fund	19,211
Jane Little Family Endowment	48,764
May Benson Charitable Fund	63,773
Steve and Noko Yoshida Fund	70,797
The Cottonwood Fund	68,521
The Gooseberry Fund	16,337
The Jenson Fund	71,854
The KLEPS Fund	77,113
The Tin Roof Fund	202,870
The Willow Fund	92,806

OTHER

Total of 277,157

Restricted Funds	130,115
Non Cash Assets	-30,998
Earnings Pending Distribution	178,040
Total Assets Under Management	2,392,884
Less Funds Held for Others	-354,408
Total Net Assets	2,038,476

FY12 Financial Summary, unaudited

REVENUE AND SUPPORT

2012

Contributions	617,887
Net Earned Income	9,600
Investment Gains (Losses) *	(147,623)
Distributable Investment Earnings	291,389
Total Revenue and Support	771,254

EXPENSES

Grants from Participating Funds	136,863
Grants from Restricted Funds	281,294
Other Distributions	53,180
Personnel **	48,224
Operating & Program Expenses	35,221
Total Expenses	554,782

Increase/Decrease in Net Assets	216,472
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Donated Goods and Services	24,211
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*Realized & Unrealized Gains(Losses)

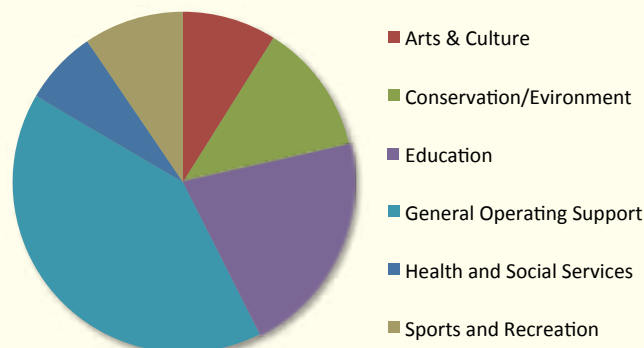
**Salary, Taxes, Benefits paid from unrestricted funds

Net Assets as of July 1, 2011	1,822,003
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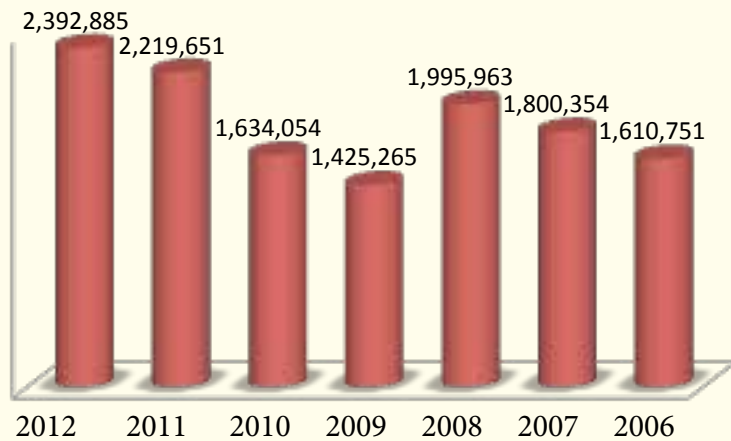
Net Assets as of June 30, 2012	2,038,475
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The Homer Foundation's investments are managed by board member Ken Castner, working closely with the Investment Committee, chaired by Phil Morris. Audited Financial Statements are available upon request, as are IRS Form 990 (or 990T)

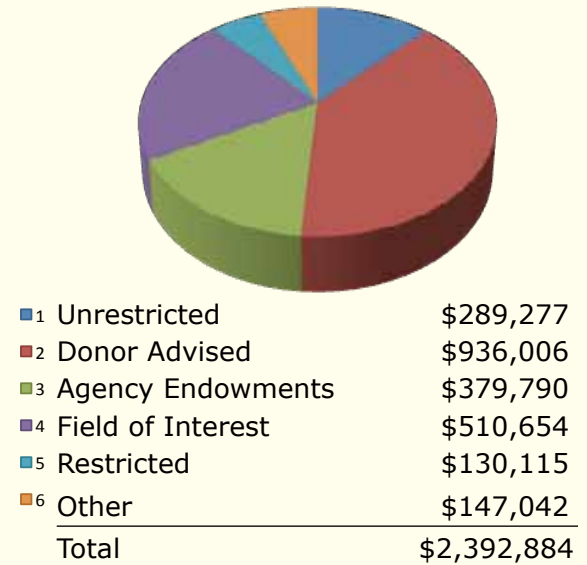
GRANT DISTRIBUTED BY CATEGORY



ASSETS UNDER MANAGMENT



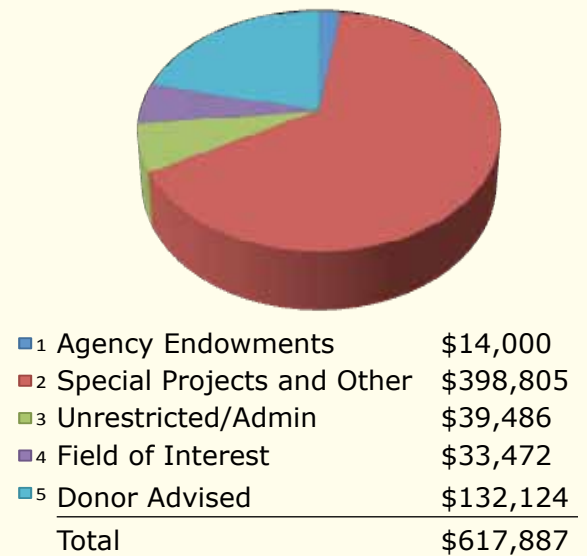
MANAGED ASSETS BY FUND TYPE



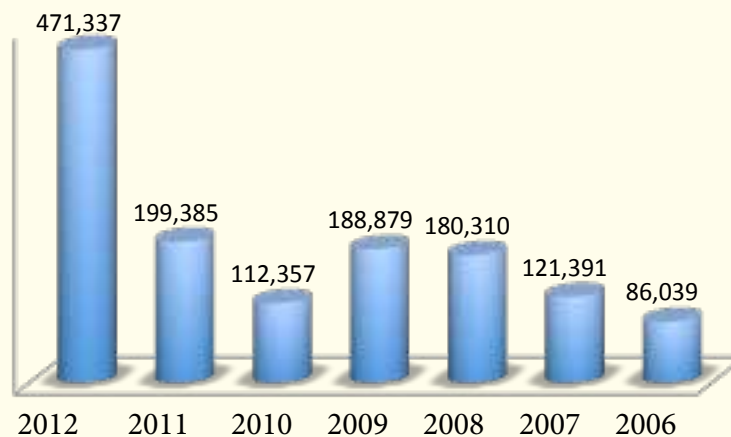
CONTRIBUTIONS



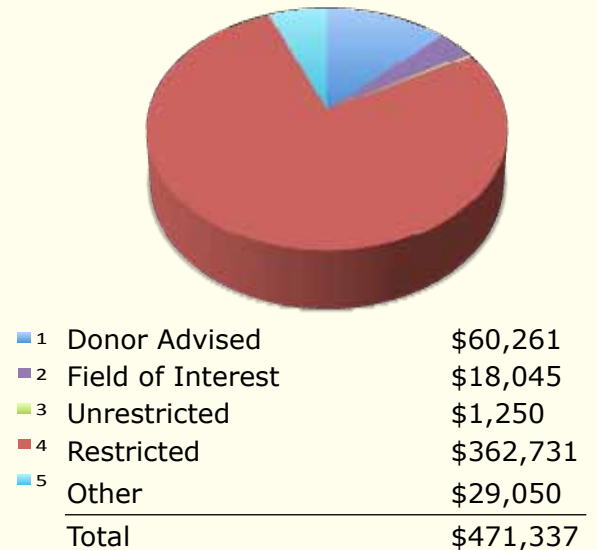
CONTRIBUTIONS BY FUND TYPE



DISTRIBUTIONS



DISTRIBUTIONS BY FUND TYPE



A STORY OF BEGINNINGS

Foundation Welcomes Three New Funds

PTARMIGAN ARTS SCHOLARSHIP FUND

The Ptarmigan Arts Gallery is a cooperatively run art gallery that has supported budding artists in the community for many years. Recently the member artists made the commitment to raise additional funds and establish a permanently endowed scholarship fund at the Homer Foundation. They elected to build the Ptarmigan Arts Scholarship Fund over time, what we call an Acorn Fund. When the fund reaches the \$10,000 minimum, they will use the earnings to support the annual scholarship awards. Anyone wanting to support their efforts should be sure and attend their annual Ptarmigan Arts fundraiser.

THE WILLOW FUND

The Homer Foundation was able to work with these donors to help them retain anonymity while meeting their philanthropic goals of giving back to the community. The result is the new Willow Fund, a donor advised fund at the Homer Foundation. As the donors explained, the name Willow was selected because of its prevalence in our environment, its inherent beauty, and its many uses and attributes. Similarly, support from the new Willow Fund will touch many areas of our community. The first award from the Willow Fund has supported an artist in residence program administered by the Bunnell Street Arts Center.

HOMER COMMUNITY CHEST

The establishment of this non-permanent fund was triggered by a very generous anonymous donor interested in assuring the safety net is there for families in need in our community. The Homer Foundation manages the fund, making distributions to community partners like the Homer Community Food Pantry and Share the Spirit. Additional contributions continue to come into the fund, and to date over \$9000 have been distributed. Last winter saw an extreme need for heating fuel, utilities and emergency housing. Unlike a permanent endowment, 100% of the Homer Community Chest funds will be disbursed annually, and replaced by concerned and caring community members. If you would like more information on how you can support Homer's Community Chest contact the Homer Foundation.

The Homer Foundation FY12 Donations by Fund Type



*Dirt Bag Clean-up Week:
HOWL*

UNRESTRICTED FUNDS:

Homer Foundation
Unrestricted Fund
Alaska Community
Foundation
Ann & Ron Keffer
Anonymous
Anonymous
Anonymous
Anonymous
Arlene & Don Ronda
Aunnie Steward
Bill Palmer & Shirley
Fedora
Bonnie Jason and David
Schneider
BP Fabric of America Fund/
David Scott
BP Foundation matching
employee gift/B. Palmer
Buck & Shelly Laukitis
Bruce Hess & Polly Prindle-
Hess
Carol Swartz
Claudia Haines

Daniel Westerburg,
Attorney at Law
Dave & Beth Schroer
Diane Kaplan
Diane & Mike McBride
Don & Mary Sanders
Ed Bailey & Nina Faust
Elaine Grantier
Heidi & Tim Stage
IBM Employee
Contributions/ Robert
Burns
IBM Employee
Contributions/Leslie
Belsher
Jack & Mary Lentfer
James Lepley
James & Brenda Dolma
Janie Stewart
Jenny Carroll & Paul
Dungan
Jo & Peter Michalski
Joy Steward & Stuart
Schmutzler
Judith Nestor & Bob Burns
Julia Clymer & Karl Stolfus
Karen Berger & Steven
McCasland/Homer
Brewing Co.
Keith Brownsberger, MD
Lee & Sandy McDaniel
Lew Ulmer
Libby Veasey
Lisa Fellows
Lucy Cutting
Margaret Jacobs
Maynard Gross
Mel & Nadia Strydom/Grog
Shop
Michelle Gordon
Michael & Kathy Pate
Milli Martin
Nancy Lord & Ken Castner
Nancy Levinson
Phil Morris
Rachel Bilbo
Richard & Nell Gustafson
Ron & Turid Senungetuk

Shawn Hansen
Steve and Vicki Albert
Steven Glassman
Teresa Sundmark
Theodore "Patrick"
Schneider
Tom Kizzia
Victoria Steik
Walter Johnson
Zelda Collett-Paule

Julia Park Howard
Unrestricted Fund
Virginia Howard Mullan
Donald & Clara Schock
Henry Hill

AGENCY ENDOWMENT FUNDS:

Bev Munro-KBBI Endowment
Fund
Anonymous

Friends of the Homer Public
Library Fund
Anonymous
Anonymous
Mary Lou Burton

The Homer Foundation
Aquila Fund
Anonymous
Anonymous
Dave & Beth Schroer
Nancy Lord & Ken
Castner

Kachemak Bay Family
Planning Clinic Fund
Anonymous

DONOR ADVISED FUNDS:

Compass Rose Fund
Buck & Shelly Laukitis

Jane Little Family Endowment
Fund
Jane Little

The Cottonwood Fund
Nancy Lord & Ken Castner

The KLEPS Fund
Paul & Tina Seaton

The Willow Fund
Anonymous

FIELD OF INTEREST FUNDS:

A Music Education Fund in
Memory of Renda Horn: The
Horn Section
Carol Comfort-Waldorf/
Penny Pond Music Camp

Doug Reid & Karen
Northrop
E. Margaret Brummell
Roger & Denice Clyne
Ron & Ann Keffer
Steve Horn

Brother Asaiah Bates Fund
Homer Head Start Program

Drew Scalzi Memorial
Maritime Scholarship Fund
Barb Scalzi & Family

Health Care Providers
Scholarship Fund
Anette Avant, Kenai
Physical Therapy
Bernadette Arsenault
Bill Roberts
Christine Anderson
Douglas and Jocelyn
Westphal



Kodiak Trip: Girl Scout Troupe 137

Dr. Bill Bell & Mary Lou
Kelsey
Dr. Bill & Judy Marley
Dr. Bobbie Behrens
Dr. Dots Sherwood/Homer
Veterinary Clinic
Dr. Ed & Janice Todd
Dr. Hal & Susan Smith
Dr. Jim Heston
Dr. Jim Meesis
Dr. Lawrence & Cheryl
Reynolds
Dr. Maureen Filipek
Dr. Susan McCoy
Dr. Susan Polis/Preventive
Dentistry
Dr. Zoubek
Emilie Otis
George Rhyneer & Marilyn
McKay
Karen Northrop & Doug
Reid
Kim Greer
South Peninsula Hospital
Medical Staff

Continued Page 23



New music purchase: Homer Youth String Orchestra Club



Science Conference: Kachemak Bay Research Reserve

Josephine Schawillie
Law Office of Andy Haas
& Terri Spigelmyer
Tim & Lisa Whip and
Family

DONOR DESIGNATED CONTRIBUTIONS/ SPECIAL PROJECTS

Alaska Community
Foundation
Ken Castner

Alaska Conservation
Foundation
Nancy Lord

City of Homer Grants
Program
City of Homer

Community Asset
Building Initiative
Larry & Colleen Riley
Nancy Lord & Ken
Castner

Homer Community
Education
State of Alaska
Legislative Grant

Homer Community Chest
Anonymous
Michelle Wilson & Sean
Hogan
Phil Morris

Homer Families First
Best Beginnings Grant
Bonnie Betley

Homer Imagination Library
Best Beginnings Grant
Betty Hunter

Dennis & Sandra Ghormley
Diane Hughes
Dr. Susan Polis
Friends of the Homer Public
Library
Holly Maryott
Homer Kachemak Bay
Rotary Club
Jan O'Meara
Sprout Family Services
plus misc. contributions cash
contributions

IN-KIND CONTRIBUTIONS

Ken Castner, Tonsina, LLC
Foster & Company, CPA



*Cat Care: Homer Animal
Friends*

Steve & Cheryl Rykaczewski
Steve & Shara Sutherlin

Homer Community Science
Scholarship Fund
Curt & Lorna Olson
Nancy Levinson

Homer Kachemak Bay Rotary
Club Fund
Homer Kachemak Bay
Rotary Club

Kachemak Bay Medical Clinic
Scholarship Fund
Dr. Paul Raymond

Kevin Bell and Family Hockey
Fund

Mary Ferguson Bell & Family
Neil & Teresa Ferguson
Don & JoAnn Ferguson

Ptarmigan Arts Scholarship
Fund
Ptarmigan Arts Gallery

Rotary Club of Homer
Downtown Fund
Rotary Club of Homer
Downtown

YAC - HF Youth Advisory
Committee and Sheldon Youth
to Youth Fund
Bruce Petska
David & Mary Schroer Fund
Harmon & Pauli Hall

MAJOR DONORS TO HOMER PLAYGROUND PROJECT

Anonymous
BP
Carlile Transportation
Systems
City of Homer
ConocoPhillips Alaska
Horizon Lines of Alaska
Lynden
Rasmuson Foundation
State of Alaska
Alaskan Coastal Freight
Anonymous
Dibble Creek Rock Ltd.
Homer Foundation
Jim Hornaday
K-Sea Transportation
South Peninsula Hospital
Spenard Builders Supply
Wells Fargo
Alyeska Tire
Amy & Philip Alderfer
Angie Newby / Homer Real
Estate
Apache Alaska Corporation

Bay Welding
Beachy Construction, Inc.
Bear Creek Winery and
Lodging
Beluga Lake Lodge
Best Western Bidarka Inn
Bob Shavelson & Miranda
Weiss
Church on the Rock Homer
Patrick Ahern & Chris
Kulcheski
Dots Sherwood / Homer
Veterinary Clinic
East Road Services
Escopeta Oil
Federation of American
Consumers and Travelers
First National Bank Alaska
General Buckner American
Legion Post 16
Gregoire Construction
The Grog Shop
Homer Chamber of
Commerce

Homer Electric Association
Homer Insurance Center
Homer Medical Clinic
Homer Ministerial
Association
Icicle Seafoods
In Memory of May M.
Benson
K Martin Construction
K-Bay Marine Corps League
Detachment 838
Kachemak Board of Realtors
Kenneth Quinn
Land's End Resort
Maritime Helicopters
Northland Services, Inc.
On Demand Trucking
Pathfinder Aviation
Petro Marine Services
Seldovia Village Tribe
Susan & David Oesting
Teamsters Local 959
Tesoro
William J. Marley Jr. D.D.S.

Zoe & McKenna Black
Alaska State Employees
Association Local 52
Bald Mountain Air Service
Best Beginnings Homer
Ben, Mary & Sophia Park
Bev & Leo Nikora
Bob Evans
Cosmic Kitchen
Diane & Mike McBride
Era Aviation
Fireweed Academy
Grant Aviation
Heather & Martin Renner
Homer Volunteer Fire
Department
Kachemak Boat Yard &
Rentals
Phil Morris
Robert Archibald & Roberta
Highland
The Saltry
Dr. William J. & Judy A.
Marley

The Homer Foundation FY12 Grants



Cold Water Safety Training: Homer Middle School

IMMEDIATE GRANTS:

Alaska Conservation Foundation - \$1,000
General Operating Support
Big Brothers Big Sisters - \$500 Community Awareness
Bunnell Street Arts Center - \$2,000 Artists in Residence Grant I
Bunnell Street Arts Center - \$2,000 Artists in Residence Grant II
Center for Alaskan Coastal Studies - \$4,000
Floating Dock for Peterson Bay
City of Homer - \$4,904
Climate Action Plan
Cook Inletkeeper - \$2,500

Watershed Monitoring
Cook Inletkeeper - \$530
Safe Drinking Water Program
Girl Scout Troup 137 - \$1,000 Scout Sail to Emerald Isle
Homer Animal Friends - \$1,000 General Operating Support
Homer Animal Friends - \$1,100 Homer Animal Shelter Cat Care
Homer Community Food Pantry - \$150 General Operating Support
Homer Community Food Pantry - \$3,000
Emergency Aide/Community Chest
Homer Council on the Arts - \$200 People's Choice

Summer Institute: Project GRAD



Grant Awards
Homer Council on the Arts - \$1,100 Constance Benston Music Scholarship
Homer Council on the Arts - \$3,000 FY12 Programming
Homer Flex School - \$3,000 Personal Responsibility & Planning
Homer Flex School - \$794 Nature Literacy Stewardship
Homer High School - \$1,000 Track Hurdles
Homer Middle School - \$1,360 Cold Water Survival Training
Homer Middle School - \$2,500 After School Activities
Homer Playground Project - \$4,000 Tot Lot Fort
Hospice of Homer - \$1,000 General Operating Support
HOWL - \$500 General Operating Support
Kachemak Bay Equestrian Assoc. - \$508 Cottonwood Horse Park Improvements
Kachemak Bay Planning Clinic - \$3,000 Autoclave: Medical Supply
Kachemak Bay Research Reserve - \$1,500
Community Science Conference
Kachemak Heritage Land Trust - \$1,500 Printer Replacement
Kachemak Nordic Ski Club - \$4,000 Grooming Equipment
Kenai Peninsula Borough School District - \$1,500 Project GRAD
Northern Communities Vitamin D Group - \$1,156.00 Vitamin D Project
Pratt Museum - \$1,000 General Operating Support
Pratt Museum - \$2,000 Prioritizing Collection Needs
Pratt Museum - \$2,940 High School Internship Program
Pratt Museum - \$3,000 Service to School Groups
Pratt Museum - \$4,000 Community Grey Whale Skeleton
Rotary Club of Homer Downtown - \$1,100



Kodiak Trip: Girl Scouts Troup 137

Share the Spirit - \$1,100
Emergency Aide/Homer Community Chest
Special Olympics of AK - \$1,003 Racing Snowshoe Purchase
Sustainable Homer - \$2,000
VISTA Volunteer
TEDx Homer - \$1,000 Heart Matters
TEDx Homer - \$1,750 Let's Play

CITY OF HOMER GRANTS PROGRAM:

Bunnell Street Arts Center - \$4,200
Center for Alaskan Coastal Studies - \$4,000
Cook Inletkeeper - \$2,000
Homer Community Food Pantry - \$5,000
Homer Council on the Arts - \$5,000
Hospice of Homer - \$5,000
Kachemak Heritage Land Trust - \$2,500
Kachemak Kids Learning Center - \$2,800
Kachemak Nordic Ski Club - \$4,000

Continued Page 25



New climbing equipment: HOWL

SCHOLARSHIP RECIPIENTS:

Alain and Daniel Rieser Scholarship

Dan Adickes - \$3,000
Kaya Morelli - \$1,500

Alice Witte Memorial Volleyball Scholarship

Zoia Basargin - \$500

A.W. "Bill" Johnson Teacher Education Scholarship

Erik Rosencrans - \$1,000
Beluga Writing Scholarship
Mallory Drover - \$3,000
Kyle Wentz - \$3,000

Diane Wambach "Shoot for the Stars" Scholarship

Aurora Roderick - \$500
Fallin Crauthers - \$500

Drew Scalzi Memorial Maritime Scholarship

Verinia Reutov - \$1,000
Shlomo Gherman - \$500

Health Care Providers Scholarship

Mallory Drover - \$500
Rayann Clutts - \$500
Jenna Kropf - \$500
Marta Todd-Hashagen - \$500

Homer Community Science Scholarship

Lauren Cashman - \$1,000
Marie Schmidt - \$750
Dana Olesch - \$500
Sarah D'Water - \$500

Kachemak Bay Medical Clinic Scholarship

Rayann Clutts - \$500

HF YOUTH ADVISORY COMMITTEE (YAC) GRANTS:

Best Beginnings/Homer Imagination Library - \$740.00 Imagination Library
Big Brothers Big Sisters - \$500 Supports Match Activities
Friends of Homer Public Library - \$600 Summer Reading Program
Homer Little League - \$800 Batting Cages
HOWL - \$680 Clean-up Week
Kachemak Bay Family Planning Clinic - \$1,550
REC Room Fork Club
Kenai Peninsula Borough School Dist. - \$1,250

Project GRAD

Popeye Wrestling Club - \$1,500 New Wrestling Mats

The Center - \$1,100 Youth Ski Equipment

EMPLOYEE MATCHING GRANTS:

Big Brothers/Big Sisters - \$50 Employee Matching Grant

AGENCY ENDOWMENT FUND EARNINGS:

Alaska Marine Conservation Council - \$1,021
Aquila Fund/ Homer Foundation - \$6483
Center for Alaskan Coastal Studies - \$2,000
Friends of the Homer Public Library - \$7,170
Homer Animal Friends - \$1,557
Homer Council on the Arts - \$941
Hospice of Homer - \$5,045
Kachemak Bay Broadcasting Inc. - \$2,851
Kachemak Bay Family Planning Clinic - \$768
Kachemak Heritage Land Trust - \$3,207
Pratt Museum - \$3,602

AVAILABILITY OF GRANTS:

Grant applications and guidelines are available at www.homerfund.org.

Call or email for more information:

907.235.0541

info@homerfund.org



Nature Literacy: Flex School

HOMER FOUNDATION BOARD OF TRUSTEES



Bonnie Jason
YAC Advisor



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Audit Committee
Co-chair



Elaine Grantier



John Mouw
Distribution
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Polly Hess



Mike Pate



Phil Morris
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Steve Albert
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Carol Swartz
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Dan Westerberg
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Joy Steward
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Cindy Birkhimer
Volunteer



Heidi Stage
Bookkeeping
Assistant



Julia Clymer
Bookkeeper

THE HOMER FOUNDATION
PO Box 2600
Homer, AK 99603

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US POSTAGE PAID
HOMER AK
PERMIT # 15

OR CURRENT RESIDENT



TO FIND OUT MORE

web site: www.homerfund.org

e-mail: info@homerfund.org

Phone: 907-235-0541

Fax: 907-235-2021

DESIGN BY CAREY RESTINO