Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning JUN 1, 2009 , and ending MAY 31, 2010

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return
[ ] Amended return [ ] Address change [ ] Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
ROBERT AND FRANCES CHANEY FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
PO BOX 840

City or town, state, and ZIP code
JACKSONVILLE, OR 97530

A Employer identification number
20-5052365

B Telephone number
(541) 899-9199

C If exemption application is pending, check here ▶ [ ]
D 1 Foreign organizations, check here ▶ [ ]
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 7,665,389.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify)
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	10,000.		N/A	
	2 Check ▶ [ ] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	323,595.	323,595.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<541,093.>			
	b Gross sales price for all assets on line 6a 2,064,918.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total** Add lines 1 through 11	<207,498.>	323,595.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages	31,042.	0.		31,042.
	15 Pension plans, employee benefits				
	16a Legal fees STMT 2	4,011.	0.		4,011.
	b Accounting fees STMT 3	4,085.	2,042.		2,042.
	c Other professional fees STMT 4	51,383.	49,271.		2,112.
	17 Interest				
	18 Taxes STMT 5	7,431.	0.		7,431.
	19 Depreciation and depletion				
	20 Occupancy	11,160.	0.		11,160.
	21 Travel, conferences, and meetings	3,470.	0.		0.
	22 Printing and publications				
	23 Other expenses STMT 6	9,979.	0.		9,979.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	122,561.	51,313.		67,777.
	25 Contributions, gifts, grants paid	355,368.			355,368.
	26 **Total expenses and disbursements.** Add lines 24 and 25	477,929.	51,313.		423,145.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<685,427.>			
	b **Net investment income** (if negative, enter -0-)		272,282.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

RECEIVED
OCT 12 2010
OGDEN, UT
IRS-OSC

923501
02-02-10 LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions. Form **990-PF** (2009)

10581001 139211 10143 2009.02050 ROBERT AND FRANCES CHANEY F 10143__1

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	49,571.	98,040.	98,040.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ 16,482.			
	Less: allowance for doubtful accounts ▶	2,614.	16,482.	16,482.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	134.	2,724.	2,724.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	9,836,304.	8,623,318.	7,049,068.
	c Investments - corporate bonds STMT 8	32,691.	495,255.	499,075.
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	9,921,314.	9,235,819.	7,665,389.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ OREGON TAXES DUE)	1,002.	934.	
	23 Total liabilities (add lines 17 through 22)	1,002.	934.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	9,920,312.	9,234,885.	
	30 Total net assets or fund balances	9,920,312.	9,234,885.	
	31 Total liabilities and net assets/fund balances	9,921,314.	9,235,819.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	9,920,312.
2	Enter amount from Part I, line 27a	2	<685,427.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	9,234,885.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,234,885.

Form **990-PF** (2009)

923511
02-02-10

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHED SCHEDULE	P		
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	2,064,918.		2,606,011.	<541,093.>
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				<541,093.>
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } — 2 — <541,093.>

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 — 3 — N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	455,335.	7,418,003.	.061382
2007	594,755.	10,438,197.	.056979
2006	155,508.	9,714,211.	.016008
2005			
2004			

2	Total of line 1, column (d)	2	.134369
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.044790
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	7,731,341.
5	Multiply line 4 by line 3	5	346,287.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,723.
7	Add lines 5 and 6	7	349,010.
8	Enter qualifying distributions from Part XII, line 4	8	423,145.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary-see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b			1	2,723.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3 Add lines 1 and 2			3	2,723.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-			5	2,723.
6 Credits/Payments:				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,428.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c			
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	6,428.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	1.
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	3,704.
11 Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 2,724. **Refunded** ▶			11	980.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
If the answer is "Yes" to **1a** *or* **1b**, *attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OR			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.FAMILYFOUNDATIONCHANEY.ORG

14 The books are in care of ▶ CARRIE HANSON, EXECUTIVE DIRECTOR Telephone no. ▶ (541) 899-9199

Located at ▶ PO BOX 840, JACKSONVILLE, OR ZIP+4 ▶ 97530

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Line	Yes	No
1a During the year did the foundation (either directly or indirectly):					
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes	☒ No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ No			
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes	☒ No			
(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes	☒ No			
b If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	N/A		1b		
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐				
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?			1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):					
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes	☒ No			
If "Yes," list the years ▶ ______, ______, ______, ______					
b Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A		2b		
c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______					
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes	☒ No			
b If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	N/A		3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?			4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A | 5b |

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b |

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FRANCES CHANEY P.O. BOX 840 JACKSONVILLE, OR 97530	PRESIDENT 10.00	0.	0.	0.
SUSAN KRAMMER P.O. BOX 840 JACKSONVILLE, OR 97530	VICE PRESIDENT 5.00	0.	0.	0.
ROBIN WHITZEL P.O. BOX 840 JACKSONVILLE, OR 97530	SECRETARY/TREASURER 5.00	0.	0.	0.
JASON ANDERSON P.O. BOX 1667 MEDFORD, OR 97501	TRUSTEE 5.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	7,509,458.
b	Average of monthly cash balances		1b	339,619.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	7,849,077.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	7,849,077.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	117,736.
5	**Net value of noncharitable-use assets**. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	7,731,341.
6	**Minimum investment return**. Enter 5% of line 5		6	386,567.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6		1	386,567.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 2,723.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	2,723.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	383,844.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	383,844.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	383,844.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	423,145.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	423,145.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,723.
6	**Adjusted qualifying distributions**. Subtract line 5 from line 4	6	420,422.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				383,844.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			119,194.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 423,145.				
a Applied to 2008, but not more than line 2a			119,194.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				303,951.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				79,893.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see the instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

FRANCES CHANEY

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

SEE STATEMENT 9

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED SCHEDULE	NONE			355,368.
Total			▶ 3a	355,368.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	323,595.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	<541,093.>	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		<217,498.>	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 <217,498.>

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B **Relationship of Activities to the Accomplishment of Exempt Purposes**

Line No ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

923621 02-02-10

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Frances M. Chaney | 10-5-10 | President

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature	David P. Hyatt	Date 10/3/10	Check if self-employed ☐	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code	DAVID P HYATT CPA, PC 3551 E BARNETT ROAD; SUITE #105 MEDFORD, OREGON 97504		EIN	
			Phone no. (541) 773-9407	

Form **990-PF** (2009)

923622
02-02-10

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization	Employer identification number
ROBERT AND FRANCES CHANEY FAMILY FOUNDATION	20-5052365

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
ROBERT AND FRANCES CHANEY FAMILY FOUNDATION

Employer identification number
20-5052365

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	FRANCES CHANEY PO BOX 840 JACKSONVILLE, OR 97530	$ 10,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DA DAVIDSON	43,429.	0.	43,429.
UBS	280,166.	0.	280,166.
TOTAL TO FM 990-PF, PART I, LN 4	323,595.	0.	323,595.

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	4,011.	0.		4,011.
TO FM 990-PF, PG 1, LN 16A	4,011.	0.		4,011.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	4,085.	2,042.		2,042.
TO FORM 990-PF, PG 1, LN 16B	4,085.	2,042.		2,042.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	49,271.	49,271.		0.
PAYROLL MANAGEMENT	0.	0.		0.
OTHER PAYROLL EXPENSE	2,112.	0.		2,112.
TO FORM 990-PF, PG 1, LN 16C	51,383.	49,271.		2,112.

FORM 990-PF | TAXES | STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAX EXPENSE	2,793.	0.		2,793.
FEDERAL TAXES	3,704.	0.		3,704.
STATE TAXES	934.	0.		934.
TO FORM 990-PF, PG 1, LN 18	7,431.	0.		7,431.

FORM 990-PF | OTHER EXPENSES | STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE EXPENSE	2,004.	0.		2,004.
DUES AND SUBSCRIPTIONS	665.	0.		665.
UTILITIES	2,604.	0.		2,604.
OFFICE EXPENSE	587.	0.		587.
MISCELLANEOUS	80.	0.		80.
PUBLIC RELATIONS	2,693.	0.		2,693.
SUPPLIES	840.	0.		840.
MEETINGS	216.	0.		216.
TRAINING	290.	0.		290.
TO FORM 990-PF, PG 1, LN 23	9,979.	0.		9,979.

FORM 990-PF | CORPORATE STOCK | STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STOCKS	1,397,751.	1,434,988.
MUTUAL FUNDS	7,225,567.	5,614,080.
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,623,318.	7,049,068.

FORM 990-PF CORPORATE BONDS STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BONDS	495,255.	499,075.
TOTAL TO FORM 990-PF, PART II, LINE 10C	495,255.	499,075.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 9
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CARRIE HANSON
680 G STREET SUITE B
JACKSONVILLE, OR 97530

TELEPHONE NUMBER

(541)899-9199

FORM AND CONTENT OF APPLICATIONS

WRITTEN

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

DISTRIBUTIONS WILL BE MADE WHICH PRIMARILY BENEFIT OR HAVE EDUCATIONAL, HUMAN SERVICES, CHARITABLE, AND OTHER OTHER PURPOSES, WITH A PRINCIPAL FOCUS ON BENEFITTING CHILDREN AND FAMILIES AND PUBLIC SAFETY PERSONNEL AND THEIR FAMILIES WHO RESIDE IN THE GEOGRAPHIC AREAS OF SOUTHERN OREGON, BARRY COUNTY, MISSOURI, AND CABELL COUNTY, WEST VIRGINIA.
THE FOLLOWING ACTIVITIES ARE INELIGIBLE FOR FUNDING: ENDOWNMENTS OR ANNUAL FUND DRIVES, INDIRECT OR OVERHEAD EXPENSES, ORGANIZATIONS WITHOUT A 501(C)(3) TAX-STATUS DESIGNATION, SPONSORSHIP OF FUNDRAISING EVENTS, AND VISUAL AND PERFORMING ARTS PROGRAMS.

STATEMENT S226

Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 22I)

Organization. Robert & Frances Chaney Family Foundation
TIN. 20-5052365
Tax Year Ended· 5/31/20010

Form 990-PF, Part XV, Line 3a

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of recipient	Purpose of grant or contribution	Amount
1	Cassville Senior Center 1111 Fair Street Cassville, MO 65625	N/A	Active	Support the purchase of 150 dining room chairs	$ 2,471.00
2	Jacksonville Engine Company #1 180 N 3rd Jacksonville, OR 97530	N/A	Active	Support the purchase of portable radios for firefighter safety and operations.	$14,800 00
3	Medford School District 549C 500 Monroe ST. Medford, OR 97501	N/A	Active	Sponsorship of the NMHS Cheerleader Golf tournament which raises funds for cheer gear, tumbling & camp training.	$ 350 00
4	Muscular Dystrophy Association 1249 N. Riverside Medford, OR 97501	N/A	Active	Support the MDA Jerry Lewis Telethon	$ 5,000.00
5	Parkway Christian Center 229 NE Beacon Dr Grants Pass, OR 97526	N/A	Active	Provide food for the Royal Family Kids Camp.	$ 3,500.00
6	YMCA of Medford 522 W 6th Street Medford, OR 97501	N/A	Active	Support the work of the Rogue Valley Family YMCA	$ 5,000 00
7	SOASTC 715 SW Ramsey Ave. Grants Pass, OR 97526	N/A	Active	Support the purchase of playground and sports equipment for the residential facility in Merlin.	$ 5,000.00
8	Ashland Emergency Food Bank 550 Oak Knoll Ashland, OR 97520	N/A	Active	Purchase (approximately) a one-year supply of fresh eggs from Willamette Farms for distribution at the food bank.	$ 5,000 00
9	Butte Falls Community School Partnership P O. Box 358 Butte Falls, OR 97522	N/A	Active	Support the food pantry program for the Butte Falls community.	$ 5,000.00
10	Central Point Parks and Recreation Department 140 S. 3rd Street Central Point, OR 97502	N/A	Active	Assist in the purchase Automated External Defibrillator (AED) devices for park vehicles	$ 3,739.00
11	First Presbyterian Church of P.O. Box 297 Jacksonville, OR 97530	N/A	Active	Support the installation of gutters and an underground drainage system for the Historic Presbyterian Church of Jacksonville.	$ 4,707 00
12	HOPE Equestrian Center P.O. Box 396 Eagle Point, OR 97524	N/A	Active	Support the adopt a rider fund at HOPE so that individuals with physical, emotional and learning disabilities can receive therapeutic horseback riding sessions.	$ 5,000 00

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of recipient	Purpose of grant or contribution	Amount
13	Jackson County Child Abuse Task Force- Children's Advocacy Center 816 W. 10th Street Medford, OR 97501	N/A	Active	Assist with the completion of a complete redesign of the CAC website	$ 5,000.00
14	Jackson County Health & Human Services 1005 East Main Medford, OR 97504	N/A	Active	Maintain staffing at the Ashland High School Health Center, which provides medical care to teens, many of whom don't have insurance or don't have	$ 5,000.00
15	Jacksonville Fire Dept. P.O. Box 7 Jacksonville, OR 97530	N/A	Active	Purchase a new Holmatro Rescue Tool for fire apparatus	$ 5,000 00
16	Klamath Bird Observatory P O Box 758 Ashland, OR 97520	N/A	Active	Create a multiple visit nature and science education program designed to support and enrich K-8th grade	$ 2,500.00
17	La Clinica Del Valle Family Health Care Center 3617 S Pacific Hwy Medford, OR 97501	N/A	Active	Provide discounts for primary medical care for 100 of their most vulnerable pediatric patients who are not receiving needed health care	$ 5,000 00
18	Marine Toys For Tots Foundation 18251 Quantico Gateway Drive Triangle, VA 22172-1776	N/A	Active	Purchase toys for children in need during the 2009 holiday season.	$ 2,500 00
19	Monett Senior Citizens Center 405 Dairy Street Monett, MO 65708	N/A	Active	Support the replacement of a 20 year old heating and air conditioning system at the Center	$ 3,351.00
20	Monett Youth Center 404 E. Broadway Monett, Mo 65708	N/A	Active	Support the activities and daily functions of the Monett Youth Center - The Den, that serves community youth by providing a safe, positive place to spend time with other youth and caring, concerned adults.	$ 1,000 00
21	NOWIA - Unete Center for Farm Worker Advocacy 607 W Main Street Medford, OR 97501	N/A	Active	Support Razas Unidas (Races United), an after school program for Latino youth, in providing mentoring, homework assistance, SAT test preparation and assistance with completion of scholarship forms	$ 3,550 00
22	Ozarks Regional YMCA 417 S Jefferson Ave. Springfield, MO 65806	N/A	Active	Purchase a commercial quality domed hockey table to improve the youth game room area at the Monett YMCA.	$ 2,673.00
23	Providence Community Health Foundation 940 Royal Ave, Suite 410 Medford, OR 97504	N/A	Active	Improve the odds for women facing breast cancer in southern Oregon by assisting with the purchase of a Dilon Camera, the first in the Rogue Valley region and only the second in the state of Oregon.	$ 2,500 00
24	Purdy R-II School District - Purdy High School 201 S. Gabby Gibbons Drive Purdy, MO 65734	N/A	Active	Purchase a Science Smart Board for Purdy High School.	$ 3,899 00

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of recipient	Purpose of grant or contribution	Amount
25	Roots and Wings Child Development 1801 E. Jackson St. Medford, OR 97504	N/A	Active	Provide tuition assistance for 11 at-risk children from low income families for the 2009-2010 school year.	$ 3,700.00
26	ScienceWorks Hands-On Museum 1500 E. Main St. Ashland, OR 97520	N/A	Active	Support hands-on science experiences for approximately 500 Head Start students and their families in Jackson	$ 3,500 00
27	Society of St. Vincent De Paul- St. Anne Conference 132 SE H Street Grants Pass, OR 97526	N/A	Active	Assist needy families with their rent and utility bills.	$ 5,000.00
28	Barry County - SW Missouri Drug Task Force P O. Box 184 Cassville, MO 65625	N/A	Active	Purchase bullet proof vests for the agents currently employed	$ 5,000.00
29	Sparrow Clubs USA 2600 Siskiyou Blvd. Medford, OR 97504	N/A	Active	Sponsor Sparrow projects at local school(s) in Jackson and/or Josephine County.	$ 5,000 00
30	The Salvation Army P O. Box 938 Huntington, WV 25712	N/A	Active	Provide food, utility, and rental assistance to individuals and families	$ 5,000 00
31	Tri-State Fire School Association 328 S 6th Ave Huntington, WV 25701	N/A	Active	Purchase modern audio visual equipment for training first responders.	$ 5,997.00
32	Welcome Home Oregon (WHO) 106 NW F Street #65 Grants Pass, OR 97526	N/A	Active	Provide rental assistance for individuals who are working towards reunification with their children upon	$ 2,500.00
33	Wilderness Trails, Inc P.O Box 4655 Medford, OR 97501	N/A	Active	Provide 27 young people with the opportunity to attend a weekend Follow-Up Retreats.	$ 4,000 00
34	YMCA of Medford 522 W 6th Street Medford, OR 97501	N/A	Active	Support the YMCA Financial Assistance Program	$ 5,000 00
35	Youth for Christ, Rogue Valley Area 691 Murphy Rd, Ste. 112 Medford, OR 97504	N/A	Active	Assist with start up expenses for the Phoenix Campus Life Youth Center	$ 5,000 00
36	4-H Clubs- Cabell County P O Box 219 Ona, WV 25545	N/A	Active	Youth fitness and nutrition education at 4-H Camp	$ 2,750.00
37	Applegate Valley Rural Fire Protection District No. 9 1095 Upper Applegate Road Jacksonville, OR 97530	N/A	Active	Purchase 10 cylinders for Self Contained Breathing Apparatus	$ 9,000 00
38	Aurora Farmers Fire Protection Association 1175 E Church St. Aurora, MO 65605	N/A	Active	Purchase rescue equipment	$ 6,495.00
39	Berean Christian Academy P.O. Box 506 Monett, Mo 65708	N/A	Active	Tuition assistance scholarships	$12,500 00

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of recipient	Purpose of grant or contribution	Amount
40	Calvary Church of Jacksonville P O. Box 117 Jacksonville, OR 97530	N/A	Active	Purchase a cargo trailer	$ 5,000.00
41	CASA of Jackson County, Inc. 613 Market Street Medford, OR 97504	N/A	Active	Child Advocate Sustainability	$ 9,000.00
42	Central Neighborhood Church 4777 S. Pacific Hwy. Phoenix, OR 97535	N/A	Active	Support Royal Family Kids' Camp	$ 5,000.00
43	First Christian Church- ROC 564 SW Foundry St. Grants Pass, OR 97526	N/A	Active	Saturday Food Pantry Distribution	$ 6,000 00
44	Grant Pass High School Band Boosters 830 NE 9th Street Grants Pass, OR 97526	N/A	Active	Support for the Macy's 2010 Thanksgiving Day Parade	$ 8,750 00
45	Habitat for Humanity, Monett/Purdy MO areas P O Box 123 Monett, Mo 65708	N/A	Active	Upgrade office equipment, Board policies and educational supplies	$ 2,153.00
46	Hearts With A Mission 521 Edwards Medford, OR 97504	N/A	Active	Fund operational expenses	$10,000.00
47	Help Now! Advocacy Center 33 N. Central Ave., Suite 211 Medford, OR 97501	N/A	Active	Hispanic Advocacy Program	$ 4,500 00
48	Huntington Area Food Bank 1327 7th Ave. Huntington, WV 25701	N/A	Active	Backpack for Buddies project	$ 6,500 00
49	Huntington City Mission P.O. Box 3 Huntington, WV 25701	N/A	Active	Emergency power generators project	$10,000.00
50	Jackson County Children's Dental Clinic 229 Stewart Ave. Medford, OR 97501	N/A	Active	Purchase an air compressor and required parts	$ 5,717 00
51	Jackson County Fire District 5 5811 S. Pacific Hwy Phoenix, OR 97535	N/A	Active	Thermal Imaging Camera	$ 8,495 00
52	Jacksonville Engine Company #1 180 N. 3rd Jacksonville, OR 97530	N/A	Active	Support the communications project	$ 1,200.00
53	Medford School District 549c- South Medford High School 500 Monroe ST. Medford, OR 97501	N/A	Active	South Medford High School Panther Future Center	$ 5,000 00
54	Medford School District 549C-Project Dove 500 Monroe ST. Medford, OR 97501	N/A	Active	Fund operational expenses	$ 2,500.00

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of recipient	Purpose of grant or contribution	Amount
55	Milton Volunteer Fire Dept 341 E. Main Street Milton, MO 25541	N/A	Active	Purchase a new defibrillator	$10,000 00
56	Monett Senior Citizens Center 405 Dairy Street Monett, Mo 65708	N/A	Active	Replace heating and air conditioning system at the Center	$ 3,351 00
57	Mother Teresa Home dba Magdalene Home 12 Black Oak Drive Medford, OR 97504	N/A	Active	House mother position at the Magdalene Home	$10,000.00
58	New Song Church 520 N. Holly St. Medford, OR 97501	N/A	Active	Christmas/Birthday boxes for low income families	$ 3,000 00
59	Providence Community Health Foundation 940 Royal Ave, Suite 410 Medford, OR 97504	N/A	Active	Support the Providence Festival of Trees	$ 1,000.00
60	Purdy Fire Protection District P O Box 51 Purdy, MO 65734	N/A	Active	Purchase live fire training equipment	$10,000 00
61	Rogue Valley Foundation 101 E. 8th Street Medford, OR 97501	N/A	Active	Chamber Latino Network Scholarship Program	$ 3,000 00
62	Society of St. Vincent de Paul P.O. Box 1663 Medford, OR 97501	N/A	Active	Emergency rent and utility assistance	$10,000 00
63	Southern Oregon Education Services District (SOESD) 101 N Grape Street Medford, OR 97501	N/A	Active	Bilingual case manger in the Hispanic Academic Outreach (HAO)	$ 2,500 00
64	Southern Oregon Humane Society 2910 Table Rock Road Medford, OR 97501	N/A	Active	Humane Education programs	$ 5,000.00
65	The Salvation Army, A California Corp. 304 Beatty Street Medford, OR 97501	N/A	Active	Family Circle parenting program at Hope House transitional shelter	$ 5,000 00
66	United Way of Jackson County 769 Spring Street Medford, OR 97504	N/A	Active	2010 Oregon Non-Profit Leaders Conference	$ 1,500 00
67	United Way of Jackson County 769 Spring Street Medford, OR 97504	N/A	Active	HOPE Chest emergency assistance program	$10,000 00
68	WinterSpring Center Transforming Grief and Loss P O. Box 8169 Medford, OR 97501	N/A	Active	Children's Bereavement Support Program	$ 5,500.00
69	Women's Coalition of Josephine County- Women's Crisis Support Team 560 NE F Street, A #430 Grants Pass, OR 97526	N/A	Active	Support for Family Resource Advocate program	$ 3,720 00

$ 355,368 00

Robert & Frances Chaney Family Foundation
EI # 20-5052365
Year ended 5/31/2010
990PF Attachment

Cover sheet for all accounts.

Description	Purchase/ Donation	Purchase Date	Sale Date	ST/LT	Sale Amount	Cost Basis	Gain/ (Loss)
UBS PACE ALTER STRAT INV-P	Purchase	11/9/2006	4/13/2010	LT	$ 150,000 00	$ 163,868 23	$ (13,868 23)
UBS PACE LARGE CO GRWTH-P	Purchase	11/9/2006	4/13/2010	LT	$ 25,000 00	$ 25,944 81	$ (944 81)
UBS PACE LARGE CO VALUE EQ-P	Purchase	11/9/2006	4/13/2010	LT	$ 25,000 00	$ 36,711 98	$ (11,711 98)
BRISTOL MYERS SQUIBB CO	Purchase	3/2/2009	1/26/2010	ST	$ 7,943 68	$ 5,915 91	$ 2,027 77
CHUBB CORP	Purchase	7/22/2009	1/26/2010	ST	$ 8,753 28	$ 7,235 70	$ 1,517 58
HONEYWELL INTERNATIONAL INC	Purchase	3/2/2009	1/26/2010	ST	$ 17,962 32	$ 11,260 62	$ 6,701 70
HONEYWELL INTERNATIONAL INC	Purchase	3/2/2009	1/26/2010	ST	$ 23,950 86	$ 15,014.16	$ 8,936 70
HUDSON CITY BANCORP INC	Purchase	4/27/2009	1/26/2010	ST	$ 7,139 76	$ 6,962 45	$ 177 31
MONSANTO COMPANY	Purchase	7/6/2009	1/26/2010	ST	$ 5,444 14	$ 5,131 55	$ 312 59
UNION PACIFIC CORP	Purchase	3/18/2009	1/26/2010	ST	$ 8,267 89	$ 5,164 25	$ 3,103 64
AMERICAN EXPRESS CO	Purchase	11/11/2008	1/26/2010	LT	$ 11,552 07	$ 6,798 00	$ 4,754 07
ARCHER DANIELS MIDLAND CO	Purchase	12/18/2006	1/26/2010	LT	$ 8,813 76	$ 9,653 34	$ (839 58)
AT&T INC	Purchase	12/7/2006	1/26/2010	LT	$ 7,281 68	$ 10,140 72	$ (2,859 04)
BECTON DICKINSON & CO	Purchase	12/23/2008	1/26/2010	LT	$ 6,733 69	$ 6,006 64	$ 727 05
CATERPILLAR INC	Purchase	12/7/2006	1/26/2010	LT	$ 9,214 52	$ 10,458 69	$ (1,244 17)
CHEVRON CORPORATION	Purchase	12/7/2006	1/26/2010	LT	$ 10,365 07	$ 10,354 12	$ 10 95
CONCOPHILIPS	Purchase	12/7/2006	1/26/2010	LT	$ 7,051 19	$ 9,697 52	$ (2,646 33)
CONSOLIDATED EDISON INC HOLDINGS CO	Purchase	4/4/2008	1/26/2010	LT	$ 10,883 03	$ 10,459 79	$ 423 24
DUPONTE I DE NEMOURS & CO	Purchase	12/31/2008	1/26/2010	LT	$ 9,137 84	$ 7,028 00	$ 2,109 84
EMERSON ELECTRIC CO	Purchase	12/7/2006	1/26/2010	LT	$ 3,999 07	$ 4,109 99	$ (110 92)
EMERSON ELECTRIC CO	Purchase	12/7/2006	1/26/2010	LT	$ 4,214 46	$ 4,326 30	$ (111 84)
EXXON MOBIL CORPORATION	Purchase	12/7/2006	1/26/2010	LT	$ 8,557 45	$ 9,865 70	$ (1,308 25)
HALLIBURTON CO	Purchase	10/17/2008	1/26/2010	LT	$ 10,603 58	$ 6,471 72	$ 4,131 86
HOME DEPOT	Purchase	12/7/2006	1/26/2010	LT	$ 7,138 59	$ 10,217 48	$ (3,078 89)
INTEL CORP	Purchase	12/7/2006	1/26/2010	LT	$ 6,667 86	$ 7,004 85	$ (336 99)
INTL BUSINESS MACHINES CORP	Purchase	3/13/2007	1/26/2010	LT	$ 11,946 86	$ 8,919 69	$ 3,027 17
JOHNSON & JOHNSON	Purchase	12/7/2006	1/26/2010	LT	$ 1,557 00	$ 1,651 45	$ (94 45)
JOHNSON & JOHNSON	Purchase	12/7/2006	1/26/2010	LT	$ 6,224 15	$ 6,605 80	$ (381 65)
KIMBERLY CLARK CORP	Purchase	12/7/2006	1/26/2010	LT	$ 7,448 76	$ 8,378 31	$ (929 55)
MCGRAW HILL COMPANIES INC	Purchase	12/7/2006	1/26/2010	LT	$ 6,105 57	$ 12,003 48	$ (5,897 91)
NATIONAL FUEL GAS CO	Purchase	12/7/2006	1/26/2010	LT	$ 12,161 06	$ 9,424 68	$ 2,736 38
NORDSTROM INC	Purchase	10/15/2007	1/26/2010	LT	$ 9,104 42	$ 10,912 56	$ (1,808 14)
NUCOR CORP	Purchase	10/6/2008	1/26/2010	LT	$ 7,605 97	$ 5,645 71	$ 1,960 26
PEPSICO INC	Purchase	12/7/2006	1/26/2010	LT	$ 8,962 94	$ 9,524 70	$ (561 76)
SYSCO CORP	Purchase	12/7/2006	1/26/2010	LT	$ 7,244 31	$ 9,650 77	$ (2,406 46)
TEXAS INSTRUMENTS	Purchase	9/17/2008	1/26/2010	LT	$ 2,340 42	$ 2,243 91	$ 96 51
TEXAS INSTRUMENTS	Purchase	9/17/2008	1/26/2010	LT	$ 7,505 74	$ 7,180 50	$ 325.24
UNITED TECHNOLOGIES	Purchase	12/7/2006	1/26/2010	LT	$ 10,541 65	$ 10,057 64	$ 484 01
VERIZON COMMUNICATIONS	Purchase	8/8/2007	1/26/2010	LT	$ 8,004 07	$ 11,486 89	$ (3,482 82)
AMERICAN EXPRESS	Purchase	11/11/2008	2/17/2010	LT	$ 3,904 95	$ 2,266.00	$ 1,638 95
ARCHER DANIELS MIDLAND CO	Purchase	12/18/2006	2/17/2010	LT	$ 2,984 23	$ 3,217 78	$ (233 55)
AT & T	Purchase	12/7/2006	2/17/2010	LT	$ 2,536 97	$ 3,496 80	$ (959 83)
CONSOLIDTED EDISON INC HOLDING CO	Purchase	4/4/2008	2/17/2010	LT	$ 4,282 14	$ 4,183 92	$ 98 22
HALLIBURTON CO	Purchase	10/17/2008	2/17/2010	LT	$ 3,104 23	$ 1,875 86	$ 1,228 37
HOME DEPOT INC	Purchase	12/7/2006	2/17/2010	LT	$ 2,997 14	$ 3,929 80	$ (932 66)
MCGRAW-HILL COMPANIES INC	Purchase	12/7/2006	2/12/2010	LT	$ 32,908 96	$ 64,685 42	$ (31,776 46)
SYSCO CORP	Purchase	12/7/2006	2/17/2010	LT	$ 2,845 16	$ 3,641 80	$ (796 64)

Robert & Frances Chaney Family Foundation
EI # 20-5052365
Year ended 5/31/2010
990PF Attachment

Cover sheet for all accounts.

Description	Purchase/ Donation	Purchase Date	Sale Date	ST/LT	Sale Amount	Cost Basis	Gain/ (Loss)
UBS GLOBAL ALLOCATION FUND CLASS A	Purchase	10/2/2006	7/22/2009	LT	$ 250,000 00	$ 420,277 95	$ (170,277 95)
UBS PACE GOVT SEC FIXED INCOME INVESTMENT FUND CLASS P	Purchase	11/9/2006	7/28/2009	LT	$ 5,000 00	$ 4,868 51	$ 131 49
OPPENHEIMER INTL BOND FD CL A	Purchase	33/2006	8/24/2009	LT	$ 15,000 00	$ 14,384 01	$ 615 99
UBS PACE GLOBAL FIXED INCOME INVESTMENT FUND CLASS P	Purchase	11/9/2006	8/26/2009	LT	$ 10,000 00	$ 9,598 29	$ 401 71
UBS PACE GOVT SEC FIXED INCOME INVESTMENT FUND CLASS P	Purchase	11/9/2006	8/26/2009	LT	$ 5,000 00	$ 4,814 26	$ 185 74
UBS PACE HIGH YIELD INVESTMENTS CLASS P	Purchase	11/9/2006	8/26/2009	LT	$ 10,000 00	$ 11,117 26	$ (1,117 26)
UBS GLOBAL ALLOCATION FUND CLASS A	Purchase	10/2/2006	10/20/2009	LT	$ 500,000 00	$ 725,310 78	$ (225,310 78)
UBS GLOBAL ALLOCATION FUND CLASS A	Purchase	10/2/2006	11/9/2009	LT	$ 200,000 00	$ 291,598 63	$ (91,598 63)
INTL BUSINESS MACH	Purchase	3/13/2007	7/24/2009	LT	$ 4,108 58	$ 3,286.20	$ 822 38
JP MORGAN CHASE & Co	Purchase	12/7/2006	7/22/2009	LT	$ 53,480 46	$ 68,398 08	$ (14,917 62)
VULCAN MATERIALS CO NEW (holding company)	Purchase	3/20/2008	7/6/2009	LT	$ 12,993 15	$ 19,195 50	$ (6,202 35)
VULCAN MATERIALS CO NEW (holding company)	Purchase	5/1/2008	7/6/2009	LT	$ 15,158 68	$ 23,682 75	$ (8,524 07)
VULCAN MATERIALS CO NEW (holding company)	Purchase	5/8/2008	7/6/2009	LT	$ 13,859 36	$ 20,864 80	$ (7,005 44)
ALLIANZ FIXED INCOME SHARES SERIES C	Purchase	2/11/2009	12/3/2009	ST	$ 57,822 75	$ 49,242 60	$ 8,580 15
ALLIANZ FIXED INCOME SHARES SERIES C	Purchase	4/13/2009	12/3/2009	ST	$ 976 50	$ 784 70	$ 191 80
ALLIANZ FIXED INCOME SHARES SERIES C	Purchase	8/3/2009	12/3/2009	ST	$ 53,847 00	$ 49,099 20	$ 4,747 80
ALLIANZ FIXED INCOME SHARES SERIES C	Purchase	11/16/2009	12/3/2009	ST	$ 90,605 25	$ 90,735 15	$ (129 90)
ALLIANZ FIXED INCOME SHARES SERIES M	Purchase	2/11/2009	12/3/2009	ST	$ 56,956 20	$ 48,934 20	$ 8,022 00
ALLIANZ FIXED INCOME SHARES SERIES M	Purchase	8/3/2009	12/3/2009	ST	$ 51,837 10	$ 48,655 95	$ 3,181 15
ALLIANZ FIXED INCOME SHARES. SERIES M	Purchase	11/16/2009	12/3/2009	ST	$ 94,280 90	$ 94,375 75	$ (94 85)
TOTAL					$ 2,064,918 42	$ 2,606,010 56	**$ (541,092.14)**