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# Return of Private Foundation

## or Section 4947(a)(1) Nonexempt Charitable Trust

### Treated as a Private Foundation

2010

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2010, or tax year beginning JUN 1, 2010, and ending MAY 31, 2011

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

Name of foundation <b>WEST FAMILY FOUNDATION</b>		A Employer identification number <b>20-4720365</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>680 G STREET; SUITE B</b>	Room/suite	B Telephone number <b>(541) 899-9976</b>
City or town, state, and ZIP code <b>JACKSONVILLE, OR 97530</b>		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>8,687,624.</b> (Part I, column (d) must be on cash basis)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		303,203.	303,203.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<364,075.>			
b Gross sales price for all assets on line 6a		3,638,030.			
7 Capital gain net income (from Part IV, line 2)					
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		<60,872.>	303,203.		
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		1,349.	0.		1,349.
16a Legal fees STMT 2		2,665.	0.		2,665.
b Accounting fees STMT 3		5,756.	2,688.		3,068.
c Other professional fees STMT 4		85,503.	85,503.		0.
17 Interest					
18 Taxes STMT 5		9,550.	0.		9,550.
19 Depreciation and depletion					
20 Occupancy		4,862.	0.		4,862.
21 Travel, conferences, and meetings		331.	0.		331.
22 Printing and publications					
23 Other expenses STMT 6		15,664.	0.		15,664.
24 Total operating and administrative expenses. Add lines 13 through 23		156,722.	88,191.		68,531.
25 Contributions, gifts, grants paid		308,776.			308,776.
26 Total expenses and disbursements. Add lines 24 and 25		465,498.	88,191.		377,307.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<526,370.>			
b Net investment income (if negative, enter -0-)			215,012.		
c Adjusted net income (if negative, enter -0-)				N/A	

**Part II Balance Sheets**

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	91,845.	208,394.	208,394.
	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 ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	10,211.		
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	9,489,151.	8,620,500.	8,259,094.
	c Investments - corporate bonds			
<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 195,000.			
	Less: accumulated depreciation ▶	0.	195,000.	195,000.
	15 Other assets (describe ▶ STATEMENT 8 )	0.	25,136.	25,136.
	16 Total assets (to be completed by all filers)	9,591,207.	9,049,030.	8,687,624.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 9 )	17,450.	1,643.	
	23 Total liabilities (add lines 17 through 22)	17,450.	1,643.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 ▶ <input checked="" type="checkbox"/>			
	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	9,573,757.	9,047,387.	
30 Total net assets or fund balances	9,573,757.	9,047,387.		
31 Total liabilities and net assets/fund balances	9,591,207.	9,049,030.		

**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	9,573,757.
2 Enter amount from Part I, line 27a	2	<526,370.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	9,047,387.
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	9,047,387.

**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.)
<b>1a SEE ATTACHED SCHEDULE</b>		<b>P</b>		
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)
<b>a 3,638,030.</b>		<b>4,002,105.</b>	<b>&lt;364,075.&gt;</b>
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))
<b>a</b>			<b>&lt;364,075.&gt;</b>
b			
c			
d			
e			

<b>2 Capital gain net income or (net capital loss)</b>	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	<b>2</b>	<b>&lt;364,075.&gt;</b>
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):</b> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		<b>3</b>	<b>N/A</b>

**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))
2009	396,525.	7,776,288.	.050992
2008	432,945.	7,439,816.	.058193
2007	570,546.	10,250,202.	.055662
2006	245,590.	10,002,578.	.024553
2005			

<b>2 Total of line 1, column (d)</b>	<b>2</b>	<b>.189400</b>
<b>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</b>	<b>3</b>	<b>.047350</b>
<b>4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5</b>	<b>4</b>	<b>8,115,167.</b>
<b>5 Multiply line 4 by line 3</b>	<b>5</b>	<b>384,253.</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>	<b>6</b>	<b>2,150.</b>
<b>7 Add lines 5 and 6</b>	<b>7</b>	<b>386,403.</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b> 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.	<b>8</b>	<b>377,307.</b>

**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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	4,300.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	4,300.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	4,300.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	3,552.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	
a 2010 estimated tax payments and 2009 overpayment credited to 2010		6d	
b Exempt foreign organizations - tax withheld at source		7	3,552.
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	748.
7 Total credits and payments. Add lines 6a through 6d		10	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		11	
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>			
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>			
11 Enter the amount of line 10 to be: <b>Credited to 2011 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>			

**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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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		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	X	
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> <b>OR</b> 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	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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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

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? Website address ► <u>WWW.FAMILYFOUNDATIONWEST.ORG</u>	13	X	
14	The books are in care of ► <u>CARRIE HANSON, EXECUTIVE DIRECTOR</u> Telephone no. ► <u>(541) 899-9976</u> Located at ► <u>680 G STREET, SUITE B, JACKSONVILLE, OR</u> ZIP+4 ► <u>97530</u>			
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			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

**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.

	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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 2010?	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is <b>not</b> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2010 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 2010.)	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 2010?	4b	X

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**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

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?

If "Yes," to 6b, file Form 8870.

6b

X

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
STEVEN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	PRESIDENT 10.00	0.	0.	0.
CAROLYN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	VICE-PRESIDENT 10.00	0.	0.	0.
JASON ANDERSON PO BOX 1667 MEDFORD, OR 97501	SECRETARY/TREASURER 2.00	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

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**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.

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	7,949,643.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	289,105.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	8,238,748.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	8,238,748.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	123,581.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	8,115,167.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	405,758.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	405,758.
<b>2a</b>	Tax on investment income for 2010 from Part VI, line 5	<b>2a</b>	4,300.
<b>b</b>	Income tax for 2010. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	4,300.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	401,458.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	401,458.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	401,458.

**Part XII** Qualifying Distributions (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	377,307.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	377,307.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	377,307.

**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.

Form 990-PF (2010)

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				401,458.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			69,059.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ 377,307.				
a Applied to 2009, but not more than line 2a			69,059.	
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 2010 distributable amount				308,248.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (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 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				93,210.
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 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				



<b>Part XV</b>	<b>Supplementary Information</b> (continued)
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## 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a Paid during the year SEE ATTACHED STATEMENT	NONE			308,776.
<b>Total</b>				<b>▶ 3a 308,776.</b>
b Approved for future payment  NONE				
<b>Total</b>				<b>▶ 3b 0.</b>



**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.		

[illegible]

**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		

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.

**Sign  
Here**

Signature of officer or trustee

Date \_\_\_\_\_

Title

Print/Type preparer's name

Preparer's signature, \_\_\_\_\_

Date \_\_\_\_\_

Check	<input type="checkbox"/>	if	PTIN
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self- employed

**Paid  
Preparer  
Use Only**

David P. Hyatt

22.1.14

9(3)11

Firm's name ▶ DAVID P HYATT CPA, PC  
3551 E BARNETT ROAD; SUITE #105

Firm's EIN **26-1932063**

Firm's address ► **MEDFORD, OR 97504**

Phone no. (541) 773-9407

Form **990-PF** (2010)

Cover sheet for all accounts.

Description	Purchase/ Donation	Purchase Date	Sale Date	ST/LT	Sale Amount	Cost Basis	Gain/ (Loss)
DWS RREEF REAL ESTATE FD II	Purchase	2/9/2007	6/23/2010	LT	\$ 5,735 00	\$ 105,595 60	\$ (99,860 60)
UBS DYNAMIC ALPHA FUND Y	Purchase	3/1/2006	7/28/2010	LT	\$ 0 36	\$ 0 66	\$ (0 30)
UBS DYNAMIC ALPHA FUND Y	Purchase	12/19/2007	7/28/2010	LT	\$ 201,394 29	\$ 339,086 92	\$ (137,692 63)
UBS DYNAMIC ALPHA FUND Y	Purchase	12/18/2008	7/28/2010	LT	\$ 1,120,241 28	\$ 930,154 70	\$ 190,086 58
UBS GLOBAL ALLOCATION A	Purchase	12/19/2007	7/28/2010	LT	\$ 34,595 35	\$ 51,161 02	\$ (16,565 67)
UBS GLOBAL ALLOCATION A	Purchase	12/19/2007	7/28/2010	LT	\$ 43,551 03	\$ 64,405 03	\$ (20,854 00)
UBS GLOBAL ALLOCATION A	Purchase	12/18/2008	7/28/2010	LT	\$ 102,949 82	\$ 80,370 89	\$ 22,578 93
UBS GLOBAL ALLOCATION A	Purchase	12/18/2008	7/28/2010	LT	\$ 167,846 56	\$ 131,034 49	\$ 36,812 07
UBS GLOBAL ALLOCATION A	Purchase	12/18/2008	7/28/2010	LT	\$ 245,907 01	\$ 191,974 73	\$ 53,932 28
FRONTIER COMMUNICATIONS CORP	Purchase	8/8/2007	8/12/2010	LT	\$ 2,235 22	\$ 3,083 44	\$ (848 22)
FRONTIER COMMUNICATIONS CORP	Purchase	10/10/2008	8/12/2010	LT	\$ 558 80	\$ 463 18	\$ 95 62
VIRTUS REAL ESTATE SEC C	Purchase	6/22/2010	8/30/2010	ST	\$ 668 38	\$ 501 09	\$ 167 29
VIRTUS REAL ESTATE SEC C	Purchase	2/15/2007	8/30/2010	LT	\$ 61,615 72	\$ 100,005 25	\$ (38,389 53)
VIRTUS REAL ESTATE SEC C	Purchase	3/22/2007	8/30/2010	LT	\$ 86 39	\$ 131 73	\$ (45 34)
VIRTUS REAL ESTATE SEC C	Purchase	12/20/2007	8/30/2010	LT	\$ 22 46	\$ 25 91	\$ (3 45)
VIRTUS REAL ESTATE SEC C	Purchase	12/20/2007	8/30/2010	LT	\$ 2,185 36	\$ 2,521 44	\$ (336 08)
VIRTUS REAL ESTATE SEC C	Purchase	3/20/2008	8/30/2010	LT	\$ 241 96	\$ 286 78	\$ (44 82)
VIRTUS REAL ESTATE SEC C	Purchase	6/20/2008	8/30/2010	LT	\$ 73 15	\$ 85 58	\$ (12 43)
VIRTUS REAL ESTATE SEC C	Purchase	9/22/2008	8/30/2010	LT	\$ 93 33	\$ 106 44	\$ (13 11)
VIRTUS REAL ESTATE SEC C	Purchase	12/22/2008	8/30/2010	LT	\$ 287 05	\$ 195 01	\$ 92 04
VIRTUS REAL ESTATE SEC C	Purchase	3/23/2009	8/30/2010	LT	\$ 831 51	\$ 438 77	\$ 392 74
VIRTUS REAL ESTATE SEC C	Purchase	6/22/2009	8/30/2010	LT	\$ 303 36	\$ 175 13	\$ 128 23
UBS DYNAMIC ALPHA FUND-Y	Purchase	3/1/2006	8/23/2010	LT	\$ 4,000 00	\$ 7,139 16	\$ (3,139 16)
RUSSELL STRATEGIC BOND I	Purchase	8/13/2010	10/6/2010	ST	\$ 15,929 13	\$ 15,685 39	\$ 243 74
RUSSELL US CORE EQUITY I	Purchase	8/13/2010	10/6/2010	ST	\$ 45,217 29	\$ 41,781 48	\$ 3,435 81
RUSSELL US QUANTITATIVE EQ 1	Purchase	8/13/2010	10/6/2010	ST	\$ 62,348 94	\$ 58,277 56	\$ 4,071 38
UBS DYNAMIC ALPHA FUND-Y	Purchase	12/18/2009	11/5/2010	ST	\$ 66,780 00	\$ 64,785 00	\$ 1,995 00
UBS GLOBAL ALLOCATION A	Purchase	12/18/2009	11/5/2010	ST	\$ 109,095 00	\$ 96,915 00	\$ 12,180 00
FANNIE MAE POOL	Purchase	2/10/2009	11/29/2010	LT	\$ 10,027 46	\$ 9,722 35	\$ 305 11
FANNIE MAE POOL	Purchase	6/10/2009	11/29/2010	LT	\$ 2,638 81	\$ 2,501 24	\$ 137 57
FANNIE MAE POOL	Purchase	7/29/2009	11/29/2010	LT	\$ 12,666 26	\$ 12,256 85	\$ 409 41
FANNIE MAE POOL	Purchase	11/13/2009	11/29/2010	LT	\$ 26,915 81	\$ 26,668 32	\$ 247 49
FEDERAL NATIONAL MTG ASSN POOL	Purchase	11/13/2009	11/29/2010	LT	\$ 31,204 02	\$ 30,912 39	\$ 291 63
FHLMC PC GOLD COMB POOL	Purchase	2/10/2009	11/29/2010	LT	\$ 10,129 76	\$ 9,769 26	\$ 360 50
FHLMC PC GOLD COMB POOL	Purchase	6/10/2009	11/29/2010	LT	\$ 2,302 22	\$ 2,205 80	\$ 96 42
RUSSELL COMMODITY STRAT-S	Purchase	8/13/2010	1/6/2011	ST	\$ 7,147 40	\$ 6,798 43	\$ 348 97
RUSSELL REAL ESTATE SECS S	Purchase	8/13/2010	1/6/2011	ST	\$ 602 93	\$ 547 61	\$ 55 32
RUSSELL STRATEGIC BOND I	Purchase	8/13/2010	1/6/2011	ST	\$ 17,941 98	\$ 18,447 86	\$ (505 88)
RUSSELL US CORE EQUITY I	Purchase	8/13/2010	1/6/2011	ST	\$ 14,175 66	\$ 11,739 69	\$ 2,435 97
RUSSELL US QUANTITATIVE EQ 1	Purchase	8/13/2010	1/6/2011	ST	\$ 11,343 24	\$ 9,626 69	\$ 1,716 55
RUSSELL US SMALL & M/C S	Purchase	8/13/2010	1/6/2011	ST	\$ 13,958 46	\$ 10,783 33	\$ 3,175 13
HALLIBURTON CO	Purchase	10/17/2008	1/19/2011	LT	\$ 28,367 53	\$ 13,506 20	\$ 14,861 33
HALLIBURTON CO	Purchase	10/20/2008	1/19/2011	LT	\$ 7,091 88	\$ 3,549 60	\$ 3,542 28
HALLIBURTON CO	Purchase	10/20/2008	1/19/2011	LT	\$ 28,367 53	\$ 14,148 00	\$ 14,219 53
HALLIBURTON CO	Purchase	11/25/2008	1/19/2011	LT	\$ 13,395 78	\$ 5,421 74	\$ 7,974 04
US TREAS INFL INDEX NOTE	Purchase	2/10/2009	2/3/2011	LT	\$ 16,846 50	\$ 16,506 22	\$ 340 28
US TREAS INFL INDEX NOTE	Purchase	7/29/2009	2/3/2011	LT	\$ 15,550 61	\$ 15,193 72	\$ 356 89
US TREAS INFL INDEX NOTE	Purchase	9/10/2009	2/3/2011	LT	\$ 1,295 88	\$ 1,274 77	\$ 21 11
US TREAS INFL INDEX NOTE	Purchase	11/13/2009	2/3/2011	LT	\$ 32,397 11	\$ 32,403 16	\$ (6 05)
US TREASURY INFL INDEX N/B	Purchase	3/25/2009	2/3/2011	LT	\$ 16,698 62	\$ 16,750 73	\$ (52 11)
US TREASURY INFL INDEX N/B	Purchase	7/29/2009	2/3/2011	LT	\$ 16,698 62	\$ 16,774 32	\$ (75 70)
US TREASURY INFL INDEX N/B	Purchase	9/17/2009	2/3/2011	LT	\$ 1,113 24	\$ 1,122 11	\$ (8 87)
US TREASURY INFL INDEX N/B	Purchase	11/13/2009	2/3/2011	LT	\$ 32,283 99	\$ 32,708 93	\$ (424 94)
US TREASURY N/B	Purchase	9/9/2009	2/3/2011	LT	\$ 5,460 16	\$ 5,364 28	\$ 95 88
US TREASURY N/B	Purchase	9/16/2009	2/3/2011	LT	\$ 10,920 31	\$ 10,707 03	\$ 213 28
US TREASURY N/B	Purchase	9/28/2009	2/3/2011	LT	\$ 2,184 06	\$ 2,151 88	\$ 32 18
US TREASURY N/B	Purchase	10/29/2009	2/3/2011	LT	\$ 3,276 09	\$ 3,220 31	\$ 55 78
US TREASURY N/B	Purchase	11/13/2009	2/3/2011	LT	\$ 19,656 56	\$ 19,456 88	\$ 199 68
UBS DYNAMIC ALPHA FUND-Y	Purchase	3/1/2006	2/3/2011	LT	\$ 275,000 00	\$ 478,430 60	\$ (203,430 60)
FANNIE MAE POOL	Purchase	11/13/2009	2/8/2011	LT	\$ 68,177 60	\$ 70,165 87	\$ (1,988 27)
FEDERAL NATIONAL MTG ASSN POOL	Purchase	7/29/2009	2/8/2011	LT	\$ 11,832 24	\$ 12,067 52	\$ (235 28)
FN 889579 NATL MTG ASSOC	Purchase	2/10/2009	2/8/2011	LT	\$ 32,993 96	\$ 32,610 42	\$ 383 54
FN 889579 NATL MTG ASSOC	Purchase	6/10/2009	2/8/2011	LT	\$ 4,653 00	\$ 4,629 15	\$ 23 85
FN 990569 NATL MTG ASSOC	Purchase	7/29/2009	2/8/2011	LT	\$ 46,613 27	\$ 46,736 06	\$ (122 79)
HUDSON CITY BANCORP INC	Purchase	1/19/2011	3/2/2011	ST	\$ 11,358 74	\$ 13,930 23	\$ (2,571 49)
HUDSON CITY BANCORP INC	Purchase	4/27/2009	3/2/2011	LT	\$ 24,012 78	\$ 30,508 19	\$ (6,495 41)
HUDSON CITY BANCORP INC	Purchase	7/22/2009	3/2/2011	LT	\$ 7,074 30	\$ 9,535 10	\$ (2,460 80)
UBS DYNAMIC ALPHA FUND-Y	Purchase	3/1/2006	3/7/2011	LT	\$ 263,625 90	\$ 472,811 98	\$ (209,186 08)
UBS DYNAMIC ALPHA FUND-Y	Purchase	12/20/2010	3/7/2011	ST	\$ 25,424 10	\$ 25,796 16	\$ (372 06)
CATERPILLAR INC	Purchase	6/5/2007	3/25/2011	LT	\$ 8,782 45	\$ 6,256 80	\$ 2,525 65
TRANSAMERICA MUTI-MNGR INTL A	Purchase	2/4/2011	5/24/2011	ST	\$ 151,029 41	\$ 150,000 00	\$ 1,029 41
<b>TOTAL</b>					<b>\$ 3,638,029.98</b>	<b>\$ 4,002,105.16</b>	<b>\$ (364,075.18)</b>

**FIRST AMENDMENT TO  
THE BYLAWS OF  
THE WEST FAMILY FOUNDATION**

THIS FIRST AMENDMENT to the Bylaws of the WEST FAMILY FOUNDATION ("Foundation"), adopted on April 20, 2006, is made by and between the current trustees of the Foundation pursuant to the trustee's powers to amend said Bylaws as set forth in Article 7 of the original Bylaws.

RECITALS:

A. On April 20, 2006, Steven F. West, Carolyn S. West and Jason M. Anderson, as initial trustees of the Foundation, adopted the Bylaws of the Foundation dated April 20, 2006.

B. Steven F. West, Carolyn S. West and Jason M. Anderson are the current trustees and now desire to enter into a First Amendment of the Bylaws of the Foundation dated April 20, 2006.

NOW, THEREFORE, the Bylaws of the Foundation dated April 20, 2006, are hereby amended as follows:

1. Article II, Section 4 is hereby amended to read as follows:

"Section 4. Election of Trustees. Trustees shall be nominated and elected by the Board for terms of three (3) years, and may be re-elected as determined by the Board."

2. Article II, Section 8 is hereby amended to read as follows:

"Section 8. Annual Meeting. The annual meeting shall be held during the month of January each year or as soon thereafter as is practicable."



3. Article IV, Section 7 is hereby amended to read as follows:

"Section 7. Grants Committee. The Board of Trustees may establish a Grants Committee which, if established, may have up to eight (8) members as determined by the Board, to advise the Board with respect to possible grants, grant recipients, and other matters within the Foundation's areas of interest. The Grants Committee shall include at least two (2) members of the Board who shall be selected by the Board, with other members to be elected by the Board. The Grants Committee members shall serve for one (1) year terms, and may be re-elected as determined by the Board. In electing members to the Grants Committee, the Board shall give consideration to knowledge of and experience with educational, human services and other charitable activities of interest to the Board, and to representation of the geographic area served by the Foundation. A chair may be selected by the Board."

4. Article IV, Section 8 is hereby added to the Bylaws and shall read as follows:


"Section 8. Junior Grants Committee. The Board of Trustees may establish a Junior Grants Committee which, if established, may have up to three (3) members as determined by the Board, to advise the Grants Committee and the Board with respect to possible grants, grant recipients, and other matters within the Foundation's areas of interest. The Junior Grants Committee shall be selected by the Board and shall serve for one (1) year terms, and

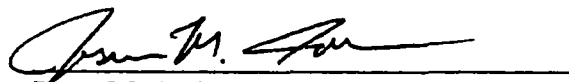
may be re-elected as determined by the Board. In electing members to the Junior Grants Committee, the Board shall work with any of the local high schools to help find students who have knowledge of, experience or interest with the educational, human services and other charitable activities of interest to the Board."

5. Except as herein amended, said Bylaws of the Foundation dated April 20, 2006 are hereby ratified and confirmed in all respects.

IN WITNESS WHEREOF, the Board of Trustees have signed their names this 28<sup>th</sup> day of January, 2010.

  
Steven F. West

  
Carolyn S. West

  
Jason M. Anderson

# STATEMENT S226

## Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 221)

Organization: West Family Foundation

TIN: 20-4720365

Tax Year Ended: 31-May-11

### 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 or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
1	American Red Cross 60 Hawthorne Street Medford, OR 97504	N/A	Active	Building Renovations	\$ 10,000.00
2	Applegate Valley Fire Protection District 1095 Upper Applegate Road Jacksonville, OR 97530	N/A	Active	Thermal Imaging Camera	\$ 8,855.00
3	Asante Foundation 2600 Siskiyou Blvd Medford, OR 97504	N/A	Active	Neonatal Intensive Care Unit Expansion	\$ 10,000.00
4	Ashland Emergency Food Bank P.O. Box 3578 Ashland, OR 97520	N/A	Active	Eggs for distribution at the food bank.	\$ 3,000 00
5	Hope Community Center, Inc 2314 Homedale Rd. Klamath Falls, OR 97601	N/A	Active	Purchase and installation of a professionally engineered safe, ADA compliant playground	\$ 10,000.00
6	Jackson County Child Abuse Task Force 816 W. 10th Street Medford, OR 97501	N/A	Active	Intake and Community Referral Brochures	\$ 2,500.00
7	Jackson County SART 43 Morninglight Drive Ashland, OR 97520	N/A	Active	Sexual Assault Acute Response	\$ 4,000 00
8	Jackson County School District #6 300 Ash St. Central Point, OR 97502	N/A	Active	Music instruments at Crater High School	\$ 5,000 00
9	Jackson County School District #6 300 Ash St. Central Point, OR 97502	N/A	Active	Computers for the media center at Jewett Elementary School	\$ 5,000.00
10	Jackson County School District 549C 500 Monroe St. Medford, OR 97501	N/A	Active	New playground equipment at Lone Pine Elementary	\$ 10,000 00
11	Joe's Place Ministries P.O. Box 1226 Grants Pass, OR 97528	N/A	Active	Food for homeless youth outreach	\$ 1,000 00
12	Junior Achievement of Oregon & SW Washington 7830 SE Foster Rd Portland, OR 97206	N/A	Active	Junior Achievement's economic education outreach in Klamath County during the 2010-11 school year.	\$ 5,000.00
13	Junior League of Jackson County P.O. Box 1504 Medford, OR 97501	N/A	Active	Touch-A-Truck	\$ 1,800 00
14	Kids Unlimited of Oregon 821 N. Riverside Medford, OR 97501	N/A	Active	After school program at Roosevelt Elementary School.	\$ 10,000.00
15	Medford National Little League P.O. Box 1 Medford, OR 97501	N/A	Active	Irrigation equipment for the Field 2 renovation project	\$ 3,200.00
16	Mediation Works, A Community Dispute Resolution Center, Inc. 33 N. Central #219 Medford, OR 7501	N/A	Active	Peer Mediation and ChoicePoint bystander-empowerment programs for rural Jackson County schools	\$ 3,000 00

**Form 990-PF, Part XV, Line 3a**

	<b>Recipient</b>  <b>Name and Address (home or business)</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
17	Mobility Unlimited 1214 Stowe Ave. Medford, OR 97501	N/A	Active	Purchase mobility equipment for physically disabled working Oregonians within Jackson, Josephine, Curry and Klamath counties.	\$ 5,000.00
18	Options for Southern Oregon 1215 SW G Street Grants Pass, OR 97526	N/A	Active	Functional Family Therapy (FFT) program	\$ 5,000 00
19	Oregon Assoc of REALTORS Home Foundation P.O. Box 351 Salem, OR 97308	N/A	Active	Rogue Valley Food & Wine Classic	\$ 5,000.00
20	Prospect Community Club P.O. Box 37 Prospect, OR 97536	N/A	Active	Purchase a commercial grade appliances for the newly remodeled community kitchen	\$ 7,500.00
21	Providence Community Health Foundation 940 Royal Ave., Suite 410 Medford, OR 97504	N/A	Active	Providence Festival of Trees	\$ 4,700.00
22	Rogue Valley Pregnancy Resource Center 2019 Aero Way Suite 103 Medford, OR 97504	N/A	Active	B.A.B.Y. "Be A Better You" program	\$ 3,602 00
23	Ross Ragland Theater 218 N. 7th Street Klamath Falls, OR 97601	N/A	Active	2010-2011 Ross Ragland Theater Outreach and Education Program	\$ 2,500.00
24	S OR Lions Sight & Hearing Center 228 N. Holly Street Medford, OR 97501	N/A	Active	School Vision & Hearing Screening	\$ 4,650.00
25	Sky Lakes Medical Center Foundation 2220 Eldorado Ave. Klamath Falls, OR 97601	N/A	Active	Laptop and projection equipment to present "Stop The Hurt"	\$ 2,600 00
26	St. Mark's Episcopal Church 426 W 6th St. Medford, OR 97501	N/A	Active	Food for distribution at the West Medford Food Pantry	\$ 5,000 00
27	Transformation Wellness Center 3647 Hwy.39 Klamath Falls, OR 97603	N/A	Active	Medication assistance for clients in treatment	\$ 3,969.00
28	Upper Rogue Community Center, Inc 22465 Highway 62 Shady Cove, OR 97539	N/A	Active	Computer carrels for use at the URCC After School Program	\$ 2,500 00
29	Young Marines of Southern Oregon 1990 Riley Road Eagle Point, OR 97524	N/A	Active	Youth Leadership Training	\$ 4,000.00
30	United Way of Jackson County 769 Spring St. Medford, OR 97504	N/A	Active	Support the 2011 Oregon Nonprofit Leaders Conference	\$ 1,500.00
31	Bellview Elementary PTO 1070 Tolman Creek Road Ashland, OR 97520	N/A	Active	Accelerated Reader computer program	\$ 1,250.00
32	Boys & Girls Clubs of the Rogue Valley 203 SE 9th St. Grants Pass, OR 97526	N/A	Active	Scholarships for low income families	\$ 5,000.00
33	Camp Millennium 2876 Diamond Lake Blvd. Roseburg, OR 97535	N/A	Active	2011 Summer Camp Sponsorships	\$ 5,000.00
34	Central Neighborhood Church 4777 S. Pacific Hwy. Phoenix, OR 97535	N/A	Active	2011 Royal Family Kids' Camp	\$ 3,750.00
35	Crater Foundation P.O. Box 5172 Central Point, OR 97502	N/A	Active	Backpacks and school supplies for District #6 families	\$ 2,500.00

**Form 990-PF, Part XV, Line 3a**

	<b>Recipient</b>  <b>Name and Address (home or business)</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
36	Gospel Rescue Mission of Grants Pass 120 SE J St. Grants Pass, OR 97526	N/A	Active	Commercial kitchen supplies at Wagner Hall	\$ 9,000.00
37	Hearts With A Mission 711 Med. Center #334 Medford, OR 97504	N/A	Active	General operating support	\$ 10,000.00
38	HOPE Equestrian Center P O. Box 396 Eagle Point, OR 97524	N/A	Active	Adopt-a-nder fund	\$ 5,000.00
39	Integral Youth Services P.O. Box 1385 Klamath Falls, OR 97601	N/A	Active	School and hygiene supplies for homeless youth	\$ 3,500.00
40	Jackson County School District 6 300 Ash St. Central Point, OR 97502	N/A	Active	Handwriting Without Tears workbooks and classroom materials for all District #6 kindergarten and first grade	\$ 5,000.00
41	Jackson County School District 6 300 Ash St. Central Point, OR 97502	N/A	Active	New musical instruments at Crater High School	\$ 5,000.00
42	Jackson County School District 6 300 Ash St. Central Point, OR 97502	N/A	Active	Three new pieces of playground equipment plus ground cover at Mae Richardson Elementary	\$ 10,000.00
43	Jackson County School District 549C 500 Monroe St. Medford, OR 97501	N/A	Active	New playground equipment at Lone Pine Elementary	\$ 10,000.00
44	Jackson County School District 549C 500 Monroe St. Medford, OR 97501	N/A	Active	Purchase a larger, more efficient electric kiln for the ceramics program at Griffin Creek Elementary	\$ 3,000.00
45	Jackson County School District 549C 500 Monroe St. Medford, OR 97501	N/A	Active	Project Dove for elementary and middle schools within the Medford School District	\$ 5,000.00
46	Jackson County School District 549C 500 Monroe St. Medford, OR 97501	N/A	Active	ASPIRE Coordinator for 2011-12 at the South Medford Panther Future Center	\$ 3,750.00
47	Josephine Community Libraries 200 NW C St. Grants Pass, OR 97526	N/A	Active	Computer and 250 teen books for the libraries in Grants Pass, Williams, Wolf Creek, and Illinois Valley	\$ 3,500.00
48	Junior Achievement of Oregon & SW Washington 7830 SE Foster Rd Portland, OR 97206	N/A	Active	Junior Achievement of Jackson and Josephine Counties	\$ 5,000.00
49	Medford Parks and Recreation Foundation 4497 Brownridge, Suite 101 Medford, OR 97504	N/A	Active	New computer at the Youth Activity Center	\$ 1,000.00
50	Neurotherapeutics Pediatric Therapies, Inc. 610 High Street Oregon City, OR 95045	N/A	Active	Specialized pediatric therapy equipment at the Medford Children's Therapy clinic	\$ 3,750.00
51	Oasis Shelter Home P.O. Box 932 Gold Beach, OR 97444	N/A	Active	Renovate office space to conduct outreach activities	\$ 8,550.00
52	Oregon Childrens Foundation 101 SW Market St. Portland, OR 97201	N/A	Active	Rogue Valley SMART program	\$ 5,000.00
53	Oregon Childrens Foundation 101 SW Market St. Portland, OR 97201	N/A	Active	South Central SMART program	\$ 5,000.00
54	Oregon Coast Community Action 2110 Newmark Ave. Coos Bay, OR 97420	N/A	Active	Share Bear Snack Pack program	\$ 5,000.00

**Form 990-PF, Part XV, Line 3a**

	<b>Recipient</b>  <b>Name and Address (home or business)</b>	<b>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</b>	<b>Foundation status of recipient</b>	<b>Purpose of grant or contribution</b>	<b>Amount</b>
55	Pregnancy Center of the Illinois Valley P O. Box 993 Cave Junction, OR 97523	N/A	Active	Parenting program incentives	\$ 2,500 00
56	Prospect Charter School 160 Mill Creek Drive Prospect, OR 97536	N/A	Active	Upgrade the softball field at Prospect High School	\$ 3,000 00
57	Rogue Interagency Training Association P.O. Box 1170 Rogue River, OR 97537	N/A	Active	Cargo trailer for firefighter training equipment	\$ 4,000 00
58	Rogue Valley Children's Discovery Museum 101 N Central Ave. Medford, OR 97501	N/A	Active	Build/rebuild hands-on, interactive exhibits at the new Kid Time facility	\$ 5,000.00
59	Society of St Vincent DePaul P.O. Box 1663 Medford, OR 97501	N/A	Active	Back-to-School supplies for Rogue Valley children	\$ 5,000 00
60	The Common Good P.O. Box 564 Port Orford, OR 97465	N/A	Active	Purchase food storage and safety items	\$ 1,700 00
61	Wilderness Trails, Inc. P.O. Box 4655 Medford, OR 97501	N/A	Active	2011 Summer Camp Sponsorships	\$ 3,000 00
62	Winterspring Center for Living with Loss and Grief P.O. Box 8169 Medford, OR 97501	N/A	Active	Provide bereavement support services to children and teens	\$ 2,500 00
63	Women's Coalition of Josephine County 560 NE F St. A430 Grants Pass, OR 97526	N/A	Active	Roof repair, replacement tires on vehicles and some landscape work at the Safe Shelter	\$ 3,650.00
64	YMCA of Klamath County 1221 S Alameda Klamath Falls, OR 97603	N/A	Active	2011 Summer Camp Sponsorships	\$ 5,000.00
<b>TOTAL PAID DURING THIS YEAR</b>					<b>\$308,776 00</b>

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT 1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DA DAVIDSON	303,203.	0.	303,203.
TOTAL TO FM 990-PF, PART I, LN 4	303,203.	0.	303,203.

FORM 990-PF	LEGAL FEES	STATEMENT 2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	2,665.	0.		2,665.
TO FM 990-PF, PG 1, LN 16A	2,665.	0.		2,665.

FORM 990-PF	ACCOUNTING FEES	STATEMENT 3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	5,375.	2,688.		2,687.
PAYROLL MANAGEMENT FEE	381.	0.		381.
TO FORM 990-PF, PG 1, LN 16B	5,756.	2,688.		3,068.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT 4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	85,503.	85,503.		0.
INVESTMENT EXPENSE	0.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	85,503.	85,503.		0.

FORM 990-PF	TAXES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	2,474.	0.		2,474.
STATE TAX	895.	0.		895.
FEDERAL TAXES	4,300.	0.		4,300.
PROPERTY TAXES	1,881.	0.		1,881.
TO FORM 990-PF, PG 1, LN 18	9,550.	0.		9,550.

FORM 990-PF	OTHER EXPENSES		STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	5,162.	0.		5,162.
INSURANCE	1,377.	0.		1,377.
MISCELLANEOUS	110.	0.		110.
OFFICE EXPENSE	548.	0.		548.
PUBLIC RELATIONS	3,987.	0.		3,987.
UTILITIES	2,419.	0.		2,419.
SUPPLIES	608.	0.		608.
BUILDING REPAIRS & MAINTENANCE	927.	0.		927.
START UP EXPENSES	526.	0.		526.
TO FORM 990-PF, PG 1, LN 23	15,664.	0.		15,664.

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
SECURITIES	8,620,500.		8,259,094.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	8,620,500.		8,259,094.	



FORM 990-PF	OTHER ASSETS	STATEMENT	8
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
DUE FROM CHANEY FOUNDATION	0.	25,136.	25,136.
TO FORM 990-PF, PART II, -LINE 15	0.	25,136.	25,136.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	9
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DUE TO CHANEY FOUNDATION	16,482.	0.
OREGON TAX PAYABLE	968.	895.
FEDERAL TAX PAYABLE	0.	748.
TOTAL TO FORM 990-PF, PART II, LINE 22	17,450.	1,643.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	10
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NAME OF MANAGER

STEVEN WEST  
CAROLYN WEST

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 11

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CARRIE HANSON, EXECUTIVE DIRECTOR  
680 G STREET SUITE B  
JACKSONVILLE, OR 97530

## TELEPHONE NUMBER

(541) 899-9976

## FORM AND CONTENT OF APPLICATIONS

INTERNET APPLICATION FORM FOUND ON WEBSITE

## ANY SUBMISSION DEADLINES

THE LAST BUSINESS DAY IN FEBRUARY AND AUGUST

## RESTRICTIONS AND LIMITATIONS ON AWARDS

DISTRIBUTIONS WILL BE MADE WHICH PRIMARILY BENEFIT AREAS OF PUBLIC SCHOOL ENRICHMENT, HUMAN SERVICES, AND OTHER CHARITABLE CAUSES TO PROVIDE A BETTER OPPORTUNITY IN LIFE FOR CHILDREN AND THEIR FAMILIES WHO RESIDE IN THE GEOGRAPHIC AREAS OF SOUTHERN OREGON; JACKSON, JOSEPHINE, CURRY, AND KLAMATH COUNTIES.

THE FOLLOWING ACTIVITIES ARE INELIGIBLE FOR FUNDING: ENDOWMENTS OR ANNUAL FUND DRIVES, INDIRECT OR OVERHEAD EXPENSES, SPONSORSHIP OF FUNDRAISING EVENTS, AND VISUAL AND PERFORMING ARTS PROGRAMS (HOWEVER SOME SCHOOL-BASED PROJECTS MAY QUALIFY), PROJECTS THAT HAVE A SPECIFIC RELIGIOUS PURPOSE, PROPERTY ACQUISITION OR MULTI-MILLION DOLLAR CAPITAL CAMPAIGNS.