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Form

990-PF

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.

Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT		<b>A Employer identification number</b>  93-1100080	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 7068		<b>B Telephone number</b> (see instructions)  (541) 686-1242	
City or town, state or province, country, and ZIP or foreign postal code SPRINGFIELD, OR 974750068		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input type="checkbox"/> \$ 5,055,366		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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) (see instructions) )		(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 (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments	6,006	6,006		
	4 Dividends and interest from securities. . . . .				
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-424,326			
	b Gross sales price for all assets on line 6a 1,347,790				
	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				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	-418,320	6,006		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule). . . . .				
	b Accounting fees (attach schedule). . . . .	1,641	260		1,381
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	575	0		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule). . . . .	3,577	0		3,577
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	5,793	260		4,958
	25 Contributions, gifts, grants paid . . . . .	719,060			719,060
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	724,853	260		724,018
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-1,143,173			
	b <b>Net investment income</b> (if negative, enter -0-)		5,746		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	3,242,832	4,227,929	4,227,929
	3	Accounts receivable ▶ 29,837			
		Less allowance for doubtful accounts ▶	392,782	29,837	29,837
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	2,098,938	797,600	797,600
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶				
12	Investments—mortgage loans . . . . .				
13	Investments—other (attach schedule) . . . . .				
14	Land, buildings, and equipment basis ▶				
	Less accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,734,552	5,055,366	5,055,366	
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 (attach schedule) . . . . .			
	22	Other liabilities (describe ▶)	328	195	
	23	Total liabilities (add lines 17 through 22) . . . . .	328	195	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> 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	5,734,224	5,055,171	
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	5,734,224	5,055,171	
31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	5,734,552	5,055,366		

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 5,734,224
2	Enter amount from Part I, line 27a . . . . .	2 -1,143,173
3	Other increases not included in line 2 (itemize) ▶	3 464,120
4	Add lines 1, 2, and 3 . . . . .	4 5,055,171
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 5,055,171

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 )
1 a	LOSS ON SALE OF EQUITIES	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 1,347,790		1,772,116	-424,326
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a			-424,326
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	-424,326
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) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

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 page 18 of the 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))
2012	903,319	5,600,333	0 161297
2011	900,956	6,055,296	0 148788
2010	558,764	5,770,186	0 096836
2009	799,501	6,140,219	0 130207
2008	806,300	8,485,468	0 095021

2	Total of line 1, column (d). . . . .	2	0 632149
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	0 126430
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	4,764,100
5	Multiply line 4 by line 3. . . . .	5	602,325
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	57
7	Add lines 5 and 6. . . . .	7	602,382
8	Enter qualifying distributions from Part XII, line 4. . . . .	8	724,018

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>Part VI    Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)</b>			
<b>1a</b> 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)			
<b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		<b>1</b>	57
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		<b>2</b>	0
<b>3</b> Add lines 1 and 2. . . . .		<b>3</b>	57
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		<b>4</b>	0
<b>5</b> <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .		<b>5</b>	57
<b>6</b> Credits/Payments			
<b>a</b> 2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	380	
<b>b</b> Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>		
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b> Backup withholding erroneously withheld . . . . .	<b>6d</b>		
<b>7</b> Total credits and payments. Add lines 6a through 6d. . . . .		<b>7</b>	380
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		<b>8</b>	
<b>9</b> <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .		<b>9</b>	
<b>10</b> <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .		<b>10</b>	323
<b>11</b> Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input checked="" type="checkbox"/> 323 <b>Refunded</b> <input checked="" type="checkbox"/>		<b>11</b>	0

<b>Part VII-A    Statements Regarding Activities</b>			
<b>1a</b> 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? . . . . .		<b>Yes</b>	<b>No</b>
	<b>1a</b>		<b>No</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . . <i>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.</i>			<b>No</b>
	<b>1b</b>		<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<b>1c</b>		<b>No</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation <input checked="" type="checkbox"/> \$ 0 <b>(2)</b> On foundation managers <input checked="" type="checkbox"/> \$ 0			
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0			
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	<b>2</b>		<b>No</b>
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	<b>3</b>		<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<b>4a</b>		<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>4b</b>		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>		<b>No</b>
<b>6</b> 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? . . . . .	<b>6</b>	<b>Yes</b>	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	<b>7</b>	<b>Yes</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> OR _____			
<b>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? <i>If "No," attach explanation.</i>	<b>8b</b>	<b>Yes</b>	
<b>9</b> 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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>		<b>No</b>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>		<b>No</b>

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		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶ WWW.PACIFICSOURCE.COM				
14	The books are in care of ▶ PETER DAVIDSON Telephone no ▶ (541) 686-1242			
	Located at ▶ PO BOX 7068 SPRINGFIELD OR ZIP +4 ▶ 97475			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶	15		
16	At any time during calendar year 2013, 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?	16	Yes	No
	See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶			

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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" 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? ( <b>Exception.</b> 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 <b>any</b> 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)? . . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	1b		
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 2013? . . . . .	1c		No
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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
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 2013 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> ) . . . . .	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2013?	4b		No

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)? (see instructions).

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)?

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?

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

No

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?

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 (see instructions).

(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
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). 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

Form 990-PF (2013)

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). 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	0
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the 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	1,259,001
b	Average of monthly cash balances. . . . .	1b	3,577,649
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	4,836,650
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	4,836,650
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	72,550
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,764,100
6	Minimum investment return. Enter 5% of line 5. . . . .	6	238,205

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	238,205
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	57
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	57
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	238,148
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	238,148
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	238,148

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	724,018
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	724,018
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 (see instructions). . . . .	5	57
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	723,961
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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				238,148
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .	382,340			
b From 2009. . . . .	493,488			
c From 2010. . . . .	270,825			
d From 2011. . . . .	588,403			
e From 2012. . . . .	608,484			
f Total of lines 3a through e. . . . .	2,343,540			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 724,018				
a Applied to 2012, but not more than line 2a			0	
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 2013 distributable amount. . . . .				238,148
e Remaining amount distributed out of corpus	485,870			
5 Excess distributions carryover applied to 2013 (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	2,829,410			
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 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	382,340			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	2,447,070			
10 Analysis of line 9				
a Excess from 2009. . . .	493,488			
b Excess from 2010. . . .	270,825			
c Excess from 2011. . . .	588,403			
d Excess from 2012. . . .	608,484			
e Excess from 2013. . . .	485,870			

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . . .

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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 organization had \$5,000 or more in assets at any time during the year—see 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) )

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

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 or e-mail address of the person to whom applications should be addressed

MARIAN BLANKENSHIP EXECUTIVE DIRECT  
PO BOX 7068  
SPRINGFIELD,OR 97475  
(541) 686-1242  
CHARITABLEFOUNDATION@PACIFICSOURCE.COM

b

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

MICROSOFT WORD DOCUMENT ATTACH PROGRAM BUDGET AND MOST RECENT ANNUAL FINANCIAL STATEMENT

c

Any submission deadlines

SUBMISSION DEADLINES ARE ROLLING THE COMMITTEE MEETS SEMI-ANNUALLY TO REVIEW APPLICATIONS

d

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

PROGRAMS MUST ADDRESS ONE OR MORE OF THE FOLLOWING AREAS HEALTH CARE ACCESS INITIATIVES THAT ADDRESS THE HEALTHCARE NEEDS OF CHILDREN AND YOUTH, AS WELL AS ADULTS WHO HAVE BARRIERS TO CARE AND/OR ADVANCE AND PROMOTE STRATEGIES THAT IMPROVE ACCESS TO HIGH QUALITY HEALTHCARE, TEST AND IMPLEMENT INNOVATIVE CARE MODELS, IMPROVE COMMUNITY HEALTH, AND/OR LOWER COSTS ACROSS THE SYSTEM AND/OR WORK IN PARTNERSHIP WITH PACIFICSOURCE HEALTH PLANS AND ITS MANY BUSINESS PARTNERS AND CUSTOMERS, INCLUDING PHYSICIANS AND OTHER HEALTHCARE PROVIDERS, TO IMPROVE COMMUNITY HEALTH

Part XV

Supplementary Information (continued)

3 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 Additional Data Table				
Total . . . . .			3a	719,060
b Approved for future payment				
Total . . . . .			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)



Form 990PF Part VIII Line 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
KENNETH PROVENCHER	PRESIDENT 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
PATRICIA BUCHANAN MD	DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
GRETCHEN PIERCE	DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
ED DAHLBERG	DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
VERN KATZ MD	DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
JEFF HOUCK MD	DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
MARIAN BLANKENSHIP	EXECUTIVE DIRECTOR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
SUJATA SANGHVI	VICE PRESIDENT 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
KRISTIN KERNUTT	SECRETARY 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
PRISCILLA GOULD	COMMITTEE CHAIR 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				
PETER DAVIDSON	VICE PRESIDENT 1 00	0	0	0
PO BOX 7068 SPRINGFIELD,OR 97475				

Form 990PF Part XV Line 3 - 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)				
<b>a</b> Paid during the year				
BOYS AND GIRLS CLUB CORVALLIS 1112 NW CIRCLE BLVD CORVALLIS,OR 97333	NONE	PC	JOHNSON DENTAL CLINIC COMMUNITY ACCESS AND SERVICES EXPANSION	20,000
CENTER FOR COMMUNITY COUNSELING 1465 COBURG ROAD EUGENE,OR 97405	NONE	PC	CAPACITY-BUILDING PROJECT	20,000
CENTER FOR EVIDENCE-BASED POLICY 3455 SW US VETEREANS HOSPITAL RD SN-4N PORTLAND,OR 97239	NONE	PC	STRATEGIC GRANT FUNDING	15,000
CHILDREN'S HOME SOCIETY OF IDAHO 740 WARM SPRINGS AVE BOISE,ID 83712	NONE	PC	COMMUNITY SPONSORSHIP PROGRAM	10,000
COMMUNITY HEALTH CENTER INC 19 MYRTLE ST MEDFORD,OR 97504	NONE	PC	CREATING RURAL CAPACITY THROUGH COMMUNITY- & SCHOOL-BASED HEALTH CENTER PROGRAMS	20,000
EUGENE HEARING AND SPEECH 1500 WEST 12TH AVE EUGENE,OR 97402	NONE	PC	HARDSHIP FUND SUPPORT PROGRAM	10,000
FAMILIAS EN ACCION 2710 NE 14TH AVE PORTLAND,OR 97212	NONE	PC	STRATEGIC GRANT FUNDING	34,008
FAMILY MEDICINE RESIDENCY OF IDAHO 777 N RAYMOND STREET BOISE,ID 83704	NONE	PC	CREATING IDAHO'S FIRST SCHOOL-BASED HEALTH CLINIC	20,000
GARDEN CITY COMMUNITY CLINIC 215 W 35TH STREET GARDEN CITY,ID 83714	NONE	PC	GARDEN CITY COMMUNITY CLINIC	20,000
HEALTH POLICY RESEARCH NORTHWEST 31772 OWL ROAD EUGENE,OR 97405	NONE	PC	HOSPITALIZATION IN THE MORBIDLY OBESE RESOURCE UTILIZATION AND MORTALITY RISK	2,500
LANE COALITION FOR HEALTHY ACTIVE YOUTH PO BOX 264 EUGENE,OR 97440	NONE	PC	STRATEGIC GRANT FUNDING	25,000
LOOKING GLASS YOUTH AND FAMILY SERVICES 1790 W 11TH SUITE 200 EUGENE,OR 97402	NONE	PC	HEALTH ACCESS AND TREATMENT PROGRAM	20,000
MASLOW PROJECT 500 MONROE ST MEDFORD,OR 97501	NONE	PC	STRATEGIC GRANT	10,000
MEDICAL TEAMS INTERNATIONAL PO BOX 10 PORTLAND,OR 97224	NONE	PC	MOBILE DENTAL PROGRAM	20,000
MOUNTAINSTAR RELIEF NURSERY 2125 NE DAGGETT LANE BEND,OR 97701	NONE	PC	STRATEGIC GRANT	5,000
<b>Total . . . . .</b>  <b>3a</b>				719,060



Form 990PF Part XV Line 3 - 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)				
<b>a</b> Paid during the year				
NORTHEAST OREGON NETWORK 1802 4TH ST STE A LAGRANDE, OR 97850	NONE	PC	NEON RURAL COMMUNITY HEALTH WORKER TRAINING INSTITUTE	30,000
NORTHWEST CATHOLIC COUNSELING 8383 NE SANDY BLVD PORTLAND, OR 97220	NONE	PC	INTEGRATED MEDICATION MANAGEMENT FOR LOWER-INCOME INDIVIDUALS	15,000
OREGON COMMUNITY FOUNDATION 1221 SW YAMHILL SUITE 100 PORTLAND, OR 97205	NONE	PC	EMERGENCY DEPARTMENT UTILIZATION FOR NON-TRAUMATIC DENTAL PROGRAMS	7,500
OREGON SCHOOL-BASED HEALTH CARE NETWORK PO BOX 12191 PORTLAND, OR 97212	NONE	PC	BUILDING SUSTAINABLE SBHC PRACTICES TO ENSURE ACCESS FOR KIDS	20,000
PLANNED PARENTHOOD OF SOUTHWESTERN OREGON 3579 FRANKLIN BLVD EUGENE, OR 974032356	NONE	PC	STRATEGIC GRANT FUNDING	40,000
PROJECT ACCESS NOW PO BOX 10953 PORTLAND, OR 97296	NONE	PC	CONNECTIONS TO CARE	20,000
SALEM FREE CLINICS 1300 BROADWAY ST NE STE 104 SALEM, OR 97308	NONE	PC	SALEM FREE CLINIC'S NURSE PRACTITIONER PROJECT	15,000
SHELTERCARE 499 WEST 4TH AVE EUGENE, OR 97401	NONE	PC	STRATEGIC GRANT FUNDING	29,902
SLOCUM RESEARCH AND EDUCATION 55 COBURG RD EUGENE, OR 97401	NONE	PC	STRATEGIC GRANT FUNDING	5,000
SNAKE RIVER COMMUNITY CLINIC 215 10TH STREET LEWISTON, ID 83501	NONE	PC	CHRONIC RESPIRATORY ILLNESS MEDICATIONS & CONTINUITY OF CARE PROVIDER PROGRAM	6,200
SOUTH LANE CHILDRENS DENTAL CLINIC PO BOX 218 COTTAGE GROVE, OR 97424	NONE	PC	SERVICE EXPANSION PROGRAM	15,000
SOUTH LANE MENTAL HEALTH PO BOX 5 COTTAGE GROVE, OR 97424	NONE	PC	INDIGENT SERVICES PROGRAM	20,000
SPRINGFIELD EDUCATION FOUNDATION PO BOX 663 SPRINGFIELD, OR 97477	NONE	PC	STRATEGIC GRANT FUNDING	5,950
SW COMMUNITY HEALTH CENTER 7754 SW CAPITAL HWY PORTLAND, OR 97219	NONE	PC	STRATEGIC GRANT	20,000
THE CHILD CENTER 3995 MARCOLA ROAD SPRINGFIELD, OR 97477	NONE	PC	WELLNESS PROGRAM DEVELOPMENT LANE AND DESCHUTES COUNTY	13,000
<b>Total . . . . .</b>  <b>3a</b>				719,060

Form 990PF Part XV Line 3 - 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)				
<b>a</b> Paid during the year				
TRAUMA HEALING PROJECT THE 2222 COBURG ROAD SUITE 300 EUGENE,OR 97401	NONE	PC	STRATEGIC GRANT CHARITABLE DONATION	35,000
UNITED WAY OF LANE COUNTY 3171 GATEWAY LOOP SPRINGFIELD,OR 97477	NONE	PC	STRATEGIC GRANT FUNDING	20,000
UNIVERSITY OF COLORADO DENVER SCHOOL OF MEDICINE ACADEMIC OFFICE 1 MAIL STOP F496 12631 EAST 17TH AVENUE AURORA,CO 80045	NONE	PC	SUSTAINING HEALTHCARE ACROSS INTEGRATED PRIMARY CARE EFFORTS PROGRAM IN OREGON	20,000
VIRGINIA GARCIA MEMORIAL FOUNDATION PO BOX 486 CORNELIUS,OR 97113	NONE	PC	STRATEGIC GRANT	25,000
VOLUNTEERS IN MEDICINE 2260 MARCOLA ROAD SPRINGFIELD,OR 97477	NONE	PC	VOLUNTEERS IN MEDICINE	30,000
VOLUNTEERS IN MEDICINE CLINIC OF THE CASCADES 2300 NE NEFF ROAD BEND,OR 97701	NONE	PC	VIM PATIENT SPONSORSHIP AND GENERAL OPERATING SUPPORT	30,000
WASHINGTON COUNTY COMMISSION ON CHILDREN AND FAMILIES 155 N FIRST AVENUE HILLSBORO,OR 971243072	NONE	PC	STRATEGIC GRANT	25,000
WILLAMETTE FAMILY INC 149 W 12TH STREET EUGENE,OR 97401	NONE	PC	BUCKLEY CENTER SOBERING STATION	20,000
<b>Total . . . . .</b>  <b>3a</b>				719,060

## TY 2013 Accounting Fees Schedule

**Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT

**EIN:** 93-1100080

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	1,641	260		1,381

**TY 2013 Investments Corporate  
Stock Schedule**

**Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT  
**EIN:** 93-1100080

Name of Stock	End of Year Book Value	End of Year Fair Market Value
LINE 10B - INVESTMENT CORPORATE STOCK	797,600	797,600

**TY 2013 Other Expenses Schedule****Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT**EIN:** 93-1100080

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PUBLISHING	55	0		55
SAFETY NET CLINIC	3,422	0		3,422
OTHER FEES	100	0		100

TY 2013 Other Increases Schedule

**Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT

**EIN:** 93-1100080

Description	Amount
UNREALIZED GAINS/LOSSES	464,120

TY 2013 Other Liabilities Schedule

**Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT

**EIN:** 93-1100080

Description	Beginning of Year - Book Value	End of Year - Book Value
INCOME TAX PAYABLE	328	195

**TY 2013 Taxes Schedule**

**Name:** PACIFICSOURCE FOUNDATION FOR HEALTH IMPROVEMENT

**EIN:** 93-1100080

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAXES, LICENSES, FEES	575	0		0