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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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 07-01-2013 , and ending 06-30-2014

Name of foundation GORDON ELWOOD FOUNDATION		A Employer identification number 93-1267972	
Number and street (or P O box number if mail is not delivered to street address) 670 SUPERIOR CT		B Telephone number (see instructions) (541) 282-0643	
City or town, state or province, country, and ZIP or foreign postal code MEDFORD, OR 97504		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 8,243,294		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)	28,134			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	7,143	7,143		
	4 Dividends and interest from securities.	160,623	160,623		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 	238,376			
	b Gross sales price for all assets on line 6a 1,050,899				
	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) 	494	494		
	12 Total. Add lines 1 through 11	434,770	168,260		
	13 Compensation of officers, directors, trustees, etc	92,844	0		92,844
	14 Other employee salaries and wages	28,021	0		28,021
	15 Pension plans, employee benefits	29,464	0		29,464
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) 	3,000	0		3,089
	c Other professional fees (attach schedule) 	53,447	46,611		6,836
	17 Interest				
	18 Taxes (attach schedule) (see instructions) 	16,380	1,547		14,833
	19 Depreciation (attach schedule) and depletion . . . 	14,495	0		
	20 Occupancy				
	21 Travel, conferences, and meetings	3,756	0		3,756
	22 Printing and publications				
	23 Other expenses (attach schedule) 	79,293	0		79,368
	24 Total operating and administrative expenses. Add lines 13 through 23	320,700	48,158		258,211
	25 Contributions, gifts, grants paid	178,015			178,015
	26 Total expenses and disbursements. Add lines 24 and 25	498,715	48,158		436,226
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-63,945			
	b Net investment income (if negative, enter -0-)		120,102		
	c Adjusted net income (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	37,728	63,826	63,826
	2	Savings and temporary cash investments			
	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 (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	1,000	1,240	1,240
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	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)	7,067,047	7,792,878	7,792,878
Liabilities	14	Land, buildings, and equipment basis ▶ _____ 507,285 Less accumulated depreciation (attach schedule) ▶ _____ 121,935	399,225	385,350	385,350
	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	7,505,000	8,243,294	8,243,294
	17	Accounts payable and accrued expenses	4,987	4,328	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	4,987	4,328	
		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	7,500,013	8,238,966	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	7,500,013	8,238,966	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	7,505,000	8,243,294	

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	7,500,013
2	Enter amount from Part I, line 27a	2	-63,945
3	Other increases not included in line 2 (itemize) ▶ _____	3	802,898
4	Add lines 1, 2, and 3	4	8,238,966
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	8,238,966

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(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				
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				
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	
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	372,923	6,842,492	0 054501
2011	370,273	5,387,455	0 068729
2010	359,360	6,815,930	0 052724
2009	380,946	6,512,396	0 058496
2008	421,016	6,320,981	0 066606
2 Total of line 1, column (d).			2 0 301056
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 060211
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.			4 7,401,840
5 Multiply line 4 by line 3.			5 445,672
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 1,201
7 Add lines 5 and 6.			7 446,873
8 Enter qualifying distributions from Part XII, line 4.			8 436,226

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	2,402
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3 Add lines 1 and 2.	3	2,402
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,402
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	2,240
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.	7	2,240
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	162
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
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>	1b		No
c Did the foundation file Form 1120-POL for this year?.	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2 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>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7 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>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ OR _____			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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.GORDONELWOODFOUNDATION.ORG				
14	The books are in care of ▶ KATHY BRYON EXECUTIVE DIRECTOR Telephone no ▶ (541) 282-0643			
	Located at ▶ PO BOX 4189 MEDFORD OR ZIP +4 ▶ 97501			
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		
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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? . . . Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	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 ▶ 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? ☐ Yes ☒ 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

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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 (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
1IN-KIND SUPPORT COVERING OFFICE SPACE, UTILITIES, OFFICE MACHINES, OFFICE SUPPLIES AND CONFERENCE ROOM FOR THREE NON-PROFIT 501(c)3 TENANTS AND THEIR ASSOCIATED PROJECTS, SEE WEB PAGES FOR SPECIFIC GOALS/OUTCOMES OF THE TENANTS SMART www.getsmartoregon.orgJACKSON COUNTY LITERACY COUNCIL www.roguelrc.orgJEFFERSON REGIONAL HEALTH ALLIANCE www.jeffersonregionalhealthalliance.org (including CHOOSING OPTIONS, HONORING OPTIONS www.cohoroguevalley.org and Oregon Pain Guidelines, formerly the Opioid Prescribers Group) http://www.southernoregonopioidmanagement.org	28,134
2COMMUNITY AND LEADERSHIP DEVELOPMENT PROVIDED BY FOUNDATION STAFF AND/OR CONSULTANTS TO CONVENE, COACH, FACILITATE, TRAIN, TRANSCRIBE, ACT AS THINKING PARTNER AND LEVERAGE OPPORTUNITIES TO POSITIVELY IMPACT YOUTH, INDIVIDUALS, FAMILIES, ORGANIZATIONS AND COMMUNITIES IN ALIGNMENT WITH FOUNDATION VISION AND GOALS IN FOUR COUNTIES	110,616
3CASH SUPPORT AND EXPENSE RELATED TO ORGANIZATIONS AND PROJECTS LISTED IN ACTIVITY ONE AND TWO. EXPENSES INCLUDE - SUPPORTING MEETINGS (EXPENSES), WITH COMMUNITY LEADERS AND GROUPS OF LEADERS, AS WELL AS SPEAKERS, EDUCATIONAL AND RESEARCH FEES - SCHOLARSHIPS FOR SELECTED GRANTEES TO ATTEND TRAINING AND SEMINARS	6,592
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	7,437,370
b	Average of monthly cash balances.	1b	77,188
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,514,558
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	7,514,558
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	112,718
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,401,840
6	Minimum investment return. Enter 5% of line 5.	6	370,092

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	370,092
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	2,402
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,402
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	367,690
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	367,690
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	367,690

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	436,226
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	436,226
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	436,226
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				367,690
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			88,772	
b Total for prior years 20__, 20__, 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 436,226				
a Applied to 2012, but not more than line 2a			88,772	
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.				347,454
e Remaining amount distributed out of corpus	0			
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	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 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				20,236
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). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

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

(4) Gross investment income					
-----------------------------	--	--	--	--	--

a. The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

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

DISTRIBUTION OF FUNDS LIMITED FOR EDUCATIONAL, HUMAN SERVICES, AND OTHER CHARITABLE PURPOSES TO QUALIFIED NON-PROFIT, TAX-EXEMPT, CHARITABLE ORGANIZATIONS IN GEOGRAPHIC AREAS OF JACKSON, JOSEPHINE, KLAMATH, COOS & CURRY COUNTIES, OREGON

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	178,015
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
MICHAEL R HEVERLY	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
JANET J MURPHY	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
KATHY BRYON	EXECUTIVE DIRECTOR 40 00	92,844	19,942	0
PO BOX 4189 MEDFORD,OR 97501				
DANIEL KOSMATKA	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
STEPHANIE JOHNSON	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
BURKE RAYMOND	PRESIDENT 2 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
ANNETTE BATZER	SECRETARY 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
JOHN DUKE	VICE PRESIDENT 2 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
JULIA BEATTIE	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				
STEVE BOYARSKY	TRUSTEE 1 00	0	0	0
PO BOX 4189 MEDFORD,OR 97501				

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)				
a <i>Paid during the year</i>				
ACCESS INC 3630 AVIATION WAY MEDFORD,OR 97504		NON PROFIT	GRANT 766	3,250
CASA OF KLAMATH 403 PINE STREET KLAMATH FALLS,OR 97601		NON PROFIT	GRANT 737	6,500
CASA OF CURRY COUNTY 1000 SE STEPHENS STREET ROSEBURG,OR 97470		NON PROFIT	GRANT 780	5,000
CASA OF JACKSON COUNTY 613 MARKET ST MEDFORD,OR 97504		NON PROFIT	GRANT 761	8,000
CHILDRENS ADVOCACY CENTER 816 W 10TH STREET MEDFORD,OR 97501		NON PROFIT	GRANT 756	1,500
COLLEGE DREAMS PO BOX 1407 GRANTS PASS,OR 97526		NON PROFIT	GRANT 741	10,000
COMMUNITY FOUNDATION OF THE KLAMATH BASIN PO BOX 1903 KLAMATH FALLS,OR 97601		NON PROFIT	GRANT 718	5,000
COMMUNITY HEALTH CENTER INC 19 MYRTLE STREET MEDFORD,OR 97504		NON PROFIT	GRANT 713	5,000
COMPASS HOUSE 1032 W MAIN STREET MEDFORD,OR 97501		NON PROFIT	GRANT 773	1,500
FAMILY NURTURING CENTER 212 N OAKDALE MEDFORD,OR 97501		NON PROFIT	GRANT 763	10,000
HEART OF OREGON CORPS PO BOX 279 BEND,OR 97709		NON PROFIT	GRANT 767	5,000
JOSEPHINE COMMUNITY LIBRARIES 200 NWC STREET GRANTS PASS,OR 97526		NON PROFIT	GRANT 739	1,000
KAIROS 715 SW RAMSEY AVE GRANTS PASS,OR 97527		NON PROFIT	GRANT 707	5,000
KID TIME DISCOVERY EXPERIENCE 106 N CENTRAL MEDFORD,OR 97501		NON PROFIT	GRANT 755	8,000
KLAMATH-LAKE CARES 2220 ELDORADO BLVD KLAMATH FALLS,OR 97601		NON PROFIT	GRANT 731	9,700
Total  3a				178,015

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)				
a <i>Paid during the year</i>				
LA CLINICA 3617 S PACIFIC HWY MEDFORD,OR 97501		NON PROFIT	GRANT 687	5,000
MEDIATION WORKS 33 NORTH CENTRAL MEDFORD,OR 97501		NON PROFIT	GRANT 758	9,000
OPTIONS FOR SO OREGON 1215 SW G STREET GRANTS PASS,OR 97526		NON PROFIT	GRANT 743	5,000
OREGON CHILDRENS FOUNDATION 101 SW MARKET STREET PORTLAND,OR 97201		NON PROFIT	GRANT 745	5,000
PHILANTHROPY NORTHWEST 2101 FOURTH AVE STE 650 SEATTLE,WA 98121		NON PROFIT	GRANT 750	2,865
PHOENIX COUNSELING CENTER PO BOX 1257 PHOENIX,OR 97535		NON PROFIT	GRANT 740	8,200
ROGUE FARM CORP PO BOX 533 ASHLAND,OR 97520		NON PROFIT	GRANT 734	8,000
ROGUE FVALLEY FAMILY YMCA 522 WEST SIXTH STREET MEDFORD,OR 97501		NON PROFIT	GRANT 757	2,500
ROGUE VALLEY YOUTH FOR CHRIST 529 EDWARDS STREET MEDFORD,OR 97501		NON PROFIT	GRANT 768	4,000
ROGUE WORKFORCE PARTNERSHIP - SORS 100 E MAIN STE 8 MEDFORD,OR 97501		NON PROFIT	GRANT 777	10,000
SOU FOUNDATION 1250 SISKIYOU BLVD ASHLAND,OR 97520		NON PROFIT	GRANT 779	5,000
SOUTHERN OREGON CHILD & FAMILY COUNCIL PO BOX 3697 CENTRAL POINT,OR 97502		NON PROFIT	GRANT 747	7,500
SOUTHERN OREGON LATINO SCHOLARSHIP FUND PO BOX 1087 MEDFORD,OR 97501		NON PROFIT	GRANT 782	5,281
SOUTHERN OREGON MIND-BODY OUTREACH PO BOX 66 JACKSONVILLE,OR 97530		NON PROFIT	GRANT 765	2,000
ST VINCENT DE PAUL SOCIETY PO BOX 1663 MEDFORD,OR 97501		NON PROFIT	GRANT 736	2,500
Total  3a				178,015

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)				
a <i>Paid during the year</i>				
SUNNY WOLF YOUTH SERVICES PO BOX 233 WOLF CREEK,OR 97497		NON PROFIT	GRANT 732	4,000
SUSTAINABLE VALLEY TECHNOLOGY GROUP PO BOX 1075 MEDFORD,OR 97501		NON PROFIT	GRANT 769	1,000
THE NEIGHBORHOOD FOOD PROJECT PO BOX 1089 ASLAND,OR 97520		NON PROFIT	GRANT 774	5,000
WOMEN'S CRISIS SUPPORT CENTER 560 NE F STREET PMB 430 GRANTS PASS,OR 97526		NON PROFIT	GRANT 764	7,000
ROGUE COMMUNITY COLLEGE (GRANT RETURNED) 3345 REDWOOD HWY GRANTS PASS,OR 97527		NON PROFIT	GRANT RETURNED	-5,281
Total  3a				178,015

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2013
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Name of the organization GORDON ELWOOD FOUNDATION	Employer identification number 93-1267972
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Organization type (check one)

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

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

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

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

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

Name of organization GORDON ELWOOD FOUNDATION	Employer identification number 93-1267972
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Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JEFFERSON REGIONAL HEALTH ALLIANCE 670 SUPERIOR COURT MEDFORD, OR 97504	\$ 5,265	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	LITERACY COUNCIL OF JACKSON COUNTY 670 SUPERIOR COURT MEDFORD, OR 97504	\$ 2,619	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
3	START MAKING A READER TODAY (SMART) 670 SUPERIOR COURT MEDFORD, OR 97504	\$ 20,250	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization GORDON ELWOOD FOUNDATION	Employer identification number 93-1267972
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	IN-KIND SUPPORT FOR OFFICE SPACE, UTILITIES, OFFICE MACHINES AND CONFERENCE ROOM	\$ 5,265	2014-06-30
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	IN-KIND SUPPORT FOR OFFICE SPACE, UTILITIES, OFFICE MACHINES AND CONFERENCE ROOM	\$ 2,619	2014-06-30
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	IN-KIND SUPPORT FOR OFFICE SPACE, UTILITIES, OFFICE MACHINES AND CONFERENCE ROOM	\$ 20,250	2014-06-30
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization GORDON ELWOOD FOUNDATION	Employer identification number 93-1267972
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

Form **4562**
Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2013

Attachment
Sequence No **179**

Name(s) shown on return
GORDON ELWOOD FOUNDATION

Business or activity to which this form relates
Form 990-PF Page 1

Identifying number

93-1267972

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount (see instructions)	1	500,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	2,000,000
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost	
7	Listed property Enter the amount from line 29	7		
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8		
9	Tentative deduction Enter the smaller of line 5 or line 8	9		
10	Carryover of disallowed deduction from line 13 of your 2012 Form 4562	10		
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11		
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11	12		
13	Carryover of disallowed deduction to 2014 Add lines 9 and 10, less line 12	13		

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property) (See instructions)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2013	17	14,433
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B—Assets Placed in Service During 2013 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		617	5 0	HY	S/L	62
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
			27 5 yrs	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2013 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (see instructions.)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	14,495
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V

Listed Property (Include automobiles, certain other vehicles, certain computers, and property used for entertainment, recreation, or amusement.)
Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

Section A—Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No						24b If "Yes," is the evidence written? ☐ Yes ☐ No		
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation/ deduction	(i) Elected section 179 cost
25Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)						25		
26 Property used more than 50% in a qualified business use								
		%						
		%						
		%						
27 Property used 50% or less in a qualified business use								
		%				S/L -		
		%				S/L -		
		%				S/L -		
28 Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1						28		
29 Add amounts in column (i), line 26 Enter here and on line 7, page 1							29	

Section B—Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person
If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

30 Total business/investment miles driven during the year (do not include commuting miles) . . .	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
31 Total commuting miles driven during the year . . .												
32 Total other personal(noncommuting) miles driven . . .												
33 Total miles driven during the year Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use? . . .												

Section C—Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who **are not** more than 5% owners or related persons (see instructions)

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions)		
Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles		

Part VI Amortization

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2013 tax year (see instructions)					
43 Amortization of costs that began before your 2013 tax year				43	
44 Total. Add amounts in column (f) See the instructions for where to report				44	

TY 2013 Accounting Fees Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,000	0		3,089

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Depreciation Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FILE CABINET	2000-01-04	600	600	SL	7 0000000000000	0	0		
DRY ERASE BOARD	2001-06-14	428	428	SL	7 0000000000000	0	0		
FIRST PEARL SOFTWARE	2002-07-08	5,750	5,750	SL	3 0000000000000	0	0		
FIREPROOF FILE CABINET	2005-02-15	629	629	SL	7 0000000000000	0	0		
1 MONITORS, FAX	2006-01-10	330	330	SL	5 0000000000000	0	0		
COMPUTER	2006-06-06	980	980	SL	5 0000000000000	0	0		
108-208 SUPERIOR COURT OFFICE CONDO	2006-12-28	475,276	79,720	SL	39 0000000000000	12,187	0		
SOUNDSTATION CONFERENCE CALL SYSTEM	2007-08-06	520	450	200DB	7 0000000000000	47	0		
HEATING COOLING SYSTEMS (2)	2007-11-05	21,245	18,401	200DB	7 0000000000000	1,896	0		
HP OFFICEJET PRO 8600	2012-07-01	240	40	SL	3 0000000000000	80	0		
IPAD	2013-01-02	670	112	SL	3 0000000000000	223	0		
DELL INSPIRON LAPTOP	2013-11-19	617		SL	5 0000000000000	62	0		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2013 Gain/Loss from Sale of Other Assets Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
DA DAVIDSON		Purchased			110,605	106,696		0	3,909	
DA DAVIDSON		Purchased			940,294	705,827		0	234,467	

TY 2013 General Explanation Attachment

Name: GORDON ELWOOD FOUNDATION
EIN: 93-1267972

Identifier	Return Reference	Explanation
DIRECT CHARITABLE ACTIVITIES BACKGROUND	FORM 990-PF PART IX-A	BEGINNING IN 2003 THE FOUNDATION'S BOARD OF DIRECTORS DECIDED TO INVEST MORE THAN JUST DOLLARS INTO THE FOUR TARGET COUNTIES IN SOUTHERN OREGON TO SUPPORT ITS REGIONAL VISION JACKSON, JOSEPHINE, KLAMATH AND CURRY COUNTIES ARE HOME TO SUCCESSFUL YOUTH AND INDIVIDUALS, THRIVING FAMILIES AND COMMUNITIES AS DEMONSTRATED BY - YOUTH AND INDIVIDUALS THRIVE IN SCHOOL AND IN LIFE - INDIVIDUALS AND FAMILIES LIVE INDEPENDENTLY AND INTERDEPENDENTLY WITH DIGNITY AND RESPECT - COMMUNITIES EVOLVE AS THE SITUATION OF THE PEOPLE WHO LIVE, WORK AND PLAY IN THESE COMMUNITIES CHANGE OVER TIME- YOUTH, INDIVIDUALS, FAMILIES AND THE ORGANIZATIONS THAT SERVE THEM ARE CONNECTED CREATING A UNIQUE AND SUSTAINABLE COMMUNITY FABRIC COMMUNITY SPECIFIC GOALS - LEVERAGE RESOURCES TO BRING ATTENTION TO COMMUNITY HEALTH & VITALIZATION OPPORTUNITIES - CREATE OPPORTUNITIES FOR NEW THINKING AND INNOVATIVE APPROACHES ON COMMUNITY ISSUES - PARTNER WITH PUBLIC AND PRIVATE FUNDERS FOR LEARNING AND ACHIEVING GREATER IMPACT ON COMMUNITY AND REGIONAL ISSUES - ACT AS A CONVENER TO SURFACE UNDERLYING CAUSE OF COMMUNITY ISSUES AND THE OPPORTUNITY FOR CREATIVE RESOLUTION EXPENSES TO PROMOTE AND CARRY OUT THESE GOALS ARE OUTSIDE THE CASH GRANTS ALLOCATED EACH YEAR AND ARE RECORDED AND RECOGNIZED AS PART OF THE FOUNDATION'S ADMINISTRATIVE BUDGET IN 990PF FORM AS DIRECT CHARITABLE ACTIVITIES SPECIFIC 2012-13 ACTIVITY & INFORMATION A COMMUNITY INITIATIVES AND PROGRAM SUPPORTJEFFERSON e FUNDERS FORUM (JeFF)- AFFINITY GROUP IS OF SERVICE TO GRANT MAKING ORGANIZATIONS THAT GRANT OUTSIDE OF THEMSELVES FOR THE PURPOSE OF a BUILDING LEADERSHIP, RESOURCES AND CAPACITY TO SUPPORT THE NONPROFIT SECTOR b SHARING INFORMATION AND PERSPECTIVES ON LOCAL PHILANTHROPY AND THE INTERSECTION WITH PUBLIC FUNDING STREAMS c COOPERATIVELY EXPLORING AND DEVELOPING COMPREHENSIVE AND EFFECTIVE APPROACHES TO FUNDING VIABLE COMMUNITY PROGRAMS OR PROJECTS d SHARING EXPERIENCES AND LEVERAGING IMPACT ON THE COMMUNITIES WE REPRESENT AND SUPPORT e BRINGING TOGETHER REPRESENTATION FROM ALL ASPECTS OF PHILANTHROPY FOR THE PURPOSE OF COMMUNICATING NEEDS, AND BRINGING ABOUT CHANGE AND SHARED RESPONSIBILITY IN AND FOR OUR COMMUNITY SOUTHERN OREGON SUCCESS A 0-24 COLLECTIVE IMPACT INITIATIVE- VISION WE ENVISION FLOURISHING CHILDREN, YOUTH AND FAMILIES PRENATAL TO 24 IN JACKSON AND JOSEPHINE COUNTIES - ALL FAMILIES RECEIVE THE SUPPORT TO NURTURE THEIR CHILDREN - ALL CHILDREN ARE READY FOR KINDERGARTEN - ALL YOUTH SUCCEED IN SCHOOL AND LIFE - WE LIVE IN A THRIVING ECONOMY- MISSION WE WEAVE TOGETHER THE TALENT, EXPERTISE AND RESOURCES OF THE ENTIRE COMMUNITY TO PROMOTE THE WELL-BEING, ACADEMIC SUCCESS FOR OUR CHILDREN, YOUTH AND FAMILIES - OUR STRATEGIES UNDERSTAND AND SUPPORT OUR INDIVIDUAL MISSIONS AND GOALS, IDENTIFY AND INTEGRATE BEST PRACTICES THROUGHOUT THE CONTINUUM, CREATE AND PROMOTE A SHARED REGIONAL AGENDA WITH GOALS THAT ARE COLLABORATIVE, MEASUREABLE, AND ACCOUNTABLEJEFFERSON REGIONAL HEALTH ALLIANCE www jeffersonregionalhealthalliance orgREGIONAL HEALTH AND HEALTH SYSTEM IMPROVEMENT & TRANSFORMATION OVERVIEW AND STRUCTURE IN 2004, A SMALL NUMBER OF INTERESTED COLLABORATORS AND THE GORDON ELWOOD FOUNDATION CONVENED OVER 60 KEY COMMUNITY AND HEALTH CARE LEADERS FROM INSURANCE COMPANIES, HOSPITALS, COUNTY HEALTH DEPARTMENTS, THE LOCAL STATE UNIVERSITY, CORPORATIONS, SCHOOL DISTRICTS, NURSES, AND PHYSICIANS, TO TALK WITH PETER SENGE, MIT RESEARCHER AND WRITER, WELL KNOWN FOR THE FIFTH DISCIPLINE AND CREATING "LEARNING ORGANIZATIONS " THE IMMEDIATE OUTCOME FROM THIS HEALTH CARE LEADERSHIP SUMMIT WAS THE BIRTH OF A "HEALTH CARE THINK TANK" IN 2005 THE SMALL GROUP NAMED THEMSELVES THE JEFFERSON REGIONAL HEALTH ALLIANCE (JRHA) WITH THE PURPOSE TO IMPROVE THE HEALTH AND HEALTHCARE RESOURCES OF SOUTHERN OREGONIANS SINCE THEN, JRHA HAS EVOLVED INCREMENTALLY INTO A SMALL BUT MIGHTY NON-PROFIT AIMED AT ADDRESSING SYSTEMIC ISSUES FROM A HIGHER VANTAGE POINT, AS WELL AS A FACILITATOR/COORDINATOR OF REGIONAL HEALTH CARE SYSTEM RELATED INITIATIVES THE LEADERSHIP COUNCIL MEETINGS FUNCTION AS A VEHICLE FOR CULTIVATING RELATIONSHIPS AMONG THE ALLIANCE MEMBERS AND THEIR ORGANIZATIONS THAT ARE KEY TO THE PROVISION OF HEALTH CARE SERVICES AND NECESSARY TO "SYSTEM RE-THINKING" IN THE REGION JRHA IS ALSO A NEUTRAL PLACE FROM WHICH THE COMMUNITY CAN BEGIN TO BETTER COORDINATE AND LEVERAGE RESOURCES TO ENSURE ACCESS TO CARE, IMPROVED HEALTH STATUS, AND A MORE EFFECTIVE HEALTH CARE DELIVERY SYSTEM IN THE REGION COUNCIL MEMBERS AND SPONSORS ARE DEEPLY INVESTED IN THE HEALTH AND HEALTH CARE SERVICES NEEDED IN THIS PRIMARILY RURAL REGION OF OREGON AND NORTHERN CALIFORNIA MISSION JEFFERSON REGIONAL HEALTH ALLIANCE IS A COLLABORATION OF REGIONAL COMMUNITY LEADERS FROM ALL SECTORS ACTING IN A LEADERSHIP ROLE TO IMPROVE THE HEALTH AND HEALTH CARE RESOURCES OF SOUTHERN OREGONIANS URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR TEAM WE INVISION AN ECOLOGICALLY HEALTHY BEAR CREEK, A WELL-TRAVELLED GREENWAY AND A FULLY APPRECIATED HAWTHORNE PARK WITH GREEN SPACES THAT MAKE UP THE CORRIDOR FROM 10TH STREET TO MCANDREWS ROAD THROUGH THE REVITALIZATION OF THE URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR THE HEALTH OF BEAR CREEK IS RELIANT ON THE REMOVAL OF INVASIVE VEGETATION AND REESTABLISHMENT OF NATIVE PLANTS ALONG THE BANK WHICH CREATES A MORE SUSTAINABLE HABITAT FOR RETURNING SALMON A BEAUTIFUL AND SAFE GEENWAY TRAIL OFFERS EASY ACCESS FOR ALL CITIZENS AND INCLUDES ADEQUATE LIGHTING AND INSPIRING ARTWORK INCLUDING AN INSTALLATION ON THE I-5 OVERPASS PILLARS THE UPGRADES TO HAWTHORNE PARK WILL FACILITATE COMMUNITY FESTIVALS THROUGHOUT THE YEAR THE REVITALIZED CORRIDOR HELPS RE-INVIGORATE CIVIC PRIDE OF PLACE, GENERATES NEW OPPORTUNITIES FOR DOWNTOWN BUSINESSES AND REESTABLISHES HABITAT FOR THE WILDLIFE IN AND ALONG BEAR CREEK WHEN COMPLETE, THE URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR WILL BE VASTLY IMPROVED AS A LOCAL AND REGIONAL ASSET IT WILL ENCOURAGE HEALTHY ACTIVITY IN A RESORATIVE ENVIRONMENT IT WILL BE A PLACE OF PRIDE FOR COMMUNITY MEMBERS AND AN ATTRACTION FOR VISITORS IT WILL CREATIVELY UNITE OUR URBAN CENTER WITH OUR DISTINCTIVE NATURAL ENVIRONMENT NON-PROFIT ORGANIZATION, LEADERSHIP & MANAGEMENT SUPPORT-PROVIDE AS REQUESTED SERVICES OF CONVENING, COACHING, FACILITATING, TRAINING, TRANSCRIBING, AND SERVING AS A THINKING PARTNER TO POSITIVELY IMPACT YOUTH, INDIVIDUALS, FAMILIES, ORGANIZATIONS AND COMMUNITIES IN ALIGNMENT WITH FOUNDATION VISION AND GOALS 51 NONPROFITS ASSISTED WITH FOUNDATION STAFF SUPPORT

TY 2013 Investments - Other Schedule**Name:** GORDON ELWOOD FOUNDATION**EIN:** 93-1267972

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DA DAVIDSON - VANTAGE	FMV	1,100,502	1,100,502
DA DAVIDSON - ATALANTA SOSNOFF	FMV	583,978	583,978
DA DAVIDSON - NJF	FMV	912,366	912,366
DA DAVIDSON - CLEARBRIDGE MULTI	FMV	1,060,972	1,060,972
DA DAVIDSON - BRANDES ALL CAP VALUE	FMV	790,904	790,904
DA DAVIDSON - WINSLOW	FMV	842,811	842,811
DA DAVIDSON - THORNBURG	FMV	501,650	501,650
DA DAVIDSON - ADVISOR ACCOUNT	FMV	1,997,925	1,997,925
DA DAVIDSON - MGD ASSETS DIA	FMV	1,770	1,770

TY 2013 Land, Etc. Schedule**Name:** GORDON ELWOOD FOUNDATION**EIN:** 93-1267972

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FILE CABINET	600	600	0	0
DRY ERASE BOARD	428	428	0	0
FIRST PEARL SOFTWARE	5,750	5,750	0	0
FIREPROOF FILE CABINET	629	629	0	0
1 MONITORS, FAX	330	330	0	0
COMPUTER	980	980	0	
108-208 SUPERIOR COURT OFFICE CONDO	475,276	91,907	383,369	383,369
SOUNDSTATION CONFERENCE CALL SYSTEM	520	497	23	23
HEATING COOLING SYSTEMS (2)	21,245	20,297	948	948
HP OFFICEJET PRO 8600	240	120	120	120
IPAD	670	335	335	335
DELL INSPIRON LAPTOP	617	62	555	555

TY 2013 Other Expenses Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE SUPPLIES	3,923	0		3,923
POSTAGE	156	0		156
INSURANCE	2,419	0		2,419
TELECOMMUNICATIONS	3,051	0		3,051
BOARD MEETING EXPENSES	7,534	0		7,534
DUES & SUBSCRIPTIONS	4,488	0		4,488
CONTRACT SERVICES	8,687	0		8,687
PROFESSIONAL DEVELOPMENT	6,875	0		6,875
COMMUNITY DEVELOPMENT	10,592	0		10,667
UTILITIES	2,682	0		2,682
IN-KIND EXPENSES	28,134	0		28,134
LIBRARY	0	0		0
EQUIPMENT REPAIR AND MAINTENANCE	0	0		0
PRINTING	752	0		752

TY 2013 Other Income Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Erisa settlement and Worldcom	494	494	494

TY 2013 Other Increases Schedule

Name: GORDON ELWOOD FOUNDATION

EIN: 93-1267972

Description	Amount
UNREALIZED GAIN	802,898

TY 2013 Other Professional Fees Schedule**Name:** GORDON ELWOOD FOUNDATION**EIN:** 93-1267972

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	46,611	46,611		0
PROPERTY MANAGEMENT FEES	6,836	0		6,836

TY 2013 Taxes Schedule**Name:** GORDON ELWOOD FOUNDATION**EIN:** 93-1267972

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	2,088	0		2,088
FOREIGN TAXES	1,547	1,547		0
CORPORATE FEE	50	0		50
PAYROLL TAXES	11,850	0		11,850
STATE TAXES	845	0		845