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

OMB No 1545 0052

**2015**

Open to Public Inspection

For calendar year 2015, or tax year beginning 7/01, 2015, and ending 6/30, 2016

GORDON ELWOOD FOUNDATION  
670 SUPERIOR CT #108  
MEDFORD, OR 97504**A** Employer identification number  
93-1267972**B** Telephone number (see instructions)  
(541) 282-0643

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

**H** Check type of organization: ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, column (c), line 16)  
\$ 7,250,293.

**J** Accounting method: ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_  
(Part I, column (d) must be on cash basis.)

**C** If exemption application is pending, check here ☐**D 1** Foreign organizations, check here ☐**2** Foreign organizations meeting the 85% test, check here and attach computation ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ☐**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐**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) |
|---------------------------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| <b>1</b> Contributions, gifts, grants, etc. (attach schedule)                                     | 36,919.                            |                           |                         |                                                             |
| <b>2</b> Ck <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B |                                    |                           |                         |                                                             |
| <b>3</b> Interest on savings and temporary cash investments                                       | 7,112.                             | 7,112.                    |                         |                                                             |
| <b>4</b> Dividends and interest from securities                                                   | 135,653.                           | 135,653.                  |                         |                                                             |
| <b>5a</b> Gross rents                                                                             |                                    |                           |                         |                                                             |
| <b>b</b> Net rental income or (loss)                                                              |                                    |                           |                         |                                                             |
| <b>6a</b> Net gain or (loss) from sale of assets not on line 10                                   | 208,663.                           | STATEMENT 1               |                         |                                                             |
| <b>b</b> Gross sales price for all assets on line 6a                                              | 1,367,034.                         |                           |                         |                                                             |
| <b>7</b> Capital gain net income (from Part IV, line 2)                                           |                                    |                           |                         |                                                             |
| <b>8</b> Net short term capital gain                                                              |                                    |                           |                         |                                                             |
| <b>9</b> Income modifications                                                                     |                                    |                           |                         |                                                             |
| <b>10a</b> Gross sales less returns and allowances                                                |                                    |                           |                         |                                                             |
| <b>b</b> Less: Cost of goods sold                                                                 |                                    |                           |                         |                                                             |
| <b>c</b> Gross profit or (loss) (attach schedule)                                                 |                                    |                           |                         |                                                             |
| <b>11</b> Other income (attach schedule)                                                          |                                    |                           |                         |                                                             |
| <b>12</b> Total. Add lines 1 through 11                                                           | 695.                               | 695.                      |                         |                                                             |
| <b>13</b> Compensation of officers, directors, trustees, etc.                                     | 389,042.                           | 143,460.                  | 0.                      |                                                             |
| <b>14</b> Other employee salaries and wages                                                       | 106,655.                           |                           |                         | 106,655.                                                    |
| <b>15</b> Pension plans, employee benefits                                                        | 35,756.                            |                           |                         | 35,756.                                                     |
| <b>16a</b> Legal fees (attach schedule)                                                           | 20,765.                            |                           |                         | 20,765.                                                     |
| <b>b</b> Accounting fees (attach sch)                                                             | 1,800.                             |                           |                         | 1,800.                                                      |
| <b>c</b> Other prof fees (attach sch)                                                             | 63,000.                            | 55,179.                   |                         | 7,821.                                                      |
| <b>17</b> Interest                                                                                |                                    |                           |                         |                                                             |
| <b>18</b> Taxes (attach schedule)(see instrs)                                                     | 11,359.                            |                           |                         | 11,359.                                                     |
| <b>19</b> Depreciation (attach schedule) and depletion                                            | 12,523.                            |                           |                         |                                                             |
| <b>20</b> Occupancy                                                                               | 2,515.                             |                           |                         | 2,515.                                                      |
| <b>21</b> Travel, conferences, and meetings                                                       | 3,985.                             |                           |                         | 3,985.                                                      |
| <b>22</b> Printing and publications                                                               |                                    |                           |                         |                                                             |
| <b>23</b> Other expenses (attach schedule)                                                        |                                    |                           |                         |                                                             |
| <b>24</b> Total operating and administrative expenses. Add lines 13 through 23                    | 92,963.                            |                           |                         | 92,963.                                                     |
| <b>25</b> Contributions, gifts, grants paid                                                       | 351,321.                           | 55,179.                   |                         | 283,619.                                                    |
| <b>26</b> Total expenses and disbursements. Add lines 24 and 25                                   | 193,560.                           |                           |                         | 193,560.                                                    |
| <b>27</b> Subtract line 26 from line 12.                                                          | 544,881.                           | 55,179.                   | 0.                      | 477,179.                                                    |
| <b>a</b> Excess of revenue over expenses and disbursements                                        | -155,839.                          |                           |                         |                                                             |
| <b>b</b> Net investment income (if negative, enter -0-)                                           |                                    | 88,281.                   |                         |                                                             |
| <b>c</b> Adjusted net income (if negative, enter -0-)                                             |                                    |                           | 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                                                                                             |                                                     | 70,070.               | 71,224.     | 71,224.    |
|                             | 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 sch)                                                                           |                                                     |                       |             |            |
|                             |                                                                          | Less: allowance for doubtful accounts                                                                                   |                                                     |                       |             |            |
|                             | 8                                                                        | Inventories for sale or use                                                                                             |                                                     |                       |             |            |
|                             | 9                                                                        | Prepaid expenses and deferred charges                                                                                   |                                                     | 2,440.                | 4,457.      | 4,457.     |
|                             | 10a                                                                      | Investments — U.S. and state government obligations (attach schedule)                                                   |                                                     |                       |             |            |
|                             | b                                                                        | Investments — corporate stock (attach schedule)                                                                         |                                                     |                       |             |            |
|                             | c                                                                        | Investments — corporate bonds (attach schedule)                                                                         |                                                     |                       |             |            |
|                             | LIABILITIES                                                              | 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                                                                                   | 513,594.                                            |                       |             |            |
|                             |                                                                          | Less: accumulated depreciation (attach schedule)                                                                        | 147,931.                                            | 371,877.              | 365,663.    | 365,663.   |
| 15                          |                                                                          | Other assets (describe)                                                                                                 |                                                     |                       |             |            |
| 16                          |                                                                          | <b>Total assets</b> (to be completed by all filers — see the instructions. Also, see page 1, item i)                    |                                                     | 7,873,726.            | 7,250,294.  | 7,250,293. |
| 17                          |                                                                          | Accounts payable and accrued expenses                                                                                   |                                                     | 5,314.                | 6,014.      |            |
| 18                          |                                                                          | Grants payable                                                                                                          |                                                     |                       |             |            |
| NET ASSETS OR FUND BALANCES | 19                                                                       | Deferred revenue                                                                                                        |                                                     |                       |             |            |
|                             | 20                                                                       | Loans from officers, directors, trustees, & other disqualified persons                                                  |                                                     |                       |             |            |
|                             | 21                                                                       | Mortgages and other notes payable (attach schedule)                                                                     |                                                     |                       |             |            |
|                             | 22                                                                       | Other liabilities (describe)                                                                                            |                                                     |                       |             |            |
|                             | 23                                                                       | <b>Total liabilities</b> (add lines 17 through 22)                                                                      |                                                     | 5,314.                | 6,014.      |            |
|                             |                                                                          | <b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b>               | <input checked="" type="checkbox"/>                 |                       |             |            |
|                             | 24                                                                       | Unrestricted                                                                                                            |                                                     | 7,868,412.            | 7,244,280.  |            |
|                             | 25                                                                       | Temporarily restricted                                                                                                  |                                                     |                       |             |            |
|                             | 26                                                                       | Permanently restricted                                                                                                  |                                                     |                       |             |            |
|                             |                                                                          | <b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b>                            | <input type="checkbox"/>                            |                       |             |            |
| 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                          | <b>Total net assets or fund balances</b> (see instructions)              |                                                                                                                         | 7,868,412.                                          | 7,244,280.            |             |            |
| 31                          | <b>Total liabilities and net assets/fund balances</b> (see instructions) |                                                                                                                         | 7,873,726.                                          | 7,250,294.            |             |            |

## 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 | 7,868,412. |
| 2 | Enter amount from Part I, line 27a                                                                                                                         | 2 | -155,839.  |
| 3 | Other increases not included in line 2 (itemize)                                                                                                           | 3 |            |
| 4 | Add lines 1, 2, and 3                                                                                                                                      | 4 | 7,712,573. |
| 5 | Decreases not included in line 2 (itemize) <b>SEE STATEMENT 9</b>                                                                                          | 5 | 468,293.   |
| 6 | Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30                                                      | 6 | 7,244,280. |

**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 shares MLC Company) |  | (b) How acquired<br>P — Purchase<br>D — Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1 a N/A                                                                                                                                  |  |                                                  |                                      |                                  |
| b                                                                                                                                        |  |                                                  |                                      |                                  |
| c                                                                                                                                        |  |                                                  |                                      |                                  |
| d                                                                                                                                        |  |                                                  |                                      |                                  |
| e                                                                                                                                        |  |                                                  |                                      |                                  |

  

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(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 |                                      |                                                 | (l) Gains (Col. (h)<br>gain minus col. (k), but not less<br>than -0-) or Losses (from col. (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| (i) F.M.V.<br>as of 12/31/69                                                                | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any |                                                                                                 |
| a                                                                                           |                                      |                                                 |                                                                                                 |
| b                                                                                           |                                      |                                                 |                                                                                                 |
| c                                                                                           |                                      |                                                 |                                                                                                 |
| d                                                                                           |                                      |                                                 |                                                                                                 |
| e                                                                                           |                                      |                                                 |                                                                                                 |

  

|                                                                                                                                                                                                                                        |          |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|--|
| 2 Capital gain net income or (net capital loss). <span style="float: right;">[ If gain, also enter in Part I, line 7<br/>If (loss), enter -0- in Part I, line 7 ]</span>                                                               | <b>2</b> |  |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br><br>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 <span style="float: right;">]</span> | <b>3</b> |  |

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

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

| 1 Enter the appropriate amount in each column for each year, see the instructions before making any entries |                                       |                                              |                                                          |
|-------------------------------------------------------------------------------------------------------------|---------------------------------------|----------------------------------------------|----------------------------------------------------------|
| (a) Base period years<br>Calendar year (or tax year<br>beginning in)                                        | (b) Adjusted qualifying distributions | (c) Net value of<br>noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
| 2014                                                                                                        | 413,835.                              | 7,537,415.                                   | 0.054904                                                 |
| 2013                                                                                                        | 436,226.                              | 7,401,840.                                   | 0.058935                                                 |
| 2012                                                                                                        | 372,923.                              | 6,842,492.                                   | 0.054501                                                 |
| 2011                                                                                                        | 370,273.                              | 5,387,455.                                   | 0.068729                                                 |
| 2010                                                                                                        | 359,360.                              | 6,815,930.                                   | 0.052724                                                 |

  

|                                                                                                                                                                                |          |            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------|
| 2 Total of line 1, column (d)                                                                                                                                                  | <b>2</b> | 0.289793   |
| 3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years | <b>3</b> | 0.057959   |
| 4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5                                                                                                 | <b>4</b> | 7,448,686. |
| 5 Multiply line 4 by line 3                                                                                                                                                    | <b>5</b> | 431,718.   |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | <b>6</b> | 883.       |
| 7 Add lines 5 and 6                                                                                                                                                            | <b>7</b> | 432,601.   |
| 8 Enter qualifying distributions from Part XII, line 4                                                                                                                         | <b>8</b> | 477,179.   |

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

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

|                                                                                                                                                                                                                                   |                 |      |      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|------|------|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1<br>Date of ruling or determination letter _____ (attach copy of letter if necessary – see instrs) |                 |      |      |
| 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                                                                      |                 | 1    | 883. |
| 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    | 883. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                     |                 | 4    | 0.   |
| 5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                  |                 | 5    | 883. |
| 6 Credits/Payments                                                                                                                                                                                                                |                 |      |      |
| a 2015 estimated tax pmts and 2014 overpayment credited to 2015                                                                                                                                                                   | 6 a             | 223. |      |
| b Exempt foreign organizations – tax withheld at source                                                                                                                                                                           | 6 b             |      |      |
| c Tax paid with application for extension of time to file (Form 8868)                                                                                                                                                             | 6 c             |      |      |
| d Backup withholding erroneously withheld                                                                                                                                                                                         | 6 d             |      |      |
| 7 Total credits and payments. Add lines 6a through 6d                                                                                                                                                                             | 7               | 223. |      |
| 8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached                                                                                             | 8               | 17.  |      |
| 9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>                                                                                                                                     | 9               | 677. |      |
| 10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>                                                                                                                        | 10              |      |      |
| 11 Enter the amount of line 10 to be <b>Credited to 2016 estimated tax</b>                                                                                                                                                        |                 |      |      |
|                                                                                                                                                                                                                                   | <b>Refunded</b> | 11   |      |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                                     | Yes | No  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| 1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                                            |     | X   |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?<br><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> |     | X   |
| c Did the foundation file <b>Form 1120-POL</b> for this year?                                                                                                                                                                                                                                                                                       |     | X   |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.<br>(1) On the foundation ▶ \$ 0. (2) On foundation managers ▶ \$ 0.                                                                                                                                                                            |     |     |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.                                                                                                                                                                                                      |     |     |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If 'Yes,' attach a detailed description of the activities</i>                                                                                                                                                                               |     | X   |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>                                                                                                                 |     | X   |
| 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                                     |     | X   |
| b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?                                                                                                                                                                                                                                                                           |     | N/A |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If 'Yes,' attach the statement required by General Instruction T</i>                                                                                                                                                                         |     | X   |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either<br>• By language in the governing instrument, or<br>• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?                 | X   |     |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, col (c), and Part XV</i>                                                                                                                                                                                                           | X   |     |
| 8 a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶<br>N/A                                                                                                                                                                                                                                     |     |     |
| 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>                                                                                                                                | X   |     |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>                                                                                       |     | X   |
| 10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>                                                                                                                                                                                                        |     | X   |

BAA

Form 990-PF (2015)

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

|    |                                                                                                                                                                                                                                                                                                                                       |    |   |   |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---|---|
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)                                                                                                                                               | 11 |   | X |
| 12 | Did the foundation 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 |   | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address <u>WWW.GORDONELWOODFOUNDATION.ORG</u>                                                                                                                                                          | 13 | X |   |
| 14 | The books are in care of <u>KATHY BRYON, EXEC. DIR.</u> Telephone no <u>(541) 282-0643</u><br>Located at <u>670 SUPERIOR CT. UNIT 108 MEDFORD OR</u> ZIP + 4 <u>97504</u>                                                                                                                                                             |    |   |   |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year <u>N/A</u>                                                                                                                                        |    |   |   |
| 16 | At any time during calendar year 2015, 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?<br>See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country <u></u> | 16 |   | X |

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

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Yes                                                                 | No  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-----|
| <b>1 a</b> 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? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)                                                                                                                                                                                                                                                          | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |     |
| <b>b</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 instructions)? Organizations relying on a current notice regarding disaster assistance check here <u></u>                                                                                                                                                                                 | 1 b                                                                 | N/A |
| <b>c</b> 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 2015?                                                                                                                                                                                                                                                                                                         | 1 c                                                                 | X   |
| <b>2</b> 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))                                                                                                                                                                                                                                                                                                                   |                                                                     |     |
| <b>a</b> At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?<br>If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>                                                                                                                                                                                                                                                                                  | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |     |
| <b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions)                                                                                                                                                                                 | 2 b                                                                 | N/A |
| <b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>                                                                                                                                                                                                                                                                                                                                                |                                                                     |     |
| <b>3 a</b> 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>b</b> If 'Yes,' did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.) | 3 b                                                                 | N/A |
| <b>4 a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                               | 4 a                                                                 | X   |
| <b>b</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 2015?                                                                                                                                                                                                                                                               | 4 b                                                                 | X   |

BAA

Form 990-PF (2015)

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5 a** 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 4945(d)(4)(A)? (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)?

5 b

N/A

Organizations relying on a current notice regarding disaster assistance check here

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

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).

**6 a** 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?

6 b

X

If 'Yes' to 6b, file Form 8870

**7 a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7 b

**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 STATEMENT 10     |                                                           | 106,655.                                  | 0.                                                                    | 0.                                    |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |

**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

**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 SEE STATEMENT 11 |          |
|                    | 32,060.  |
| 2 SEE STATEMENT 12 |          |
|                    | 136,340. |
| 3 SEE STATEMENT 13 |          |
|                    | 7,637.   |
| 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 N/A                                                                                                            |        |
| 2                                                                                                                |        |
| All other program-related investments See instructions                                                           |        |
| 3                                                                                                                |        |
| Total. Add lines 1 through 3                                                                                     | 0.     |

BAA

Form 990-PF (2015)

**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                                                             | 1 a | 7,380,178. |
| b | Average of monthly cash balances                                                                            | 1 b | 181,940.   |
| c | Fair market value of all other assets (see instructions)                                                    | 1 c |            |
| d | <b>Total</b> (add lines 1a, b, and c)                                                                       | 1 d | 7,562,118. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)   | 1 e | 0.         |
| 2 | Acquisition indebtedness applicable to line 1 assets                                                        | 2   | 0.         |
| 3 | Subtract line 2 from line 1d                                                                                | 3   | 7,562,118. |
| 4 | Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)   | 4   | 113,432.   |
| 5 | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5   | 7,448,686. |
| 6 | <b>Minimum investment return.</b> Enter 5% of line 5                                                        | 6   | 372,434.   |

**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   | 372,434. |
| 2a | Tax on investment income for 2015 from Part VI, line 5                                                    | 2 a | 883.     |
| b  | Income tax for 2015 (This does not include the tax from Part VI)                                          | 2 b |          |
| c  | Add lines 2a and 2b                                                                                       | 2 c | 883.     |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1                                     | 3   | 371,551. |
| 4  | Recoveries of amounts treated as qualifying distributions                                                 | 4   |          |
| 5  | Add lines 3 and 4                                                                                         | 5   | 371,551. |
| 6  | Deduction from distributable amount (see instructions)                                                    | 6   |          |
| 7  | <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7   | 371,551. |

**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                                                                        | 1 a | 477,179. |
| b | Program-related investments — total from Part IX-B                                                                                                   | 1 b |          |
| 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)                                                                                                       | 3 a |          |
| b | Cash distribution test (attach the required schedule)                                                                                                | 3 b |          |
| 4 | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                    | 4   | 477,179. |
| 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   | 883.     |
| 6 | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                                                | 6   | 476,296. |

**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)<br>Corpus | (b)<br>Years prior to 2014 | (c)<br>2014 | (d)<br>2015 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2015 from Part XI, line 7                                                                                                                       |               |                            |             |             |
| 2 Undistributed income, if any, as of the end of 2015.                                                                                                                     |               |                            |             | 371,551.    |
| a Enter amount for 2014 only                                                                                                                                               |               |                            | 0.          |             |
| b Total for prior years 20 __, 20 __, 20 __                                                                                                                                |               | 0.                         |             |             |
| 3 Excess distributions carryover, if any, to 2015.                                                                                                                         |               |                            |             |             |
| a From 2010                                                                                                                                                                |               |                            |             |             |
| b From 2011                                                                                                                                                                |               |                            |             |             |
| c From 2012                                                                                                                                                                |               |                            |             |             |
| d From 2013                                                                                                                                                                |               |                            |             |             |
| e From 2014                                                                                                                                                                | 18,945.       |                            |             |             |
| f Total of lines 3a through e                                                                                                                                              | 18,945.       |                            |             |             |
| 4 Qualifying distributions for 2015 from Part XII, line 4: \$ 477,179.                                                                                                     |               |                            |             |             |
| a Applied to 2014, 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 2015 distributable amount                                                                                                                                     |               |                            |             |             |
| e Remaining amount distributed out of corpus                                                                                                                               | 105,628.      |                            |             | 371,551.    |
| 5 Excess distributions carryover applied to 2015 (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                                                                                                                          | 124,573.      |                            |             |             |
| 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 2014 Subtract line 4a from line 2a Taxable amount - see instructions                                                                            |               |                            | 0.          |             |
| f Undistributed income for 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2016                                                                |               |                            |             | 0.          |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)       | 0.            |                            |             |             |
| 8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)                                                                              | 0.            |                            |             |             |
| 9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a                                                                                              | 124,573.      |                            |             |             |
| 10 Analysis of line 9:                                                                                                                                                     |               |                            |             |             |
| a Excess from 2011                                                                                                                                                         |               |                            |             |             |
| b Excess from 2012                                                                                                                                                         |               |                            |             |             |
| c Excess from 2013                                                                                                                                                         |               |                            |             |             |
| d Excess from 2014                                                                                                                                                         | 18,945.       |                            |             |             |
| e Excess from 2015                                                                                                                                                         | 105,628.      |                            |             |             |

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**Part VII** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

| Recipient<br>Name and address (home or business)                                          | If recipient is an individual,<br>show any relationship to any<br>foundation manager or<br>substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution | Amount   |
|-------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-------------------------------------|----------|
| <i>a Paid during the year</i><br>SEE ATTACHED LIST<br>670 SUPERIOR CT<br>MEDFORD OR 97504 | NONE                                                                                                               | NONPROFIT                            | PROJECTS LISTED                     | 193,560. |
| <b>Total</b>                                                                              |                                                                                                                    |                                      | <b>3 a</b>                          | 193,560. |
| <i>b Approved for future payment</i>                                                      |                                                                                                                    |                                      |                                     |          |
| <b>Total</b>                                                                              |                                                                                                                    |                                      | <b>3 b</b>                          |          |

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

Enter gross amounts unless otherwise indicated

| Enter gross amounts unless otherwise indicated |                                                          | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See instructions.) |
|------------------------------------------------|----------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|--------------------------------------------------------------------|
|                                                |                                                          | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>Amount |                                                                    |
| 1                                              | Program service revenue.                                 |                           |               |                                      |               |                                                                    |
| a                                              |                                                          |                           |               |                                      |               |                                                                    |
| b                                              |                                                          |                           |               |                                      |               |                                                                    |
| c                                              |                                                          |                           |               |                                      |               |                                                                    |
| d                                              |                                                          |                           |               |                                      |               |                                                                    |
| e                                              |                                                          |                           |               |                                      |               |                                                                    |
| f                                              |                                                          |                           |               |                                      |               |                                                                    |
| g                                              | Fees and contracts from government agencies.             |                           |               |                                      |               |                                                                    |
| 2                                              | Membership dues and assessments                          |                           |               |                                      |               |                                                                    |
| 3                                              | Interest on savings and temporary cash investments       |                           |               | 14                                   | 7,112.        |                                                                    |
| 4                                              | Dividends and interest from securities                   |                           |               | 14                                   | 135,653.      |                                                                    |
| 5                                              | Net rental income or (loss) from real estate             |                           |               |                                      |               |                                                                    |
| a                                              | Debt-financed property                                   |                           |               |                                      |               |                                                                    |
| b                                              | Not debt-financed property                               |                           |               |                                      |               |                                                                    |
| 6                                              | Net rental income or (loss) from personal property       |                           |               |                                      |               |                                                                    |
| 7                                              | Other investment income                                  |                           |               |                                      |               |                                                                    |
| 8                                              | Gain or (loss) from sales of assets other than inventory |                           |               | 3                                    | 208,663.      |                                                                    |
| 9                                              | Net income or (loss) from special events                 |                           |               |                                      |               |                                                                    |
| 10                                             | Gross profit or (loss) from sales of inventory           |                           |               |                                      |               |                                                                    |
| 11                                             | Other revenue                                            |                           |               |                                      |               |                                                                    |
| a                                              | <b>MISCELLANEOUS</b>                                     |                           |               | 14                                   | 695.          |                                                                    |
| b                                              |                                                          |                           |               |                                      |               |                                                                    |
| c                                              |                                                          |                           |               |                                      |               |                                                                    |
| d                                              |                                                          |                           |               |                                      |               |                                                                    |
| e                                              |                                                          |                           |               |                                      |               |                                                                    |
| 12                                             | Subtotal. Add columns (b), (d), and (e)                  |                           |               |                                      | 352,123.      |                                                                    |
| 13                                             | <b>Total.</b> Add line 12, columns (b), (d), and (e)     |                           |               |                                      | <b>13</b>     | 352,123.                                                           |

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]



## GORDON ELWOOD FOUNDATION

93-1267972

**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 6A**  
**NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS**  
**ASSETS NOT INCLUDED IN PART IV**

|                      |                       |             |          |
|----------------------|-----------------------|-------------|----------|
| DESCRIPTION:         | DA DAVIDSON 1612 - ST |             |          |
| DATE ACQUIRED:       | VARIOUS               |             |          |
| HOW ACQUIRED:        | PURCHASE              |             |          |
| DATE SOLD:           | VARIOUS               |             |          |
| TO WHOM SOLD:        |                       |             |          |
| GROSS SALES PRICE:   | 40,000.               |             |          |
| COST OR OTHER BASIS: | 39,455.               |             |          |
| BASIS METHOD:        | COST                  |             |          |
|                      |                       | GAIN (LOSS) | 545.     |
| DESCRIPTION:         | DA DAVIDSON 1612 - LT |             |          |
| DATE ACQUIRED:       | VARIOUS               |             |          |
| HOW ACQUIRED:        | PURCHASE              |             |          |
| DATE SOLD:           | VARIOUS               |             |          |
| TO WHOM SOLD:        |                       |             |          |
| GROSS SALES PRICE:   | 391,000.              |             |          |
| COST OR OTHER BASIS: | 409,698.              |             |          |
| BASIS METHOD:        | COST                  |             |          |
|                      |                       | GAIN (LOSS) | -18,698. |
| DESCRIPTION:         | DA DAVIDSON 1650 - LT |             |          |
| DATE ACQUIRED:       | VARIOUS               |             |          |
| HOW ACQUIRED:        | PURCHASE              |             |          |
| DATE SOLD:           | VARIOUS               |             |          |
| TO WHOM SOLD:        |                       |             |          |
| GROSS SALES PRICE:   | 36,000.               |             |          |
| COST OR OTHER BASIS: | 46,127.               |             |          |
| BASIS METHOD:        | COST                  |             |          |
|                      |                       | GAIN (LOSS) | -10,127. |
| DESCRIPTION:         | DA DAVIDSON 1589 - ST |             |          |
| DATE ACQUIRED:       | VARIOUS               |             |          |
| HOW ACQUIRED:        | PURCHASE              |             |          |
| DATE SOLD:           | VARIOUS               |             |          |
| TO WHOM SOLD:        |                       |             |          |
| GROSS SALES PRICE:   | 125,005.              |             |          |
| COST OR OTHER BASIS: | 124,083.              |             |          |
| BASIS METHOD:        | COST                  |             |          |
|                      |                       | GAIN (LOSS) | 922.     |
| DESCRIPTION:         | DA DAVIDSON 1631 - ST |             |          |
| DATE ACQUIRED:       | VARIOUS               |             |          |
| HOW ACQUIRED:        | PURCHASE              |             |          |
| DATE SOLD:           | VARIOUS               |             |          |
| TO WHOM SOLD:        |                       |             |          |
| GROSS SALES PRICE:   | 62,103.               |             |          |
| COST OR OTHER BASIS: | 62,980.               |             |          |
| BASIS METHOD:        | COST                  |             |          |
|                      |                       | GAIN (LOSS) | -877.    |

## GORDON ELWOOD FOUNDATION

93-1267972

STATEMENT 1 (CONTINUED)  
FORM 990-PF, PART I, LINE 6A  
NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS  
ASSETS NOT INCLUDED IN PART IV

|                      |                       |             |         |
|----------------------|-----------------------|-------------|---------|
| DESCRIPTION:         | DA DAVIDSON 1631 - LT |             |         |
| DATE ACQUIRED:       | VARIOUS               |             |         |
| HOW ACQUIRED:        | PURCHASE              |             |         |
| DATE SOLD:           | VARIOUS               |             |         |
| TO WHOM SOLD:        |                       |             |         |
| GROSS SALES PRICE:   | 255,704.              |             |         |
| COST OR OTHER BASIS: | 195,589.              |             |         |
| BASIS METHOD:        | COST                  |             |         |
|                      |                       | GAIN (LOSS) | 60,115. |
| DESCRIPTION:         | DA DAVIDSON 1626 - ST |             |         |
| DATE ACQUIRED:       | VARIOUS               |             |         |
| HOW ACQUIRED:        | PURCHASE              |             |         |
| DATE SOLD:           | VARIOUS               |             |         |
| TO WHOM SOLD:        |                       |             |         |
| GROSS SALES PRICE:   | 139,770.              |             |         |
| COST OR OTHER BASIS: | 149,639.              |             |         |
| BASIS METHOD:        | COST                  |             |         |
|                      |                       | GAIN (LOSS) | -9,869. |
| DESCRIPTION:         | DA DAVIDSON 1626 - LT |             |         |
| DATE ACQUIRED:       | VARIOUS               |             |         |
| HOW ACQUIRED:        | PURCHASE              |             |         |
| DATE SOLD:           | VARIOUS               |             |         |
| TO WHOM SOLD:        |                       |             |         |
| GROSS SALES PRICE:   | 19,530.               |             |         |
| COST OR OTHER BASIS: | 28,385.               |             |         |
| BASIS METHOD:        | COST                  |             |         |
|                      |                       | GAIN (LOSS) | -8,855. |
| DESCRIPTION:         | DA DAVIDSON 1626 - LT |             |         |
| DATE ACQUIRED:       | VARIOUS               |             |         |
| HOW ACQUIRED:        | PURCHASE              |             |         |
| DATE SOLD:           | VARIOUS               |             |         |
| TO WHOM SOLD:        |                       |             |         |
| GROSS SALES PRICE:   | 32.                   |             |         |
| COST OR OTHER BASIS: | 0.                    |             |         |
| BASIS METHOD:        | COST                  |             |         |
|                      |                       | GAIN (LOSS) | 32.     |
| DESCRIPTION:         | DA DAVIDSON 1626 - ST |             |         |
| DATE ACQUIRED:       | VARIOUS               |             |         |
| HOW ACQUIRED:        | PURCHASE              |             |         |
| DATE SOLD:           | VARIOUS               |             |         |
| TO WHOM SOLD:        |                       |             |         |
| GROSS SALES PRICE:   | 1,936.                |             |         |
| COST OR OTHER BASIS: | 1,882.                |             |         |
| BASIS METHOD:        | COST                  |             |         |
|                      |                       | GAIN (LOSS) | 54.     |

## GORDON ELWOOD FOUNDATION

93-1267972

**STATEMENT 1 (CONTINUED)**  
**FORM 990-PF, PART I, LINE 6A**  
**NET GAIN (LOSS) FROM NONINVENTORY SALES PER BOOKS**  
**ASSETS NOT INCLUDED IN PART IV**

|                      |                       |             |                    |
|----------------------|-----------------------|-------------|--------------------|
| DESCRIPTION:         | DA DAVIDSON 1626 - LT |             |                    |
| DATE ACQUIRED:       | VARIOUS               |             |                    |
| HOW ACQUIRED:        | PURCHASE              |             |                    |
| DATE SOLD:           | VARIOUS               |             |                    |
| TO WHOM SOLD:        |                       |             |                    |
| GROSS SALES PRICE:   | 295,954.              |             |                    |
| COST OR OTHER BASIS: | 100,533.              |             |                    |
| BASIS METHOD:        | COST                  |             |                    |
|                      |                       | GAIN (LOSS) | 195,421.           |
|                      |                       | TOTAL       | <u>\$ 208,663.</u> |

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 11**  
**OTHER INCOME**

|               | (A)<br>REVENUE<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME |
|---------------|-----------------------------|---------------------------------|-------------------------------|
| MISCELLANEOUS |                             |                                 |                               |
| TOTAL         | <u>\$ 695.</u>              | <u>\$ 695.</u>                  | <u>\$ 0.</u>                  |

**STATEMENT 3**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

|                 | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|-----------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING FEES |                              |                                 |                               |                               |
| TOTAL           | <u>\$ 1,800.</u>             | <u>\$ 0.</u>                    | <u>\$ 0.</u>                  | <u>\$ 1,800.</u>              |

**STATEMENT 4**  
**FORM 990-PF, PART I, LINE 16C**  
**OTHER PROFESSIONAL FEES**

|                          | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|--------------------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| INVESTMENT MANAGEMENT    | \$ 55,179.                   | \$ 55,179.                      |                               |                               |
| PROPERTY MANAGEMENT FEES | 7,821.                       |                                 |                               | \$ 7,821.                     |
| TOTAL                    | <u>\$ 63,000.</u>            | <u>\$ 55,179.</u>               | <u>\$ 0.</u>                  | <u>\$ 7,821.</u>              |

**STATEMENT 5**  
**FORM 990-PF, PART I, LINE 18**  
**TAXES**

|               | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|---------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| CORPORATE FEE | \$ 50.                       |                                 |                               | \$ 50.                        |
| FEDERAL TAXES | 105.                         |                                 |                               | 105.                          |
| FOREIGN TAXES | 320.                         |                                 |                               | 320.                          |
| PAYROLL TAXES | 9,934.                       |                                 |                               | 9,934.                        |
| STATE TAXES   | 950.                         |                                 |                               | 950.                          |
| <b>TOTAL</b>  | <b>\$ 11,359.</b>            | <b>\$ 0.</b>                    | <b>\$ 0.</b>                  | <b>\$ 11,359.</b>             |

**STATEMENT 6**  
**FORM 990-PF, PART I, LINE 19**  
**ALLOCATED DEPRECIATION**

| DATE<br>ACQUIRED     | COST<br>BASIS | PRIOR YR<br>DEPR | METHOD | RATE | LIFE | CURRENT<br>YR DEPR | NET INVEST<br>INCOME | ADJUSTED<br>NET INCOME |
|----------------------|---------------|------------------|--------|------|------|--------------------|----------------------|------------------------|
| OFFICE BUILDING      |               |                  |        |      |      |                    |                      |                        |
| 12/28/06             | 475,276       | 104,094          | S/L    |      | 39   | 12,187             | 0                    | 0                      |
| DELL INSPIRON LAPTOP |               |                  |        |      |      |                    |                      |                        |
| 11/19/13             | 617           | 185              | S/L    | 0.2  |      | 123                | 0                    | 0                      |
| DELL LAPTOP          |               |                  |        |      |      |                    |                      |                        |
| 8/22/15              | 1,034         |                  | S/L    |      | 5    | 172                | 0                    | 0                      |
| DOCKING STATION      |               |                  |        |      |      |                    |                      |                        |
| 9/24/15              | 275           |                  | S/L    |      | 5    | 41                 | 0                    | 0                      |

**STATEMENT 7**  
**FORM 990-PF, PART I, LINE 23**  
**OTHER EXPENSES**

|                          | (A)<br>EXPENSES<br>PER BOOKS | (B) NET<br>INVESTMENT<br>INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
|--------------------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| BOARD MEETING EXPENSE    | \$ 5,588.                    |                                 |                               | \$ 5,588.                     |
| COMMUNITY DEVELOPMENT    | 7,636.                       |                                 |                               | 7,636.                        |
| CONTRACT SERVICES        | 15,532.                      |                                 |                               | 15,532.                       |
| DUES & SUBSCRIPTIONS     | 2,942.                       |                                 |                               | 2,942.                        |
| EMPLOYEE BENEFITS        | 11,999.                      |                                 |                               | 11,999.                       |
| IN-KIND EXPENSES         | 36,919.                      |                                 |                               | 36,919.                       |
| INSURANCE                | 2,611.                       |                                 |                               | 2,611.                        |
| MISCELLANEOUS            | 132.                         |                                 |                               | 132.                          |
| OFFICE SUPPLIES          | 4,481.                       |                                 |                               | 4,481.                        |
| POSTAGE                  | 155.                         |                                 |                               | 155.                          |
| PROFESSIONAL DEVELOPMENT | 1,330.                       |                                 |                               | 1,330.                        |
| TELECOMMUNICATIONS       | 3,638.                       |                                 |                               | 3,638.                        |
| <b>TOTAL</b>             | <b>\$ 92,963.</b>            | <b>\$ 0.</b>                    | <b>\$ 0.</b>                  | <b>\$ 92,963.</b>             |

## GORDON ELWOOD FOUNDATION

93-1267972

**STATEMENT 8**  
**FORM 990-PF, PART II, LINE 14**  
**LAND, BUILDINGS, AND EQUIPMENT**

| CATEGORY                | BASIS              | ACCUM.<br>DEPREC.  | BOOK<br>VALUE      | FAIR MARKET<br>VALUE |
|-------------------------|--------------------|--------------------|--------------------|----------------------|
| MACHINERY AND EQUIPMENT | \$ 12,073.         | \$ 10,405.         | \$ 1,668.          | \$ 0.                |
| BUILDINGS               | 475,276.           | 116,281.           | 358,995.           | 365,663.             |
| IMPROVEMENTS            | 26,245.            | 21,245.            | 5,000.             | 0.                   |
| <b>TOTAL</b>            | <b>\$ 513,594.</b> | <b>\$ 147,931.</b> | <b>\$ 365,663.</b> | <b>\$ 365,663.</b>   |

**STATEMENT 9**  
**FORM 990-PF, PART III, LINE 5**  
**OTHER DECREASES**

|                                               |  |  |              |                    |
|-----------------------------------------------|--|--|--------------|--------------------|
| NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS |  |  |              |                    |
|                                               |  |  |              | \$ 468,293.        |
|                                               |  |  | <b>TOTAL</b> | <b>\$ 468,293.</b> |

**STATEMENT 10**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

| NAME AND ADDRESS                                                     | TITLE AND<br>AVERAGE HOURS<br>PER WEEK DEVOTED | COMPEN-<br>SATION | CONTRI-<br>BUTION TO<br>EBP & DC | EXPENSE<br>ACCOUNT/<br>OTHER |
|----------------------------------------------------------------------|------------------------------------------------|-------------------|----------------------------------|------------------------------|
| MICHAEL R. HEVERLY<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504 | TRUSTEE<br>2.00                                | \$ 0.             | \$ 0.                            | \$ 0.                        |
| JANET J. MURPHY<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504    | TRUSTEE<br>1.00                                | 0.                | 0.                               | 0.                           |
| KATHY BRYON<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504        | EXECUTIVE DIR.<br>40.00                        | 106,655.          | 0.                               | 0.                           |
| DANIEL KOSMATKA<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504    | TRUSTEE<br>1.00                                | 0.                | 0.                               | 0.                           |
| STEPHANIE JOHNSON<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504  | TRUSTEE<br>1.00                                | 0.                | 0.                               | 0.                           |
| BURKE RAYMOND<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504      | TRUSTEE<br>2.00                                | 0.                | 0.                               | 0.                           |

## GORDON ELWOOD FOUNDATION

93-1267972

**STATEMENT 10 (CONTINUED)**  
**FORM 990-PF, PART VIII, LINE 1**  
**LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES**

| NAME AND ADDRESS                                                 | TITLE AND<br>AVERAGE HOURS<br>PER WEEK DEVOTED | COMPEN-<br>SATION | CONTRI-<br>BUTION TO<br>EBP & DC | EXPENSE<br>ACCOUNT/<br>OTHER |
|------------------------------------------------------------------|------------------------------------------------|-------------------|----------------------------------|------------------------------|
| ANNETTE BATZER<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504 | PRESIDENT<br>2.00                              | \$ 0.             | \$ 0.                            | \$ 0.                        |
| JULIE BEATTIE<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504  | VICE PRESIDENT<br>2.00                         | 0.                | 0.                               | 0.                           |
| STEVE BOYARSKY<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504 | SECRETARY<br>2.00                              | 0.                | 0.                               | 0.                           |
| JOHN DUKE<br>670 SUPERIOR CT. UNIT 108<br>MEDFORD, OR 97504      | TREASURER<br>1.00                              | 0.                | 0.                               | 0.                           |
| TOTAL                                                            |                                                | \$ 106,655.       | \$ 0.                            | \$ 0.                        |

**STATEMENT 11**  
**FORM 990-PF, PART IX-A, LINE 1**  
**SUMMARY OF DIRECT CHARITABLE ACTIVITIES**

| DIRECT CHARITABLE ACTIVITIES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | EXPENSES   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| IN-KIND SUPPORT COVERING OFFICE SPACE, UTILITIES, OFFICES MACHINES, OFFICE SUPPLIES AND CONFERENCE ROOM FOR THREE NON-PROFIT 501C3 TENANTS AND THEIR ASSOCIATED PROJECTS; SEE WEB PAGES FOR SPECIFIC GOALS/OUTCOMES OF THE TENANTS: SMART <a href="http://WWW.GETSMARTOREGON.ORG">WWW.GETSMARTOREGON.ORG</a> ; JACKSON COUNTY LITERACY COUNCIL <a href="http://WWW.ROGUELRC.ORG">WWW.ROGUELRC.ORG</a> ; JEFFERSON REGIONAL HEALTH ALLIANCE <a href="http://WWW.JEFFERSONREGIONALHEALTHALLIANCE.ORG">WWW.JEFFERSONREGIONALHEALTHALLIANCE.ORG</a> (INCLUDING END OF LIFE RESOURCES ON CHOOSING OPTIONS, HONORING OPTIONS <a href="http://WWW.COHOROGUEVALLEY.ORG">WWW.COHOROGUEVALLEY.ORG</a> . AND OREGON PAIN GUIDANCE, FORMERLY THE OPIOID PRESCRIBERS GROUP) <a href="http://WWW.SOUTHERNOREGONOPIOIDMANAGEMENT.ORG">HTTP://WWW.SOUTHERNOREGONOPIOIDMANAGEMENT.ORG</a> | \$ 32,060. |

**STATEMENT 12**  
**FORM 990-PF, PART IX-A, LINE 2**  
**SUMMARY OF DIRECT CHARITABLE ACTIVITIES**

| DIRECT CHARITABLE ACTIVITIES                                                                                                                                                                                                                                                                                                               | EXPENSES    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| COMMUNITY 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. | \$ 136,340. |
| SPECIFIC COMMUNITY COLLABORATIVE INITIATIVES                                                                                                                                                                                                                                                                                               |             |
| I. JEFFERSON E FUNDERS FORUM (JEFF)                                                                                                                                                                                                                                                                                                        |             |
| JEFFERSON FUNDERS FORUM BRINGS TOGETHER PUBLIC AND PRIVATE                                                                                                                                                                                                                                                                                 |             |

**STATEMENT 12 (CONTINUED)**  
**FORM 990-PF, PART IX-A, LINE 2**  
**SUMMARY OF DIRECT CHARITABLE ACTIVITIES**

| DIRECT CHARITABLE ACTIVITIES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | EXPENSES |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <p>PHILANTHROPIC LEADERSHIP TO SHARE INFORMATION, PERSPECTIVES AND EXPERIENCES; COOPERATIVELY EXPLORE AND LEVERAGE RESOURCES TO POSITIVELY IMPACT COMMUNITIES IN SOUTHERN OREGON.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |          |
| <p>II.SOUTHERN OREGON SUCCESS: A PRECONCEPTION -24 YEARS COLLECTIVE IMPACT INITIATIVE<br/> 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<br/> 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.<br/> OUR STRATEGIES: PROMOTE REGIONAL UNDERSTANDING IMPACT OF ADVERSE CHILDHOOD EXPERIENCES ON HEALTH AND EDUCATION AND SHARE TRAUMA INFORMED APPROACHES TO INCREASE HEALTH AND EDUCATIONAL SUCCESS; CREATE &amp; PROMOTE A SHARED REGIONAL AGENDA WITH GOALS THAT ARE COLLABORATIVE, MEASUREABLE, AND ACCOUNTABLE.</p>                                                                                                                                                                                                                                                                                                              |          |
| <p>III.JEFFERSON REGIONAL HEALTH ALLIANCE<br/> 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. JRHA LEADERSHIP SERVES AS A PLATFORM FOR COLLABORATION IN ORDER TO IMPROVE HEALTH AND HEALTH CARE RESOURCES FOR THE REGION. JRHA'S MANY ACTIVITIES AND FAR REACHING INITIATIVES PROMOTE IMPROVEMENTS IN THE HEALTH AND HEALTH CARE RESOURCES FOR SOUTHERN OREGON'S AND NORTHERN CALIFORNIA'S EIGHT COUNTIES, WHICH IS HOME TO APPROXIMATELY 515,000 PEOPLE. SEE <a href="http://WWW.JEFFERSONREGIONALHEALTHALLIANCE.ORG">WWW.JEFFERSONREGIONALHEALTHALLIANCE.ORG</a> SUPPORTING REGIONAL INITIATIVES IN END OF LIFE: <a href="http://WWW.COHOROGUEVALLEY.ORG">WWW.COHOROGUEVALLEY.ORG</a> ; PAIN MANAGEMENT/REDUCTION OF OPIOID OVER PRESCRIBING <a href="http://WWW.SOUTHERNOREGONOPIOIDMANAGEMENT.ORG/">WWW.SOUTHERNOREGONOPIOIDMANAGEMENT.ORG/</a> ; HEALTH INFORMATION EXCHANGE <a href="http://WWW.JHIE.ORG">WWW.JHIE.ORG</a> ; UNDERSTANDING CHILDHOOD VACCINES WORK <a href="http://WWW.ASHLANDCHILD.ORG">WWW.ASHLANDCHILD.ORG</a></p> |          |
| <p>IV.THE URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR TEAM<br/> A COLLABORATION OF INDIVIDUALS AND ORGANIZATIONS THAT PROMOTE A THRIVING URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR THROUGH THE CONVERGENCE OF ART, ENVIRONMENTAL STEWARDSHIP AND RECREATION. WE PROMOTE WALKABILITY, RECREATIONAL USE AND SAFETY OF THE URBAN MEDFORD BEAR CREEK GREENWAY; PROMOTE USE OF MEDFORD PARKS AND THE BEAR CREEK GREENWAY TRAIL TO ENCOURAGE HEALTHY ACTIVITY FOR ROGUE VALLEY COMMUNITY AND VISITORS; IMPROVE ECOLOGICAL HABITAT OF BEAR CREEK INCLUDING RIPARIAN CORRIDOR, WATER QUALITY, FISH, AND WILDLIFE; PROMOTE USE OF ART TO INCREASE THE VITALITY AND LIVABILITY OF THE DOWNTOWN AND URBAN MEDFORD BEAR CREEK GREENWAY CORRIDOR.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                              |          |

## GORDON ELWOOD FOUNDATION

93-1267972

**STATEMENT 13**  
**FORM 990-PF, PART IX-A, LINE 3**  
**SUMMARY OF DIRECT CHARITABLE ACTIVITIES**

| <u>DIRECT CHARITABLE ACTIVITIES</u>                                                                                                                                                                                                                                                                                                          | <u>EXPENSES</u> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| CASH SUPPORT FOR EXPENSE RELATED TO ORGANIZATIONS AND PROJECTS LISTED IN ACTIVITY 1 & 2,<br>EXPENSES INCLUDE: SUPPORTING MEETING EXPENSES WITH COMMUNITY LEADERS AND GROUPS OF LEADERS; AS WELL AS SPEAKERS, EDUCATIONAL AND RESEARCH FEES. PROVIDE SCHOLARSHIPS FOR SELECTED PROJECT LEADERS OR GRANTEEES TO ATTEND TRAININGS AND SEMINARS. | \$ 7,637.       |

**STATEMENT 14**  
**FORM 990-PF, PART XV, LINE 2A-D**  
**APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM: GORDON ELWOOD FOUNDATION  
NAME: KATHY BRYON, EXECUTIVE DIRECTOR  
CARE OF:  
STREET ADDRESS: 670 SUPERIOR CT. UNIT 108  
CITY, STATE, ZIP CODE: MEDFORD, OR 97504  
TELEPHONE: (541) 282-0643  
E-MAIL ADDRESS: OFFICE@ELWOODFOUNDATION.COM  
FORM AND CONTENT: GRANT APPLICATIONS MUST BE RECEIVED ON THE APPLICATION FORM OF THE FOUNDATION. A COPY IS AVAILABLE BY WRITING TO THE ADDRESS ABOVE OR BY VISITING [WWW.GORDONELWOODFOUNDATION.ORG](http://WWW.GORDONELWOODFOUNDATION.ORG)

GRANT DEADLINES ARE MARCH 1 AND SEPTEMBER 1

SUBMISSION DEADLINES:  
RESTRICTIONS ON AWARDS: DISTRIBUTIONS 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

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

| Name and address (home or business)                                                                                   | Purpose of Grant or Contribution                                                                                                                                                                                                      | Amount      |
|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| <i>a: Paid during the year</i>                                                                                        |                                                                                                                                                                                                                                       |             |
| <b>Rogue Valley Family YMCA</b><br>522 West Sixth St , Medford, OR 97501                                              | App 837 8/1/2015 Leadership Training - Sustainable Leadership Consultants - John Bowling, Ph D                                                                                                                                        | \$2,500 00  |
| <b>Women's Crisis Support Team</b><br>560-A NE F St , PMB 430, 560 NE "F" Street,<br>Ste A 430, Grants Pass, OR 97526 | App 844 9/1/2015 Project to help students develop the social and emotional competencies needed to make safe choices and avoid risk behaviors including violence, unhealthy relationships, and substance abuse.                        | \$7,000 00  |
| <b>Family Nurturing Center</b><br>212 N Oakdale Ave, Medford, OR 97501                                                | App 836 9/1/2015 Leadership Training - Sustainable Leadership Consultants - John Bowling, Ph D                                                                                                                                        | \$2,500 00  |
| <b>Kid Time Discovery Experience</b><br>106 N. Central Ave, Medford, OR 97504                                         | App 838 9/1/2015 Leadership Training - Sustainable Leadership Consultants - John Bowling, Ph D                                                                                                                                        | \$2,500 00  |
| <b>Wilderness Trails, Inc</b><br>PO Box 4655, Medford, OR 97501                                                       | App 846 9/15/2015 Funds to support the construction of a \$460,000 (3,000 square foot) kitchen/shower facility to support our tipi village                                                                                            | \$5,000.00  |
| <b>The Ross Ragland Theater</b><br>218 N 7th St , Klamath Falls, OR 97601                                             | App 848 10/1/2015 to return performance arts to their elementary classrooms Year 3, recruitment, training and classroom instruction can begin in the fall of 2015 and continue into 2016 for all county elementary schools            | \$9,528.00  |
| <b>Access</b><br>PO Box 4666, Medford, OR 97501                                                                       | App 850 10/1/2015 he Community Food System Coordinator position that provides staffing support to the Network                                                                                                                         | \$7,000 00  |
| <b>Rogue Farm Corps</b><br>PO Box 533, Ashland, OR 97520                                                              | App 849 10/15/2015 RFC offers entry-level and advanced level on-farm training opportunities across Oregon through its FarmsNext internship program and FarmsNOW apprenticeship program.                                               | \$5,000.00  |
| <b>Wild Rivers Community Foundation</b><br>879 J Street, Suite 1, Crescent City, CA 95531                             | App 856 11/10/2015                                                                                                                                                                                                                    | \$500 00    |
| <b>CASA for Children of Klamath County</b><br>731 Main Street, Suite 202, Klamath Falls, OR 97601                     | App 851 12/1/2015 This requested funding will assist in increasing our total number of children served Funding will further our efforts to build our capacity by supporting staff, recruitment activities and training activities     | \$5,000 00  |
| <b>Rogue Valley Farm to School</b><br>P O Box 898, 100 Eagle Mill Rd , Ashland, OR 97520                              | App 841 12/15/2015 Funds to support 2 FoodCorps servicemembers dedicated to working in 5 school gardens                                                                                                                               | \$5,000 00  |
| <b>Klamath Ice Sports</b><br>1311 Wild Plum Drive, Klamath Falls, OR 97601                                            | App 853 12/15/2015 a series of capital renovations at the Bill Collier Community Ice Arena to reduce energy consumption and expenses, improve facility longevity, improve safety, and improve customer satisfaction and comfort       | \$7,000.00  |
| <b>Rogue Valley Youth for Christ</b><br>529 Edwards Street, 400 Crater Lake Avenue,<br>Medford, OR 97501              | App 845 12/15/2015 Comprehensive mentoring program designed for children from destructive home & family situations                                                                                                                    | \$5,000 00  |
| <b>Rogue Community College District</b><br>3345 Redwood Highway, Grants Pass, OR 97527                                | App: 852 1/1/2016 Funds will be used to help pay for tuition, fees and books for college-level courses to accelerate academic skill acquisition and learning                                                                          | \$10,000.00 |
| <b>Philanthropy Northwest</b><br>2101 Fourth Avenue Suite 650, Seattle, WA 98121                                      | App 896 1/12/2016                                                                                                                                                                                                                     | \$2,500 00  |
| <b>JPR Foundation, Inc.</b><br>1250 Siskiyou Blvd, Ashland, OR 97520                                                  | App. 843 3/1/2016 To partner with the Southern Oregon University Division of Performing Arts to construct a state-of-the-art, 8,000-square-foot JPR studio facility as part of the expansion and renovation of SOU's theatre building | \$5,000 00  |
| <b>Jefferson Regional Health Alliance</b><br>670 Superior Court #208, Medford, OR 97504                               | App 920 3/1/2016                                                                                                                                                                                                                      | \$1,000 00  |
| <b>Oregon Nonprofit Leaders Conference</b><br>c/o United Way of Jackson County, Medford, OR 97504                     | App 921 3/1/2016                                                                                                                                                                                                                      | \$500 00    |
| <b>Ballet Folklorico Ritmo Alegre</b><br>PO Box 795, Talent, OR 97540                                                 | App 893 4/7/2016                                                                                                                                                                                                                      | \$300.00    |
| <b>Consumer Credit Counseling Service</b><br>820 Crater Lake Svc Suite 202, #202, Medford, OR 97504                   | App 892 4/7/2016                                                                                                                                                                                                                      | \$500 00    |

## Part XV Supplementary Information

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

| Name and address (home or business)                                                                                | Purpose of Grant or Contribution                                                                                                                                                                    | Amount           |
|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|
| <b>Lance Reyes</b><br>Medford, OR                                                                                  | App 895 5/17/2016 Sustainable Leadership - led by John Bowling                                                                                                                                      | \$2,700.00       |
| <b>Community Health Center</b><br>19 Myrtle Street, Medford, OR 97504                                              | App 894 5/17/2016 Sustainable Leadership Program - led by John Bowling -                                                                                                                            | \$2,500.00       |
| <b>Wild Rivers Community Foundation</b><br>879 J Street, Suite 1, Crescent City, CA 95531                          | App 890 6/1/2016                                                                                                                                                                                    | \$500.00         |
| <b>Family Nurturing Center</b><br>212 N Oakdale Ave, Medford, OR 97501                                             | App: 882 6/1/2016 Funding to serve as a bridge for FNC to build capacity, increase staff and services in anticipation of being a licensed mental health facility                                    | \$15,000.00      |
| <b>Southern Oregon ESD - fiscal sponsor</b><br>101 N Grape Street, Medford, OR 97501                               | App 881 6/14/2016 Funds to back bone activities including the 2 Project Manager positions                                                                                                           | \$10,000.00      |
| <b>CASA of Curry Co., dba CASA of Douglas</b><br>1000 SE Stephens Street, 29821 Ellensburg Ave, Roseburg, OR 97470 | App. 811 6/14/2016 increase capacity by recruiting and training 5 to 7 more volunteer advocates and 1 to 2 additional peer coordinators. The goal will be to increase the number of children served | \$2,500.00       |
| <b>La Clinica del Valle</b><br>3617 S Pacific Highway, Medford, OR 97501                                           | App: 808 6/14/2016 To meet the unprecedented demand for primary care services La Clinica will open a new site, called La Clinica Wellness Center                                                    | \$5,000.00       |
| <b>Oregon Childrens Foundation dba SMAR</b><br>SMART, 101 SW Market Street, Portland, OR 97201                     | App 865 6/14/2016 General operating support                                                                                                                                                         | \$5,000.00       |
| <b>Heart of Oregon Corps</b><br>PO Box 279, Bend, OR 97709                                                         | App 861 6/14/2016 Request is for matching funds to leverage support from USFS for Oregon Youth Conservation Corp                                                                                    | \$6,000.00       |
| <b>CASA of Jackson County</b><br>613 Market Street, Medford, OR 97504                                              | App 868 6/14/2016 Foster partnerships with local businesses for future recruitment and to increase awareness of child abuse/neglect in community                                                    | \$6,000.00       |
| <b>SOU Pre-College Youth Programs</b><br>1250 Siskiyou Blvd, 1250 Siskiyou Blvd, Ashland, OR 97520                 | App: 878 6/14/2016 Funds to support the Academia Latina Leadership Program for Latino youth completing grades 10 & 11                                                                               | \$7,500.00       |
| <b>Kids Unlimited of Oregon</b><br>821 North Riverside, Medford, OR 97501                                          | App 866 6/14/2016 Funds to support the removal of dilapidated rental houses and build a community meeting space and additional space for KU Charter School                                          | \$5,000.00       |
| <b>Medford First Christian Church</b><br>1900 Crater Lake Ave., Medford, OR 97504                                  | App: 888 6/14/2016 Funds to support the capacity and functionality of Small Steps Preschool, funds will help with improvements to structure and playground.                                         | \$5,000.00       |
| <b>Oregon Lions Sight &amp; Hearing Foundatio</b><br>1010 NW 22nd Avenue, #144, Portland, OR 97210                 | App 883 6/14/2016 Funds to support operation costs for Mobile Health Screening in Klamath & Curry counties                                                                                          | \$5,000.00       |
| <b>Phoenix Elementary School</b><br>215 N Rose Street, P O Box 727, Phoenix, OR 97535                              | App: 884 6/14/2016 10 summer evening session in Spanish for parents and at-risk children to increase pre-kindergartners' reading, math and social skills to succeed in school                       | \$3,032.00       |
| <b>The Southern Oregon Historical Society</b><br>106 N. Central Avenue, Medford, OR 97501                          | App: 855 6/14/2016 Program that teaches children about their history in the setting of a living museum; Historic Hanley Farm which is listed on the National Register of Historic Places            | \$5,000.00       |
| <b>CASA of Curry Co., dba CASA of Douglas</b><br>1000 SE Stephens Street, 29821 Ellensburg Ave, Roseburg, OR 97470 | App: 872 6/14/2016 Capacity Building for Peer Coordinator Model                                                                                                                                     | \$5,000.00       |
| <b>Asante Foundation</b><br>2600 Siskiyou Blvd Ste 100, Medford, OR 97504                                          | App 814 6/14/2016 Funds to assist community resources on a three-year initiative to bring Trauma-informed care to all local providers in the Rogue Valley                                           | \$5,000.00       |
| <b>Children's Advocacy Center of Jackson C</b><br>816 West 10th Street, Medford, OR 97501                          | App 891 6/20/2016                                                                                                                                                                                   | \$500.00         |
| <b>The Neighborhood Food Project</b><br>PO Box 1089, Ashland, OR 97520                                             | App 860 6/30/2016 Pilot Program to recruit families as Neighborhood Coordinators for Medford                                                                                                        | \$5,000.00       |
| <b>Rogue Valley Symphony Association</b><br>1875 Highway 99 N., Suite 7, Ashland, OR 97520                         | App 889 6/30/2016 Link Up music education program, funds will be used to pay musicians who teach the weekly lessons, purchase music instruments all culminating in a concert                        | \$9,000.00       |
| <b>Total: Part XV, Line 3a</b>                                                                                     |                                                                                                                                                                                                     | <b>\$193,560</b> |