

EXTENDED TO APRIL 17, 2018

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.

OMB No 1545-0052

2016

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2016 or tax year beginning

JUN 1, 2016

, and ending

MAY 31, 2017

Name of foundation

WEST FAMILY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)

680 G STREET, SUITE B

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

JACKSONVILLE, OR 97530

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, col (c), line 16)

\$ 8,494,195. (Part I, column (d) must be on cash basis)

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify)

A Employer identification number

20-4720365

B Telephone number

541-899-9976

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))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue

1 Contributions, gifts, grants, etc., received

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

11,709.

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a

2,350,924.

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total Add lines 1 through 11

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees STMT 3

b Accounting fees STMT 4

c Other professional fees STMT 5

17 Interest

18 Taxes STMT 6

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses STMT 7

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid

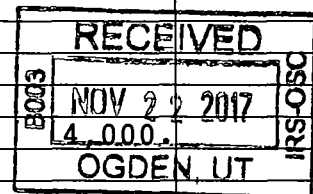
26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

32
21

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	342,702.	246,518.	246,518.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	5,132.	2,975.	2,975.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 9	7,441,761.	7,345,073.	7,909,395.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 10)		260,899.	265,406.	335,307.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)		8,050,494.	7,859,972.	8,494,195.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds ...	8,050,494.	7,859,972.	
30 Total net assets or fund balances ...	8,050,494.	7,859,972.		
31 Total liabilities and net assets/fund balances	8,050,494.	7,859,972.		

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	8,050,494.
2 Enter amount from Part I, line 27a	2	-194,522.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	4,000.
4 Add lines 1, 2, and 3	4	7,859,972.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	7,859,972.

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 2,350,924.		2,293,738.	57,186.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			57,186.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	57,186.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	370,441.	8,137,946.	.045520
2014	444,062.	8,818,848.	.050354
2013	440,085.	8,669,921.	.050760
2012	409,015.	8,187,721.	.049955
2011	418,275.	7,963,463.	.052524

2 Total of line 1, column (d)	2	.249113
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.049823
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	7,913,417.
5 Multiply line 4 by line 3	5	394,270.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,225.
7 Add lines 5 and 6	7	396,495.
8 Enter qualifying distributions from Part XII, line 4 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.	8	417,034.

WEST FAMILY FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHED SCHEDULE 7497-5828	P		
b	SEE ATTACHED SCHEDULE 7497-5809	P		
c	SEE ATTACHED SCHEDULE 8205-9402	P		
d	SEE ATTACHED SCHEDULE 7498-1339	P		
e	SEE ATTACHED SCHEDULE 7088-7924	P		
f	SEE ATTACHED SCHEDULE 3135-9948	P		
g	SEE ATTACHED SCHEDULE 7497-5828	P		
h	SEE ATTACHED SCHEDULE 7497-5814	P		
i	SEE ATTACHED SCHEDULE 7497-5809	P		
j	SEE ATTACHED SCHEDULE 8205-9402	P		
k	SEE ATTACHED SCHEDULE 7498-1339	P		
l	SEE ATTACHED SCHEDULE 7498-1344	P		
m	SEE ATTACHED SCHEDULE 7088-7924	P		
n	SEE ATTACHED SCHEDULE 4854-3930	P		
o	SEE ATTACHED SCHEDULE 3135-9948	P		

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	6,086.	5,659.	427.
b	8,843.	8,569.	274.
c	15,974.	16,205.	-231.
d	1,076.	1,083.	-7.
e	188,536.	190,936.	-2,400.
f	3,193.	2,501.	692.
g	409,945.	430,128.	-20,183.
h	94,548.	65,093.	29,455.
i	535,699.	558,558.	-22,859.
j	18,010.	11,992.	6,018.
k	842,056.	798,546.	43,510.
l	55,500.	57,114.	-1,614.
m	72,600.	74,285.	-1,685.
n	39,308.	26,668.	12,640.
o	54,272.	41,123.	13,149.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			427.
b			274.
c			-231.
d			-7.
e			-2,400.
f			692.
g			-20,183.
h			29,455.
i			-22,859.
j			6,018.
k			43,510.
l			-1,614.
m			-1,685.
n			12,640.
o			13,149.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 } ...

2

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

3

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED SCHEDULE 7088-7924		P		
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,278.		5,278.	0.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			0.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

57,186.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

3

N/A

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,225.
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		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	2,225.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,225.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a 5,200.	7	5,200.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	2,975.
7 Total credits and payments. Add lines 6a through 6d		11	575.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 2,400. Refunded <input checked="" type="checkbox"/>			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> _____ OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.FAMILYFOUNDATIONWEST.ORG</u>	X	
14 The books are in care of ► <u>CARRIE HANSON, EXECUTIVE DIRECTOR</u> Telephone no. ► <u>541-899-9976</u> Located at ► <u>680 G STREET, SUITE B, JACKSONVILLE, OR</u> ZIP+4 ► <u>97530</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	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
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2016 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 2016.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 2016?	4a	X
	4b	X

Form 990-PF (2016)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

6b

X

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

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

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STEVEN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	PRESIDENT 10.00	0.	0.	0.
CAROLYN WEST 680 G STREET, SUITE B JACKSONVILLE, OR 97530	VICE-PRESIDENT 10.00	0.	0.	0.
JASON ANDERSON PO BOX 1667 MEDFORD, OR 97501	SECRETARY/TREASURER 2.00	0.	0.	0.

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

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

Total number of other employees paid over \$50,000

0

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities	1a	7,772,225.
b	Average of monthly cash balances	1b	261,701.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,033,926.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	8,033,926.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	120,509.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,913,417.
6	Minimum investment return. Enter 5% of line 5	6	395,671.

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	395,671.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	2,225.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,225.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	393,446.
4	Recoveries of amounts treated as qualifying distributions	4	4,000.
5	Add lines 3 and 4	5	397,446.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	397,446.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:			
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	417,034.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	417,034.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,225.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	414,809.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				397,446.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			87,846.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 417,034.				
a Applied to 2015, but not more than line 2a			87,846.	
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 2016 distributable amount				329,188.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				68,258.
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 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED STATEMENT	NONE	SEE ATTACHED STATEMENT	SEE ATTACHED STATEMENT	337,047.
Total			▶ 3a	337,047.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	252,252.		
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property	531190	11,709.				
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory			18	57,186.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		11,709.		309,438.		0.
13 Total. Add line 12, columns (b), (d), and (e)					13	321,147.

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

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

[illegible]

STATEMENT S226

Contributions, Gifts, and Grants Paid during the Year
(See Key Issue 221)

Organization: West Family Foundation
TIN: 20-4720365
Tax Year Ended 31-May-17

Form 990-PF, Part XV, Line 3a

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
1	ACCESS P.O. Box 4666 Medford, OR 97501	N/A	Open	Support the purchase of food at the Talent Community Food Pantry	\$ 2,500.00
2	Applegate Valley Fire Protection District 1095 Upper Applegate Rd Jacksonville, OR 97530	N/A	Open	Support the Vehicle Mounted Radio Repeaters Project	\$ 3,600.00
3	Asante Foundation 2600 Siskiyou Blvd Medford, OR 97504	N/A	Open	Support the purchase of a SpinettiX systems for use in the pediatric treatment room	\$ 7,696.00
4	CASA of Jackson County 613 Market Street Medford, OR 97504	N/A	Open	Matching grant in support of the Josephine County Equipment Upgrade project	\$ 2,500.00
5	Chetco Activity Center P.O. Box 1444 Brookings, OR 97415	N/A	Open	Assist with the addition of a 3rd route providing hot meals 5 days a week to 25-30 shut in seniors thru the Meals	\$ 5,000.00
6	County of Jackson Phoenix School Dist. #4 745 N. Rose St Phoenix, OR 97535	N/A	Open	Support the purchase of hurdles for the PHS & TMS track and field program	\$ 3,000.00
7	Crater Foundation PO Box 5172 Central Point, OR 97502	N/A	Open	Support the purchase & installation of a new Scoreboard at the Crater High School Track & Field Complex	\$ 4,000.00
8	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR 97526	N/A	Open	Purchasing riding equipment and therapy games	\$ 2,500.00
9	Friends of Josephine County Food Bank Network PO Box 2363 Grants Pass, OR 97528	N/A	Open	Support the supplemental food project at the Josephine County Food Bank Network	\$ 4,000.00
10	Hearts With A Mission 521 Edwards Medford, OR 97501	N/A	Open	Support the purchase of property located at 529 Edwards Street in Medford.	\$ 50,000.00
11	Hearts With A Mission 521 Edwards Medford, OR 97501	N/A	Open	Purchase, construct and install a new sign at the HWAM/YFC commons campus in Medford	\$ 4,200.00
12	HOPE Equestrian Center PO Box 396 Eagle Point, OR 97524	N/A	Open	Support the Adopt A Rider Fund	\$ 2,500.00
13	Humboldt Area Foundation 879 J St. Crescent City, CA 95531	N/A	Open	Support the Wild Rivers Community Foundation 2016 Holiday Partnership for programs serving Curry County	\$ 2,500.00
14	Jackson County Child Abuse Task Force- CAC 816 W. 10th Street Medford, OR 97501	N/A	Open	General Operating Support	\$ 3,500.00
15	Jackson County Fair Board 1 Peninger Rd Central Point	N/A	Open	Provide sponsorship support so that children under age 12 can attend the 2016 Jackson County Fair free of	\$ 15,000.00
16	Jackson County Fire District 3 8383 Agate Rd White City, OR 97503	N/A	Open	Support the AED Awareness mapping program	\$ 6,000.00

Form 990-PF, Part XV, Line 3a

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
17	Jackson County Fire District 3 8383 Agate Rd White City, OR 97503	N/A	Open	Support the AED Implementation Program	\$ 3,000.00
18	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	N/A	Open	Support the purchase of coats for children at Jackson Elementary	\$ 3,310.56
19	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	N/A	Open	Provide scholarship support for the 2017 Heart of Black and Blue Basketball Scholarship Program	\$ 3,000.00
20	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	N/A	Open	Support the installation of commercial gym flooring in the weight room and the additional equipment needs	\$ 8,000.00
21	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	N/A	Open	Support the sandblasting and painting portion of the Jefferson Elementary Playground project	\$ 7,000.00
22	Jackson County School District 6 300 Ash Street Central Point, OR 97502	N/A	Open	Provide guest speaker funds for Scientist Brent Nixon and the Nature Talks are you listening	\$ 1,953.02
23	Jackson County School District 6 300 Ash Street Central Point, OR 97502	N/A	Open	Support the Creating A Sensory Center project at MRE, Patrick and Sams Valley Elementary	\$ 1,959.00
24	Jackson County School District 6 300 Ash Street Central Point, OR 97502	N/A	Open	Support the Jewett Elementary Makerspace project	\$ 5,000.00
25	Jackson County School District 6 300 Ash Street Central Point, OR 97502	N/A	Open	Support the purchase and installation of a new scoreboard and painting of various buildings at the softball	\$ 7,000.00
26	Jacksonville Community Center PO Box 1435 Jacksonville, OR 97530	N/A	Open	Support the Community Center Expansion project	\$ 8,100.00
27	Joe's Place Ministries PO Box 1226 Grants Pass, OR 97528	N/A	Open	General Operating Support	\$ 5,000.00
28	Joni and Friends- Southern Oregon P O Box 3333 Agoura Hills, CA 91376	N/A	Open	Support the efforts of Southern Oregon Joni & Friends events	\$ 1,000.00
29	Joni and Friends- Southern Oregon P.O Box 3333 Agoura Hills, CA 91376	N/A	Open	Support the Joni & Friends Southern Oregon Family Retreat	\$ 2,000.00
30	Josephine County Foundation (JCF) P.O Box 673 Murphy, OR 97533	N/A	Open	Assist with JCF project in health, education, public safety, & leadership	\$ 3,000.00
31	Kids Unlimited of Oregon 821 North Riverside Medford, OR 97501	N/A	Open	Support the Thanksgiving food basket program	\$ 1,000.00
32	Klamath Community Sports Complex DBA: Steen 4500 Foothills Blvd. Klamath Falls, OR 97603	N/A	Open	to complete the final phase of a three field baseball, t-ball and softball complex at Steen Sports Park	\$ 8,500.00
33	Lumen Dei Church - Rogue Valley Live Nativity 680 G Street, Suite D Jacksonville, OR 97530	N/A	Open	Support the purchase of Molding Cloth for use at The Rogue Valley Live Nativity	\$ 4,620.00
34	Lumen Dei Church - Rogue Valley Live Nativity 680 G Street, Suite D Jacksonville, OR 97530	N/A	Open	Support the purchase of a portable storage container which will be used to store the sets for the nativity	\$ 5,000.00
35	Maslow Project 500 Monroe Street Medford, OR 97501	N/A	Open	General operating support of the Josephine County programs	\$ 7,500.00

Form 990-PF, Part XV, Line 3a

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
36	Medford Police Athletic Assoc P O. Box 914 Medford, OR 97501	N/A	Open	General support of the MPD Explorer Post program	\$ 2,500.00
37	Medical Teams International 14150 SW Milton Court Tigard, OR 97224	N/A	Open	Support of the Southern Oregon Mobile Dental Program	\$ 5,000.00
38	Oasis Shelter Home P O Box 932 Gold Beach, OR 97444	N/A	Open	Support the appliance replacement project	\$ 4,682.00
39	Oregon Assoc of REALTORS Home Foundation PO Box 351 Salem, OR 97308	N/A	Open	Support the 2017 Food & Wine Classic	\$ 5,000.00
40	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR 97201	N/A	Open	Support the South Coast SMART program	\$ 2,000.00
41	Oregon Childrens Foundation (SMART) 101 SW Market St Portland, OR 97201	N/A	Open	Support the Rogue Valley SMART programs	\$ 5,000.00
42	Oregon School Resource Officers Association c/o Medford Police Department Williams, OR 97544	N/A	Open	Provide a maximum of 10 scholarships for officers/educators from Jackson, Josephine, Curry or	\$ 2,250.00
43	Pacific A Garden in the Siskiyou 14615 Water Gap Road Williams, OR 97544	N/A	Open	Support the mobile science nature center, "The Caterpillar"	\$ 3,000.00
44	Peter Britt Gardens Music and Arts Festival P O Box 1124 Medford, OR 97501	N/A	Open	Support the replacement and expansion of the reserved seating area	\$ 10,000.00
45	Quilts of Valor Foundation Box 191 Winterset, IA 50273	N/A	Open	Support the Southern Oregon Chapter Quilts of Valor program	\$ 1,500.00
46	Reaching Our Community (ROC) 564 SW Foundry Grants Pass, OR 97526	N/A	Open	Support the food distribution program	\$ 2,500.00
47	Rebecca Bender Ministries 560 NE F Street Suite A628 Grants Pass, OR 97526	N/A	Open	Support the Change the Culture Kit project	\$ 2,500.00
48	Red Rock Cowboy Church - Hope Ranch PO Box 3788 White City, OR 97503	N/A	Open	Support the finishing & stocking the tack room project	\$ 5,000.00
49	S OR Lions Sight & Hearing Center 228 North Holly Street Medford, OR 97501	N/A	Open	Support the community vision clinics	\$ 2,473.00
50	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR 97530	N/A	Open	Support the Amencorp staffing expenses associated with the youth enhancement program	\$ 8,000.00
51	Shasta Elementary Parent Boosters 1951 Madison St. Klamath Falls, OR 97603	N/A	Open	Support the purchase and installation of a new climbing apparatus at Shasta Elementary	\$ 4,750.00
52	Society of St. Vincent DePaul PO Box 1663 Medford, OR 97501	N/A	Open	Support the back-to-school supplies distribution program	\$ 5,000.00
53	Southern Oregon Music Festival P O Box 1830 Jacksonville, OR 97530	N/A	Open	Support the repair and restoration of donated instruments that will be distributed to youth in Jackson &	\$ 5,000.00

Form 990-PF, Part XV, Line 3a

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and Address (home or business)					
54	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR 97504	N/A	Open	Support the Sparrow program in underfunded schools.	\$ 4,060 00
55	Spartan Boxing Club 729 Welch St. Medford, OR 97501	N/A	Open	Support the purchase of a van	\$ 8,127 00
56	St Mark's Episcopal Church 426 W. 6th Street Medford, OR 97501	N/A	Open	Support the St Marks Food Pantry	\$ 2,500 00
57	Team Overland 42 S. Bameburg Rd Medford, OR 97504	N/A	Open	Support Veterans outdoor healing adventures	\$ 5,000 00
58	Team Overland 42 S. Bameburg Rd Medford, OR 97504	N/A	Open	Support the veteran outdoor adventures	\$ 5,000 00
59	Toucan Rescue Ranch 5974 Shadow Park Drive Reno, NV 89523	N/A	Open	Support the purchase and installation of cages for toucans, sloths, and other rescued animals that are in the care of	\$ 2,000 00
60	United Way of Jackson County 1457 East McAndrews Road Medford, OR 97504	N/A	Open	Support the 2017 Oregon Nonprofit Leaders Conference	\$ 1,500 00
61	Wilderness Trails, Inc PO Box 4655 Medford, OR 97501	N/A	Open	Support the 2017 summer camp sponsorship	\$ 4,000 00
62	Wildlife Images Rehabilitation & Education Center P O 36 Merlin, OR 97532	N/A	Open	Support the Eagle Flight Habitat and Exhibit	\$ 15,000 00
63	Wilson Elementary PTO 1400 Johnson Street Medford, OR 97504	N/A	Open	Support the purchase of the speedboat apparatus on the Wilson Elementary Playground	\$ 6,766.00
64	YMCA- Rogue Valley Family 522 West Sixth Street Medford, OR 97501	N/A	Open	Support the YMCA sneakers for kids project	\$ 2,500 00
TOTAL PAID DURING THIS YEAR					\$ 337,046 58

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
 (See Key Issue 26G)

Organization: West Family Foundation
 TIN: 20-4720365
 Tax Year Ended: 31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec 4945 (h)(3) and Reg 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
1	ACCESS P.O. Box 4686 Medford, OR 97501	\$ 2,500.00	05/17/2017	Support the purchase of food at the Talent Community Food Pantry		No		
2	Applegate Valley Fire Protection District 1095 Upper Applegate Rd. Jacksonville, OR 97530	\$ 3,600.00	05/17/2017	Support the Vehicle Mounted Radio Repeaters Project		No		
3	Asante Foundation 2600 Siskiyou Blvd. Medford, OR 97504	\$ 7,686.00	05/17/2017	Support the purchase of a SpinettiX systems for use in the pediatric treatment room		No		
4	CASA of Jackson County 613 Market Street Medford, OR 97504	\$ 2,500.00	12/5/2016	Matching grant in support of the Josephine County Equipment Upgrade project		No		
5	Chetco Activity Center P.O. Box 1444 Brookings, OR 97415	\$ 5,000.00	10/03/2016	Assist with the addition of a 3rd route providing hot meals 5 days a week to 25-30 shut in seniors thru the Meals		No		
6	County of Jackson Phoenix School Dist. #4 745 N. Rose St. Phoenix, OR 97535	\$ 3,000.00	05/19/2017	Support the purchase of hurdles for the PHS & TMS track and field program		No		
7	Crater Foundation PO Box 5172 Central Point, OR 97502	\$ 4,000.00	06/14/2016	Support the purchase & Installation of a new Scoreboard at the Crater High School Track & Field Complex		No		
8	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR 97526	\$ 2,500.00	05/19/2017	Purchase riding equipment and therapy games		No		
9	Friends of Josephine County Food Bank PO Box 2363 Grants Pass, OR 97528	\$ 4,000.00	05/19/2017	Support the supplemental food project at the Josephine County Food Bank Network		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
(See Key Issue 26G)

Organization	West Family Foundation
TIN	20-4720365
Tax Year Ended	31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec. 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants.

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
10	Hearts With A Mission 521 Edwards Medford, OR 97501	\$ 50,000 00	7/27/2016	Support the purchase of property located at 529 Edwards Street in Medford		No		
11	Hearts With A Mission 521 Edwards Medford, OR 97501	\$ 4,200 00	12/13/2016	Purchase, construct and install a new sign at the HWAM/YFC commons campus in Medford		No		
12	HOPE Equestrian Center PO Box 396 Eagle Point, OR 97524	\$ 2,500 00	05/19/2017	Support the Adopt A Rider Fund		No		
13	Humboldt Area Foundation 879 J St. Crescent City, CA 95531	\$ 2,500 00	11/01/2016	Support the Wild Rivers Community Foundation 2016 Holiday Partnership for programs serving Curry County		No		
14	Jackson County Child Abuse Task Force- CAC 816 W. 10th Street Medford, OR 97501	\$ 3,500 00	05/19/2017	General Operating Support		No		
15	Jackson County Fair Board 1 Peninger Rd Central Point	\$ 15,000 00	06/14/2016	Provide sponsorship support so that children under age 12 can attend the 2016 Jackson County Fair free of		No		
16	Jackson County Fire District 3 8383 Agate Rd White City, OR 97503	\$ 6,000 00	10/03/2016	Support the AED Awareness mapping program		No		
17	Jackson County Fire District 3 8383 Agate Rd White City, OR 97503	\$ 3,000 00	05/19/2017	Support the AED Implementation Program		No		
18	Jackson County School District 549C 815 S. Oakdale Medford, OR 97501	\$ 3,310 56	11/11/2016	Support the purchase of coats for children at Jackson Elementary		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
(See Key Issue 26G)

Organization West Family Foundation
TIN: 20-4720365
Tax Year Ended 31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants.

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
19	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	\$ 3,000 00	03/14/2017	Provide scholarship support for the 2017 Heart of Black and Blue Basketball Scholarship Program		No		
20	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	\$ 8,000 00	05/19/2017	Support the installation of commercial gym flooring in the weight room and the additional equipment needs		No		
21	Jackson County School District 549C 815 S Oakdale Medford, OR 97501	\$ 7,000 00	05/19/2017	Support the sandblasting and painting portion of the Jefferson Elementary Playground project		No		
22	Jackson County School District 6 300 Ash Street Central Point, OR 97502	\$ 1,953 02	03/08/2017	Provide guest speaker funds for Scientist Brent Nixon and the Nature Talks are you listening		No		
23	Jackson County School District 6 300 Ash Street Central Point, OR 97502	\$ 1,959 00	05/19/2017	Support the Creating A Sensory Center project at MRE, Patnick and Sams Valley Elementary		No		
24	Jackson County School District 6 300 Ash Street Central Point, OR 97502	\$ 5,000 00	05/19/2017	Support the Jewett Elementary Makerspace project		No		
25	Jackson County School District 6 300 Ash Street Central Point, OR 97502	\$ 7,000 00	05/19/2017	Support the purchase and installation of a new scoreboard and painting of various buildings at the softball		No		
26	Jacksonville Community Center PO Box 1435 Jacksonville, OR 97530	\$ 8,100 00	05/19/2017	Support the Community Center Expansion project		No		
27	Joe's Place Ministries PO Box 1228 Grants Pass, OR 97528	\$ 5,000 00	05/19/2017	General Operating Support		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
(See Key Issue 26G)

Organization: West Family Foundation
TIN: 20-4720365
Tax Year Ended: 31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec. 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants.

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
28	Joni and Friends- Southern Oregon P.O. Box 3333 Agoura Hills, CA 91376	\$ 1,000.00	10/03/2016	Support the efforts of Southern Oregon Joni & Friends events		No		
29	Joni and Friends- Southern Oregon P.O. Box 3333 Agoura Hills, CA 91376	\$ 2,000.00	05/19/2017	Support the Joni & Friends Southern Oregon Family Retreat		No		
30	Josephine County Foundation (JCF) P.O. Box 673 Murphy, OR 97533	\$ 3,000.00	10/03/2016	Assist with JCF project in health, education, public safety, & leadership.		No		
31	Kids Unlimited of Oregon 821 North Riverside Medford, OR 97501	\$ 1,000.00	10/13/2016	Support the Thanksgiving food basket program		No		
32	Klamath Community Sports Complex DBA 4500 Foothills Blvd. Klamath Falls, OR 97603	\$ 8,500.00	05/19/2017	to complete the final phase of a three field baseball, t-ball and softball complex at Steen Sports Park		No		
33	Lumen Del Church - Rogue Valley Live Nativity 680 G Street, Suite D Jacksonville, OR 97530	\$ 4,620.00	10/03/2016	Support the purchase of Molding Cloth for use at The Rogue Valley Live Nativity		No		
34	Lumen Del Church - Rogue Valley Live Nativity 680 G Street, Suite D Jacksonville, OR 97530	\$ 5,000.00	05/19/2017	Support the purchase of a portable storage container which will be used to store the sets for the nativity		No		
35	Maslow Project 500 Monroe Street Medford, OR 97501	\$ 7,500.00	05/19/2017	General operating support of the Josephine County programs		No		
36	Medford Police Athletic Assoc P.O. Box 914 Medford, OR 97501	\$ 2,500.00	02/13/2017	General support of the MPD Explorer Post program		No		
37	Medical Teams International 14150 SW Milton Court Tigard, OR 97224	\$ 5,000.00	05/19/2017	Support of the Southern Oregon Mobile Dental Program		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
 (See Key Issue 26G)

Organization	West Family Foundation
TIN	20-4720365
Tax Year Ended	31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec 4945 (h)(3) and Reg 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants.

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
38	Oasis Shelter Home P O Box 932 Gold Beach, OR 97444	\$ 4,682.00	05/19/2017	Support the appliance replacement project		No		
39	Oregon Assoc of REALTORS Home PO Box 351 Salem, OR 97308	\$ 5,000.00	03/01/2017	Support the 2017 Food & Wine Classic		No		
40	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR 97201	\$ 2,000.00	05/19/2017	Support the South Coast SMART program		No		
41	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR 97201	\$ 5,000.00	05/19/2017	Support the Rogue Valley SMART programs		No		
42	Oregon School Resource Officers Association c/o Medford Police Department Williams, OR 97544	\$ 2,250.00	05/19/2017	Provide a maximum of 10 scholarships for officers/educators from Jackson, Josephine, Curry or		No		
43	Pacific: A Garden in the Siskiyou 14615 Water Gap Road Williams, OR 97544	\$ 3,000.00	05/19/2017	Support the mobile science nature center, "The Caterpillar"		No		
44	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Medford, OR 97501	\$ 10,000.00	05/19/2017	Support the replacement and expansion of the reserved seating area		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
 (See Key Issue 26G)

Organization	West Family Foundation
TIN	20-4720365
Tax Year Ended	31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants

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45	Quilts of Valor Foundation Box 191 Winterset, IA 50273	\$ 1,500.00	05/19/2017	Support the Southern Oregon Chapter Quilts of Valor program		No		
46	Reaching Our Community (ROC) 564 SW Foundry Grants Pass, OR 97526	\$ 2,500.00	05/19/2017	Support the food distribution program		No		
47	Rebecca Bender Ministries 560 NE F Street Suite A628 Grants Pass, OR 97526	\$ 2,500.00	6/21/2016	Support the Change the Culture Kit project		No		
48	Red Rock Cowboy Church - Hope Ranch PO Box 3788 White City, OR 97503	\$ 5,000.00	05/19/2017	Support the finishing & stocking the tack room project		No		
49	S. OR Lions Sight & Hearing Center 228 North Holly Street Medford, OR 97501	\$ 2,473.00	05/19/2017	Support the community vision clinics		No		
50	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR 97530	\$ 8,000.00	05/19/2017	Support the Americorp staffing expenses associated with the youth enhancement program		No		
51	Shasta Elementary Parent Boosters 1951 Madison St. Klamath Falls, OR 97603	\$ 4,750.00	05/19/2017	Support the purchase and installation of a new climbing apparatus at Shasta Elementary		No		
52	Society of St Vincent DePaul PO Box 1663 Medford, OR 97501	\$ 5,000.00	05/19/2017	Support the back-to-school supplies distribution program		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
 (See Key Issue 26G)

Organization West Family Foundation
 TIN 20-4720365
 Tax Year Ended 31-May-17

Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec. 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
53	Southern Oregon Music Festival P.O. Box 1830 Jacksonville, OR 97530	\$ 5,000.00	10/03/2016	Support the repair and restoration of donated instruments that will be distributed to youth in Jackson & Sparrow programs		No		
54	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR 97504	\$ 4,060.00	10/03/2016	Support the Sparrow program in underfunded schools		No		
55	Spartan Boxing Club 729 Welch St. Medford, OR 97501	\$ 8,127.00	05/19/2017	Support the purchase of a van		No		
56	St. Mark's Episcopal Church 426 W. 6th Street Medford, OR 97501	\$ 2,500.00	05/19/2017	Support the St. Marks Food Pantry		No		
57	Team Overland 42 S. Barneburg Rd Medford, OR 97504	\$ 5,000.00	10/03/2016	Support Veterans outdoor healing adventures		No		
58	Team Overland 42 S. Barneburg Rd Medford, OR 97504	\$ 5,000.00	05/19/2017	Support the veteran outdoor adventures		No		
59	Toucan Rescue Ranch 5974 Shadow Park Drive Reno, NV 89523	\$ 2,000.00	10/20/2016	Support the purchase and installation of cages for toucans, sloths, and other rescued animals that are in the		No		
60	United Way of Jackson County 1457 East McAndrews Road Medford, OR 97504	\$ 1,500.00	10/03/2016	Support the 2017 Oregon Nonprofit Leaders Conference		No		

STATEMENT S219
Substantiation of Exercise of Expenditure Responsibility
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Organization	West Family Foundation
TIN	20-4720365
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Form 990-PF, Part VII-B, Line 5

The following information is provided in accordance with IRC Sec. 4945 (h)(3) and Reg. 53.4945-5(d) to demonstrate that the foundation exercised fiscal responsibility in regard to its grants

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
61	Wilderness Trails, Inc PO Box 4655 Medford, OR 97501	\$ 4,000.00	05/19/2017	Support the 2017 summer camp sponsorship		No		
62	Wildlife Images Rehabilitation & Education P.O. 38 Merlin, OR 97532	\$ 15,000.00	05/19/2017	Support the Eagle Flight Habitat and Exhibit		No		
63	Wilson Elementary PTO 1400 Johnson Street Medford, OR 97504	\$ 6,766.00	05/19/2017	Support the purchase of the speedboat apparatus on the Wilson Elementary Playground		No		
64	YMCA- Rogue Valley Family 522 West Sixth Street Medford, OR 97501	\$ 2,500.00	05/19/2017	Support the YMCA sneakers for kids project		No		
TOTAL PAID DURING THIS YEAR		\$ 337,046.58						

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DA DAVIDSON	252,252.	0.	252,252.	252,252.	
TO PART I, LINE 4	252,252.	0.	252,252.	252,252.	

FORM 990-PF	RENTAL INCOME	STATEMENT	2
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KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL - JACKSONVILLE OR	1	11,709.
TOTAL TO FORM 990-PF, PART I, LINE 5A		11,709.

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,470.	0.		1,470.
TO FM 990-PF, PG 1, LN 16A	1,470.	0.		1,470.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,725.	0.		4,725.
PAYROLL SERVICE	432.	0.		432.
TO FORM 990-PF, PG 1, LN 16B	5,157.	0.		5,157.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	97,443.	97,443.		0.
TO FORM 990-PF, PG 1, LN 16C	97,443.	97,443.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	3,599.	0.		3,599.
STATE TAX	905.	0.		905.
FEDERAL TAXES	1,750.	0.		1,750.
FOREIGN TAXES	1,192.	1,192.		0.
TAXES & LICENSES	50.	0.		50.
TO FORM 990-PF, PG 1, LN 18	7,496.	1,192.		6,304.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	941.	0.		941.
INSURANCE	1,265.	0.		1,265.
MISCELLANEOUS	53.	4.		53.
OFFICE EXPENSE	154.	0.		154.
PUBLIC RELATIONS	1,572.	0.		1,572.
UTILITIES	1,987.	0.		1,987.
SUPPLIES	668.	0.		668.
TRAINING	548.	0.		548.
BUILDING REPAIRS & MAINTENANCE	1,798.	0.		1,798.
AUTO EXPENSE	251.	0.		251.
SOFTWARE LEASE	5,500.	0.		5,500.
TO FORM 990-PF, PG 1, LN 23	14,737.	4.		14,737.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
RECOVERIES OF QUALIFYING DISTRIBUTIONS IN PRIOR TAX YEARS	4,000.
TOTAL TO FORM 990-PF, PART III, LINE 3	4,000.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES - EQUITIES	2,273,718.	2,544,668.
SECURITIES - MUTUAL FUNDS	5,071,355.	5,364,727.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,345,073.	7,909,395.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CWF PROPERTIES	226,157.	227,866.	297,767.
DUE FROM CHANEY FOUNDATION	34,742.	37,540.	37,540.
TO FORM 990-PF, PART II, LINE 15	260,899.	265,406.	335,307.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	11
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NAME OF MANAGER

STEVEN WEST
CAROLYN WEST

FORM 990-PF

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

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

541-899-9976

EMAIL ADDRESS

CHANSON.FAMILYFOUNDATION@GMAIL.COM

FORM AND CONTENT OF APPLICATIONS

INTERNET APPLICATION FORM FOUND ON WEBSITE
WWW.FAMILYFOUNDATIONWEST.ORG

ANY SUBMISSION DEADLINES

THE LAST BUSINESS DAY IN FEBRUARY AND AUGUST

RESTRICTIONS AND LIMITATIONS ON AWARDS

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

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