

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.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning

JUN 1, 2017

and ending

MAY 31, 2018

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)

\$ 8,997,503.

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

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)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		311,504.	311,504.		STATEMENT 1
5a Gross rents		12,844.	12,844.		STATEMENT 2
b Net rental income or (loss) 12,844.					
6a Net gain or (loss) from sale of assets not on line 10		110,079.			
b Gross sales price for all assets on line 6a 2,391,367.					
7 Capital gain net income (from Part IV, line 2)			110,079.		
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		434,427.	434,427.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages		45,833.	0.		45,833.
15 Pension plans, employee benefits		1,867.	0.		1,867.
16a Legal fees STMT 3		1,378.	0.		1,378.
b Accounting fees STMT 4		5,390.	0.		5,390.
c Other professional fees STMT 5		104,544.	104,544.		0.
17 Interest					
18 Taxes STMT 6		8,581.	1,425.		7,138.
19 Depreciation and depletion					
20 Occupancy		6,600.	0.		6,600.
21 Travel, conferences, and meetings		450.	0.		450.
22 Printing and publications					
23 Other expenses STMT 7		6,541.	0.		6,541.
24 Total operating and administrative expenses. Add lines 13 through 23		181,184.	105,969.		75,197.
25 Contributions, gifts, grants paid		353,916.			353,916.
26 Total expenses and disbursements Add lines 24 and 25		535,100.	105,969.		429,113.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-100,673.			
b Net investment income (if negative, enter -0-)			328,458.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	246,518.	156,473.	156,473.
	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	2,975.		
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	7,345,073.	7,336,219.	8,528,771.
	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 9 )	265,406.	266,607.	312,259.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	7,859,972.	7,759,299.	8,997,503.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	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.	
	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	7,859,972.	7,759,299.	
	30 Total net assets or fund balances	7,859,972.	7,759,299.	
	31 Total liabilities and net assets/fund balances	7,859,972.	7,759,299.	

## 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	7,859,972.
2 Enter amount from Part I, line 27a	2	-100,673.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,759,299.
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	7,759,299.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, 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 STATEMENT			
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 2,391,367.		2,281,288.	110,079.

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

(i) FMV 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			110,079.

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 } 2 110,079.

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 doesn't 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))
2016	414,809.	7,913,417.	.052418
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

2 Total of line 1, column (d) 2 .249007

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years 3 .049801

4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5 4 8,734,433.

5 Multiply line 4 by line 3 5 434,983.

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 3,285.

7 Add lines 5 and 6 7 438,268.

8 Enter qualifying distributions from Part XII, line 4 8 429,113.

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 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 5814	P		
b	SEE ATTACHED SCHEDULE 5809	P		
c	SEE ATTACHED SCHEDULE 9402	P		
d	SEE ATTACHED SCHEDULE 1344	P		
e	SEE ATTACHED SCHEDULE 7924	P		
f	SEE ATTACHED SCHEDULE 9948	P		
g	SEE ATTACHED SCHEDULE 5814	P		
h	SEE ATTACHED SCHEDULE 5809	P		
i	SEE ATTACHED SCHEDULE 9402	P		
j	SEE ATTACHED SCHEDULE 1339	P		
k	SEE ATTACHED SCHEDULE 1344	P		
l	SEE ATTACHED SCHEDULE, 7924	P		
m	SEE ATTACHED SCHEDULE 9948	P		
n	SEE ATTACHED SCHEDULE 5809	P		
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	46,167.	49,454.	-3,287.
b	141,794.	143,117.	-1,323.
c	12,070.	24,457.	-12,387.
d	29,302.	29,060.	242.
e	480,219.	462,213.	18,006.
f	11,862.	10,600.	1,262.
g	477,283.	398,753.	78,530.
h	126,768.	129,911.	-3,143.
i	24,696.	25,804.	-1,108.
j	63,112.	52,882.	10,230.
k	691,672.	711,704.	-20,032.
l	199,242.	169,942.	29,300.
m	84,488.	70,699.	13,789.
n	2,692.	2,692.	0.
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-3,287.
b			-1,323.
c			-12,387.
d			242.
e			18,006.
f			1,262.
g			78,530.
h			-3,143.
i			-1,108.
j			10,230.
k			-20,032.
l			29,300.
m			13,789.
n			0.
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	110,079.
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	6,569.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).		3	6,569.
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	6,569.
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 2017 estimated tax payments and 2016 overpayment credited to 2017	6a 2,400.	7	2,400.
b Exempt foreign organizations - tax withheld at source	6b 0.	8	0.
c Tax paid with application for extension of time to file (Form 8868)	6c 0.	9	4,169.
d Backup withholding erroneously withheld	6d 0.	10	
7 Total credits and payments. Add lines 6a through 6d		11	
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 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the 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. <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> 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 2017 or the tax year beginning in 2017? See the 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

**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 2017, 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	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 2017?	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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2017 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 2017.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	X

**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, and 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

Form 990-PF (2017)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

C

## Expenses

2

3

4

Amount

2

3

0.



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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	8,597,058.
b	Average of monthly cash balances	1b	270,387.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,867,445.
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	8,867,445.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	133,012.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,734,433.
6	Minimum investment return. Enter 5% of line 5	6	436,722.

**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	436,722.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	6,569.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6,569.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	430,153.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	430,153.
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	430,153.

**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	429,113.
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	429,113.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	429,113.

**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 2016	(c) 2016	(d) 2017
<b>1</b> Distributable amount for 2017 from Part XI, line 7				430,153.
<b>2</b> Undistributed income, if any, as of the end of 2017				
<b>a</b> Enter amount for 2016 only			68,258.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2017:				
<b>a</b> From 2012				
<b>b</b> From 2013				
<b>c</b> From 2014				
<b>d</b> From 2015				
<b>e</b> From 2016				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 429,113.				
<b>a</b> Applied to 2016, but not more than line 2a			68,258.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2017 distributable amount				360,855.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				69,298.
<b>7</b> 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.			
<b>8</b> Excess distributions carryover from 2012 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2013				
<b>b</b> Excess from 2014				
<b>c</b> Excess from 2015				
<b>d</b> Excess from 2016				
<b>e</b> Excess from 2017				



**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
<b>a</b> Paid during the year				
SEE ATTACHED STATEMENT	NONE	SEE ATTACHED STATEMENT	SEE ATTACHED STATEMENT	353,916.
<b>Total</b>			<b>3a</b>	353,916.
<b>b</b> Approved for future payment				
NONE				
<b>Total</b>			<b>3b</b>	0.



**Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

- |   |  | Yes   | No |
|---|--|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?   |       |    |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of:   |       |    |
|   | (1) Cash   | 1a(1) | X  |
|   | (2) Other assets   | 1a(2) | X  |
| b | Other transactions:  |       |    |
|   | (1) Sales of assets to a noncharitable exempt organization   | 1b(1) | X  |
|   | (2) Purchases of assets from a noncharitable exempt organization   | 1b(2) | X  |
|   | (3) Rental of facilities, equipment, or other assets   | 1b(3) | X  |
|   | (4) Reimbursement arrangements   | 1b(4) | X  |
|   | (5) Loans or loan guarantees   | 1b(5) | X  |
|   | (6) Performance of services or membership or fundraising solicitations   | 1b(6) | X  |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | 1c    | X  |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |       |    |

[illegible]

- 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

7-19-18  
Date

**Vice**  
**PRESIDENT**

May the IRS discuss this return with the preparer shown below? See instr


☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

DAVID P. HYATT, CPA

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

Preparer's signature:   
CPA, PC

Date \_\_\_\_\_

76.48

Check ☐  
self-employed

PTIN
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P00883351

Firm's name ► DAVID P HYATT CPA, PC

Firm's EIN ▶ 26-1932063

Firm's address ► 3551 E BARNETT ROAD, SUITE #105  
MEDFORD, OR 97504

Phone no. (541) 773-9407

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DA DAVIDSON	311,504.	0.	311,504.	311,504.	
TO PART I, LINE 4	311,504.	0.	311,504.	311,504.	

FORM 990-PF RENTAL INCOME STATEMENT 2

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL - JACKSONVILLE OR	1	12,844.
TOTAL TO FORM 990-PF, PART I, LINE 5A		12,844.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,378.	0.		1,378.
TO FM 990-PF, PG 1, LN 16A	1,378.	0.		1,378.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,960.	0.		4,960.
PAYROLL SERVICE	430.	0.		430.
TO FORM 990-PF, PG 1, LN 16B	5,390.	0.		5,390.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	104,544.	104,544.		0.
TO FORM 990-PF, PG 1, LN 16C	104,544.	104,544.		0.

FORM 990-PF TAXES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	3,702.	0.		3,702.
STATE TAX	986.	0.		968.
FEDERAL TAXES	2,468.	0.		2,468.
FOREIGN TAXES	1,425.	1,425.		0.
TO FORM 990-PF, PG 1, LN 18	8,581.	1,425.		7,138.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES AND SUBSCRIPTIONS	600.	0.		600.
INSURANCE	1,253.	0.		1,253.
MISCELLANEOUS	70.	0.		70.
OFFICE EXPENSE	166.	0.		166.
UTILITIES	1,961.	0.		1,961.
SUPPLIES	934.	0.		934.
BUILDING REPAIRS & MAINTENANCE	1,557.	0.		1,557.
TO FORM 990-PF, PG 1, LN 23	6,541.	0.		6,541.



FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES - EQUITIES	2,135,150.	2,941,431.
SECURITIES - MUTUAL FUNDS	5,201,069.	5,587,340.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,336,219.	8,528,771.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CWF PROPERTIES	227,866.	225,710.	271,362.
DUE FROM CHANEY FOUNDATION	37,540.	40,897.	40,897.
TO FORM 990-PF, PART II, LINE 15	265,406.	266,607.	312,259.

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

STEVEN WEST  
CAROLYN WEST

FORM 990-PF

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

STATEMENT 11

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

541-899-9976

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.

# 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-18

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	Addictions Recovery Center (ARC) 1003 E. Main St. Suite 104 Medford, OR	N/A	PC	Support the Reddy House residential treatment for new moms project	\$ 4,000.00
2	American Sewing Guild, S O. Chapter 2250 Crater Lake Ave. #8 Medford, OR	N/A	PC	Support the community service programs	\$ 2,236 00
3	Applegate Valley Fire Protection District 1095 Upper Applegate Rd Jacksonville, OR	N/A	Gov	Support the Mountain Top Radio Repeater project	\$ 5,000.00
4	Boys & Girls Clubs of the Rogue Valley 203 SE 9th Street Grants Pass, OR	N/A	PC	Support the teen training programs at the club Teen Center's	\$ 4,000 00
5	Calvary Church, Jacksonville P.O. Box 117 Jacksonville, OR	N/A	Church	Support facility repairs and maintenance	\$ 2,500 00
6	Camp Millennium 2726 Diamond Lake Blvd Roseburg, OR	N/A	PC	Sponsorship of campers dealing with a cancer diagnosis to attend the 2018 summer camp	\$ 4,000 00
7	CASA of Klamath County 731 Main Street, Suite 202 Klamath Falls, OR	N/A	PC	Support the purchase of five I-pads	\$ 3,000.00
8	City of Brookings 898 Elk Drive Brookings, OR	N/A	Gov	Matching grant in support of the Kidtown playground renovation project	\$ 5,000.00
9	County of Jackson Phoenix School Dist. #4 745 N Rose St Phoenix, OR	N/A	Gov	Phoenix Elementary - Growing Kids Through Gardening	\$ 2,000 00
10	Crater Foundation PO Box 5172 Central Point, OR	N/A	PC	Support the purchase & installation of a new Scoreboard at the Crater High School Track & Field Complex	\$ 4,000.00
11	Crescent Rural Fire Protection District 150 Mountain View Dr Gilchrist, OR	N/A	Gov	Purchase structural fire helmets	\$ 1,700.00
12	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR	N/A	PC	Support the purchase of rubber footing for the arena	\$ 4,000 00
13	Divide Camp, Inc. PO Box 49 Joseph, OR	N/A	PC	Healing wounded veterans through wilderness adventures	\$ 6,000.00
14	Evans Valley Fire District #6 8677 East Evans Creek Road Rogue River, OR	N/A	Gov	Support the purchase of a "Jaws of Life" vehicle extrication tool	\$ 6,500.00
15	Favell Museum, Inc 125 West Main Street Klamath Falls, OR	N/A	PC	Support the visual art education project	\$ 4,000.00

## 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
16	Friends of the Children of the Klamath Basin 3837 Altamont Drive Klamath Falls, OR	N/A	PC	Roof replacement and addition of an air conditioning unit	\$ 6,000.00
17	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	N/A	PC	Support the Dove Street development project	\$ 5,000 00
18	Hearts With A Mission 521 Edwards Medford, OR	N/A	PC	Support the purchase of property	\$ 50,000.00
19	Integral Youth Services (IYS) PO Box 1385 Klamath Falls, OR	N/A	PC	Support the Exodus House HVAC and security system upgrade and replacement project	\$ 7,378.00
20	Jackson County 4-H Association (aka Oregon 4H) 569 Hanley Road Central Point, OR	N/A	PC	To purchase permanent livestock supplies for Antelope Beef 4-H Club	\$ 4,909.00
21	Jackson County Fair Board 1 Peninger Rd Central Point, OR	N/A	Gov	Provide sponsorship support so that children under age 12 can attend the 2017 Jackson County Fair free of	\$ 15,000 00
22	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Provide scholarship support to 2017 graduates of NMHS	\$ 6,000.00
23	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Support the purchase of special cheer team competition uniforms	\$ 4,150 00
24	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Support the fundraising efforts of the NMHS Anaheim Band Trip	\$ 2,500 00
25	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Provide scholarship support to 2018 graduates of NMHS	\$ 8,000.00
26	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Support the construction of the North Medford baseball/softball multi-use facility	\$ 10,000 00
27	Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Gov	Support the construction & installation of a track at Oak Grove Elementary	\$ 7,000 00
28	Jackson County School District 6 300 Ash Street Central Point, OR	N/A	Gov	Support the CHS Softball Field Improvement Project	\$ 22,675 00
29	Jacksonville Community Center PO Box 1435 Jacksonville, OR	N/A	PC	Support the Community Center Expansion project	\$ 5,000.00
30	Jacksonville Community Center PO Box 1435 Jacksonville, OR	N/A	PC	Support the Community Center Expansion project	\$ 7,640 00
31	Joni and Friends- Southern Oregon P O. Box 3333 Agoura Hills, CA	N/A	PC	Provide family retreat scholarships	\$ 2,000 00
32	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	N/A	PC	Support the greatest need in the Holly Theater Restoration project	\$ 5,000 00
33	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	PC	Support the Kids Unlimited Thanksgiving & Christmas food basket program	\$ 2,000 00
34	La Clinica 3617 S. Pacific Hwy Medford, OR	N/A	PC	Support the purchase of medical equipment at the Jackson Elementary School Based Health Center	\$ 4,880 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
35	La Clinica 3617 S. Pacific Hwy Medford, OR	N/A	PC	Support the School-based health center at Kids Unlimited Academy	\$ 5,000.00
36	Medford American- Little League Baseball P.O. Box 4059 Medford, OR	N/A	PC	Support the little league field and facilities renovation project	\$ 10,000.00
37	Medford Senior Center 510 E Main St Medford, OR	N/A	PC	Support the purchase of an ice machine for use at the Medford Senior Center	\$ 1,900.00
38	Medical Teams International 14150 SW Milton Court Tigard, OR	N/A	PC	Support the Mobile Dental clinics in Curry, Jackson, Klamath and Josephine Counties	\$ 5,000.00
39	Mt. Ashland Association 693 Washington St Ashland, OR	N/A	PC	Support the purchase of sport mats for the newly remodeled ski locker room at the Mt. Ashland Lodge	\$ 7,000.00
40	Oregon Assoc of REALTORS Home Foundation PO Box 351 Salem, OR	N/A	PC	Support the 2018 Food & Wine Classic	\$ 5,000.00
41	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR	N/A	PC	Support the South Coast SMART	\$ 2,500.00
42	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR	N/A	PC	Support the Rogue Valley SMART	\$ 5,000.00
43	Oregon Coast Community Action (ORCCA) P O. Box 899 Coos Bay, OR	N/A	PC	Support the Snack Pack program	\$ 5,000.00
44	Oregon School Resource Officers Association c/o Medford Police Department Medford, OR	N/A	PC	Provide scholarship support for officers/educators to attend the 2018 OSROA conference	\$ 2,000.00
45	Pacifica: A Garden in the Siskiyou 14615 Water Gap Road Williams, OR	N/A	PC	Support the "The Caterpillar" Mobile Science Nature Center project	\$ 3,000.00
46	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Medford, OR	N/A	PC	Support the replacement and expansion of the reserved seating area	\$ 6,000.00
47	Reaching Our Community (ROC) 564 SW Foundry Grants Pass, OR	N/A	PC	Support the food purchase program	\$ 2,500.00
48	Red Rock Cowboy Church - Hope Ranch PO Box 3788 White City, OR	N/A	Church	Support the purchase of a round pen and paddock gates	\$ 3,500.00
49	Redemption Ridge, Inc 711 Medford Center #264 Medford, OR	N/A	PC	Support the Grace House bathroom remodel project	\$ 4,762.00
50	Rogue Interagency Training Association (RITA) P.O. Box 1170 Rogue River, OR	N/A	PC	Support the purchase of text books and curriculum for the emergency medical responder class	\$ 3,310.00
51	Rogue River Fire District #1 5474 North River Rd Gold Hill, OR	N/A	Gov	Support the Swift Water Safety project	\$ 2,000.00
52	Rogue Valley Humane Society 429 NW Scenic Drive Grants Pass, OR	N/A	PC	Support the spay and neuter program	\$ 4,000.00

## 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
53	S.O Friends of Hospice PO Box 1182 Ashland, OR	N/A	PC	Support the purchase of furnishings at the Hospice House	\$ 4,746 00
54	Sky Lakes Medical Center Foundation - Klamath 2421 Washburn Way, Suite H Klamath Falls, OR	N/A	PC	General operating support	\$ 4,000 00
55	Southern Oregon Humane Society 2910 Table Rock Rd Medford, OR	N/A	PC	Support the senior and special needs cats project	\$ 2,500 00
56	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	N/A	PC	Support the McLaughlin Middle School Sparrow program	\$ 4,060 00
57	The Arc of Jackson County 121 N. Central Medford, OR	N/A	PC	Support the emergency Ken Wonderly Memorial financial assistance fund	\$ 3,500 00
58	The Pregnancy Center 2019 Aero Way Suite #103 Medford, OR	N/A	PC	Support the purchase of car seats for babies	\$ 1,500 00
59	Una Voz - LIFE Art 312 Middleford Alley Medford, OR	N/A	PC	Support your greatest need	\$ 1,000 00
60	United Way of Jackson County 60 Hawthorne Street Medford, OR	N/A	PC	Support the 2018 ONLC	\$ 1,500.00
61	Valley School of Southern Oregon 1253 N. Riverside Ave. Medford, OR	N/A	Gov	Support of the music program	\$ 2,500.00
62	VFW Post 966 507 Pacific Ave Brookings, OR	N/A	PC	Support the kitchen facility upgrade project	\$ 4,000.00
63	Wildlife Images Rehabilitation & Education Center P O. 36 Merlin, OR	N/A	PC	Support the eagle and large raptor conditioning facility	\$ 5,570 00
64	Womens Crisis Support Team 560 NE F St. A430 Medford, OR	N/A	PC	Matching grant in support of the phone system upgrade project	\$ 3,500.00
65	Youth for Christ- Rogue Valley 529 Edwards St Medford, OR	N/A	PC	Purchase equipment to support youth programming at various Campus Life Centers	\$ 5,000 00
<b>TOTAL PAID DURING THIS YEAR</b>					<b>\$ 353,916.00</b>

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

Organization: West Family Foundation  
 TIN: 20-4720365  
 Tax Year Ended: 31-May-18

**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	Addictions Recovery Center (ARC) 1003 E. Main St. Suite 104 Medford, OR	\$ 4,000.00	5/30/2018	Support the Reddy House residential treatment for new moms project		No		
2	American Sewing Guild, S.O. Chapter 2250 Crater Lake Ave. #8 Medford, OR	\$ 2,236.00	5/30/2018	Support the community service programs		No		
3	Applegate Valley Fire Protection District 1095 Upper Applegate Rd. Jacksonville, OR	\$ 5,000.00	5/30/2018	Support the Mountain Top Radio Repeater project		No		
4	Boys & Girls Clubs of the Rogue Valley 203 SE 9th Street Grants Pass, OR	\$ 4,000.00	5/30/2018	Support the teen training programs at the club Teen Center's		No		
5	Calvary Church, Jacksonville P.O. Box 117 Jacksonville, OR	\$ 2,500.00	10/9/2017	Support facility repairs and maintenance		No		
6	Camp Millennium 2726 Diamond Lake Blvd Roseburg, OR	\$ 4,000.00	5/30/2018	Sponsorship of campers dealing with a cancer diagnosis to attend the 2018 summer camp		No		
7	CASA of Klamath County 731 Main Street, Suite 202 Klamath Falls, OR	\$ 3,000.00	5/30/2018	Support the purchase of five I-pads		No		
8	City of Brookings 898 Elk Drive Brookings, OR	\$ 5,000.00	7/7/2017	Matching grant in support of the Kidtown playground renovation project		No		
9	County of Jackson Phoenix School Dist #4 745 N. Rose St. Phoenix, OR	\$ 2,000.00	5/30/2018	Phoenix Elementary - Growing Kids Through Gardening		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-18

**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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10	Crater Foundation PO Box 5172 Central Point, OR	\$ 4,000.00	06/14/2016	Support the purchase & installation of a new Scoreboard at the Crater High School Track & Field Complex		No		
11	Crescent Rural Fire Protection District 150 Mountain View Dr. Gilchrist, OR	\$ 1,700.00	5/30/2018	Purchase structural fire helmets		No		
12	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR	\$ 4,000.00	5/30/2018	Support the purchase of rubber footing for the arena		No		
13	Divide Camp, Inc. PO Box 49 Joseph, OR	\$ 6,000.00	5/30/2018	Healing wounded veterans through wilderness adventures		No		
14	Evans Valley Fire District #6 8677 East Evans Creek Road Rogue River, OR	\$ 6,500.00	5/30/2018	Support the purchase of a "Jaws of Life" vehicle extrication tool		No		
15	Favell Museum, Inc. 125 West Main Street Klamath Falls, OR	\$ 4,000.00	5/30/2018	Support the visual art education project		No		
16	Friends of the Children of the Klamath Basin 3837 Altamont Drive Klamath Falls, OR	\$ 6,000.00	5/30/2018	Roof replacement and addition of an air conditioning unit		No		
17	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	\$ 5,000.00	5/30/2018	Support the Dove Street development project		No		
18	Hearts With A Mission 521 Edwards Medford, OR	\$ 50,000.00	7/27/2016	Support the purchase of property		No		



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19	Integral Youth Services (IYS) PO Box 1385 Klamath Falls, OR	\$ 7,378.00	5/30/2018	Support the Exodus House HVAC and security system upgrade and replacement project		No		
20	Jackson County 4-H Association (aka Oregon 4H Foundation) 569 Hanley Road Central Point, OR	\$ 4,909.00	5/30/2018	To purchase permanent livestock supplies for Antelope Beef 4-H Club		No		
21	Jackson County Fair Board 1 Peninger Rd Central Point, OR	\$ 15,000.00	10/9/2017	Provide sponsorship support so that children under age 12 can attend the 2017 Jackson County Fair free of		No		
22	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 6,000.00	6/7/2017	Provide scholarship support to 2017 graduates of NMHS		No		
23	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 4,150.00	10/9/2017	Support the purchase of special cheer team competition uniforms		No		
24	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 2,500.00	10/9/2017	Support the fundraising efforts of the NMHS Anaheim Band Trip		No		
25	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 8,000.00	10/9/2017	Provide scholarship support to 2018 graduates of NMHS		No		
26	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 10,000.00	5/30/2018	Support the construction of the North Medford baseball/softball multi-use facility		No		
27	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 7,000.00	5/30/2018	Support the construction & installation of a track at Oak Grove Elementary		No		

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28	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 22,675.00	10/9/2017	Support the CHS Softball Field Improvement Project		No		
29	Jacksonville Community Center PO Box 1435 Jacksonville, OR	\$ 5,000.00	10/9/2017	Support the Community Center Expansion project		No		
30	Jacksonville Community Center PO Box 1435 Jacksonville, OR	\$ 7,640.00	5/30/2018	Support the Community Center Expansion project		No		
31	Joni and Friends- Southern Oregon P.O. Box 3333 Agoura Hills, CA	\$ 2,000.00	5/30/2018	Provide family retreat scholarships		No		
32	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	\$ 5,000.00	10/9/2017	Support the greatest need in the Holly Theater Restoration project		No		
33	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 2,000.00	11/1/2017	Support the Kids Unlimited Thanksgiving & Christmas food basket program		No		
34	La Clinica 3617 S. Pacific Hwy Medford, OR	\$ 4,880.00	10/9/2017	Support the purchase of medical equipment at the Jackson Elementary School Based Health Center		No		
35	La Clinica 3617 S. Pacific Hwy Medford, OR	\$ 5,000.00	5/30/2018	Support the School-based health center at Kids Unlimited Academy		No		
36	Medford American- Little League Baseball P.O. Box 4059 Medford, OR	\$ 10,000.00	5/30/2018	Support the little league field and facilities renovation project		No		

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37	Medford Senior Center 510 E Main St Medford, OR	\$ 1,900.00	11/13/2017	Support the purchase of an ice machine for use at the Medford Senior Center		No		
38	Medical Teams International 14150 SW Milton Court Tigard, OR	\$ 5,000.00	5/30/2018	Support the Mobile Dental clinics in Curry, Jackson, Klamath and Josephine Counties		No		
39	Mt. Ashland Association 693 Washington St Ashland, OR	\$ 7,000.00	10/9/2017	Support the purchase of sport mats for the newly remodeled ski locker room at the Mt. Ashland Lodge		No		
40	Oregon Assoc of REALTORS Home PO Box 351 Salem, OR	\$ 5,000.00	3/15/2018	Support the 2018 Food & Wine Classic		No		
41	Oregon Childrens Foundation (SMART) 101 SW Market St. Portland, OR	\$ 2,500.00	5/30/2018	Support the South Coast SMART		No		
42	Oregon Childrens Foundation (SMART) 101 SW Market St Portland, OR	\$ 5,000.00	5/30/2018	Support the Rogue Valley SMART		No		
43	Oregon Coast Community Action (ORCCA) P.O. Box 899 Coos Bay, OR	\$ 5,000.00	5/30/2018	Support the Snack Pack program		No		
44	Oregon School Resource Officers Association c/o Medford Police Department Medford, OR	\$ 2,000.00	5/30/2018	Provide scholarship support for officers/educators to attend the 2018 OSROA conference		No		
45	Pacific: A Garden in the Siskiyou 14615 Water Gap Road Williams, OR	\$ 3,000.00	5/30/2018	Support the "The Caterpillar" Mobile Science Nature Center project		No		

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46	Peter Britt Gardens Music and Arts Festival Association P.O. Box 1124 Medford, OR	\$ 6,000.00	10/9/2017	Support the replacement and expansion of the reserved seating area		No		
47	Reaching Our Community (ROC) 564 SW Foundry Grants Pass, OR	\$ 2,500.00	5/30/2018	Support the food purchase program		No		
48	Red Rock Cowboy Church - Hope Ranch PO Box 3788 White City, OR	\$ 3,500.00	10/9/2017	Support the purchase of a round pen and paddock gates		No		
49	Redemption Ridge, Inc 711 Medford Center #264 Medford, OR	\$ 4,762.00	5/30/2018	Support the Grace House bathroom remodel project		No		
50	Rogue Interagency Training Association (RITA) P.O. Box 1170 Rogue River, OR	\$ 3,310.00	5/30/2018	Support the purchase of text books and curriculum for the emergency medical responder class		No		
51	Rogue River Fire District #1 5474 North River Rd Gold Hill, OR	\$ 2,000.00	5/30/2018	Support the Swift Water Safety project		No		
52	Rogue Valley Humane Society 429 NW Scenic Drive Grants Pass, OR	\$ 4,000.00	5/30/2018	Support the spay and neuter program		No		
53	S.O. Friends of Hospice PO Box 1182 Ashland, OR	\$ 4,746.00	11/28/2017	Support the purchase of furnishings at the Hospice House		No		

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<b>54</b>	Sky Lakes Medical Center Foundation - Klamath County CARES 2421 Washburn Way, Suite H Klamath Falls, OR	\$ 4,000.00	5/30/2018	General operating support		No		
<b>55</b>	Southern Oregon Humane Society 2910 Table Rock Rd Medford, OR	\$ 2,500.00	5/30/2018	Support the senior and special needs cats project		No		
<b>56</b>	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	\$ 4,060.00	10/9/2017	Support the McLaughlin Middle School Sparrow program		No		
<b>57</b>	The Arc of Jackson County 121 N. Central Medford, OR	\$ 3,500.00	5/30/2018	Support the emergency Ken Wonderly Memorial financial assistance fund		No		
<b>58</b>	The Pregnancy Center 2019 Aero Way Suite #103 Medford, OR	\$ 1,500.00	5/30/2018	Support the purchase of car seats for babies		No		
<b>59</b>	Una Voz - LIFE Art 312 Middleford Alley Medford, OR	\$ 1,000.00	10/9/2017	Support your greatest need		No		
<b>60</b>	United Way of Jackson County 60 Hawthorne Street Medford, OR	\$ 1,500.00	10/9/2017	Support the 2018 ONLC		No		
<b>61</b>	Valley School of Southern Oregon 1253 N. Riverside Ave Medford, OR	\$ 2,500.00	5/30/2018	Support of the music program		No		

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62	VFW Post 966 507 Pacific Ave Brookings, OR	\$ 4,000.00	10/9/2017	Support the kitchen facility upgrade project		No		
63	Wildlife Images Rehabilitation & Education Center P.O. 36 Merlin, OR	\$ 5,570.00	5/30/2018	Support the eagle and large raptor conditioning facility		No		
64	Womens Crisis Support Team 560 NE F St. A430 Medford, OR	\$ 3,500.00	7/25/2017	Matching grant in support of the phone system upgrade project		No		
65	Youth for Christ- Rogue Valley 529 Edwards St. Medford, OR	\$ 5,000.00	5/30/2018	Purchase equipment to support youth programming at various Campus Life Centers		No		
<b>TOTAL PAID DURING THIS YEAR</b>		<b>\$ 353,916.00</b>						