

Form 990-PF

Return of Private Foundation

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

Department of the Treasury
Internal Revenue Service

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
ROBERT AND FRANCES CHANEY FAMILY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
PO BOX 840

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) J Accounting method: ☒ Cash ☐ Accrual
\$ **9,086,959.** (Part I, column (d) must be on cash basis.)

A Employer identification number
20-5052365

B Telephone number
541-899-9199

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 ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	296,987.	296,987.		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	305,136.			
b	Gross sales price for all assets on line 6a	3,089,566.			
7	Capital gain net income (from Part IV, line 2)		305,136.		
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	614,967.	614,967.		
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	2,505.	0.		2,505.
b	Accounting fees STMT 4	5,390.	0.		5,390.
c	Other professional fees STMT 5	98,671.	98,671.		0.
17	Interest				
18	Taxes STMT 6	9,225.	1,372.		7,853.
19	Depreciation and depletion				
20	Occupancy	6,600.	0.		6,600.
21	Travel, conferences, and meetings	7,219.	0.		7,219.
22	Printing and publications				
23	Other expenses STMT 7	7,320.	0.		7,320.
24	Total operating and administrative expenses. Add lines 13 through 23	184,630.	100,043.		84,587.
25	Contributions, gifts, grants paid	355,329.			355,329.
26	Total expenses and disbursements. Add lines 24 and 25	539,959.	100,043.		439,916.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	75,008.			
b	Net investment income (if negative, enter -0-)		514,924.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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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	148,154.	308,495.	308,495.
	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	4,036.		
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	7,667,919.	7,592,135.	8,507,102.
	c Investments - corporate bonds			
	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)	227,863.	225,707.	271,362.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	8,047,972.	8,126,337.	9,086,959.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 10)	37,540.	40,897.	
23 Total liabilities (add lines 17 through 22)	37,540.	40,897.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	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	8,010,432.	8,085,440.	
30 Total net assets or fund balances	8,010,432.	8,085,440.		
31 Total liabilities and net assets/fund balances	8,047,972.	8,126,337.		

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	8,010,432.
2 Enter amount from Part I, line 27a	2	75,008.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	8,085,440.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,085,440.

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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 3,089,566.		2,784,430.	305,136.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			
b			
c			
d			
e			305,136.

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	305,136.
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	375,280.	8,358,027.	.044901
2015	382,301.	8,193,245.	.046661
2014	454,688.	8,788,101.	.051739
2013	437,119.	8,233,316.	.053091
2012	399,013.	8,130,039.	.049079

2 Total of line 1, column (d)	2	.245471
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	.049094
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	8,868,662.
5 Multiply line 4 by line 3	5	435,398.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	5,149.
7 Add lines 5 and 6	7	440,547.
8 Enter qualifying distributions from Part XII, line 4	8	439,916.

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.

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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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)	1	10,298.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ 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	10,298.
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	10,298.
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	3,200.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	3,200.
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	7,098.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2018 estimated tax ☐ Refunded ☐	11	

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
1b 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
1c 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. <u>OR</u>		
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

N/A

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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.FAMILYFOUNDATIONCHANEY.ORG</u>	X	
14 The books are in care of ► <u>CARRIE HANSON, EXECUTIVE DIRECTOR</u> Telephone no. ► <u>541-899-9199</u> Located at ► <u>PO BOX 840, 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? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See 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? ☐ Yes ☒ 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? ☐ Yes ☒ 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? 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?	4a	X
	4b	X

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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
Organizations relying on a current notice regarding disaster assistance, check here ☐ N/A **5b**

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

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** ☐ Yes ☒ No **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? ☐ Yes ☒ No **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
FRANCES CHANEY	PRESIDENT			
P.O. BOX 840				
JACKSONVILLE, OR 97530	10.00	0.	0.	0.
SUSAN KRAMMER	VICE PRESIDENT			
P.O. BOX 840				
JACKSONVILLE, OR 97530	5.00	0.	0.	0.
ROBIN WHITZEL	SECRETARY/TREASURER			
P.O. BOX 840				
JACKSONVILLE, OR 97530	5.00	0.	0.	0.
JASON ANDERSON	TRUSTEE			
P.O. BOX 1667				
MEDFORD, OR 97501	5.00	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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

Total number of others receiving over \$50,000 for professional services

C

Part IX-A	Summary of Direct Charitable Activities
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List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1	N/A
2	
3	
4	

Part IX-B	Summary of Program-Related Investments
------------------	---

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

Describe the two largest program-related investments made by the foundation during the year on these forms:	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

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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	8,763,359.
b	Average of monthly cash balances	1b	240,359.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	9,003,718.
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	9,003,718.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	135,056.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,868,662.
6	Minimum investment return. Enter 5% of line 5	6	443,433.

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	443,433.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	10,298.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	10,298.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	433,135.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	433,135.
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	433,135.

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	439,916.
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	439,916.
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	439,916.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				433,135.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			82,443.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 439,916.				
a Applied to 2016, but not more than line 2a			82,443.	
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 2017 distributable amount				357,473.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2017 (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 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				75,662.
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 2012 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]Form **990-PF** (2017)

3

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE ATTACHED SCHEDULE	NONE	SEE ATTACHED SCHEDULE	SEE ATTACHED SCHEDULE	355,329.
Total			▶ 3a	355,329.
b Approved for future payment				
NONE				
Total			▶ 3b	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

7-23-18
Date

PRESIDENT
Title

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

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if
self-employed

PTIN

DAVID P. HYATT, CPA

Firm's name ▶ DAVID P HYATT CPA, PC

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

Phone no. (541) 773-9407

Form 990-PF (2017)

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 DETAIL 7264	P		
b	SEE ATTACHED DETAIL 7259	P		
c	SEE ATTACHED DETAIL 7240	P		
d	SEE ATTACHED DETAIL 0169	P		
e	SEE ATTACHED DETAIL 4001	P		
f	SEE ATTACHED DETAIL 7264	P		
g	SEE ATTACHED DETAIL 7259	P		
h	SEE ATTACHED DETAIL 7240	P		
i	SEE ATTACHED DETAIL 7730	P		
j	SEE ATTACHED DETAIL 6968	P		
k	SEE ATTACHED DETAIL 0169	P		
l	SEE ATTACHED DETAIL 4001	P		
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	35,074.	35,225.	-151.
b	25,889.	29,414.	-3,525.
c	447,373.	454,940.	-7,567.
d	368,464.	352,603.	15,861.
e	9,680.	8,494.	1,186.
f	833,343.	880,636.	-47,293.
g	487,667.	356,882.	130,785.
h	2,613.	2,708.	-95.
i	41,754.	35,117.	6,637.
j	526,366.	367,300.	159,066.
k	236,475.	199,372.	37,103.
l	74,868.	61,739.	13,129.
m			
n			
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			-151.
b			-3,525.
c			-7,567.
d			15,861.
e			1,186.
f			-47,293.
g			130,785.
h			-95.
i			6,637.
j			159,066.
k			37,103.
l			13,129.
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	305,136.
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

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	296,987.	0.	296,987.	296,987.	
TO PART I, LINE 4	296,987.	0.	296,987.	296,987.	

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	2,505.	0.		2,505.
TO FM 990-PF, PG 1, LN 16A	2,505.	0.		2,505.

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	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	98,671.	98,671.		0.	
TO FORM 990-PF, PG 1, LN 16C	98,671.	98,671.		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 TAX EXPENSE	3,702.	0.		3,702.	
FEDERAL TAXES	3,200.	0.		3,200.	
+	951.	0.		951.	
FOREIGN TAXES	1,372.	1,372.		0.	
TO FORM 990-PF, PG 1, LN 18	9,225.	1,372.		7,853.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE EXPENSE	1,769.	0.		1,769.	
DUES AND SUBSCRIPTIONS	342.	0.		342.	
UTILITIES	1,962.	0.		1,962.	
OFFICE EXPENSE	112.	0.		112.	
MISCELLANEOUS	116.	0.		116.	
PUBLIC RELATIONS	341.	0.		341.	
SUPPLIES	1,121.	0.		1,121.	
BUILDING REPAIRS & MAINTENANCE	1,557.	0.		1,557.	
TO FORM 990-PF, PG 1, LN 23	7,320.	0.		7,320.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STOCKS	1,806,758.	2,435,042.
MUTUAL FUNDS	5,785,377.	6,072,060.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,592,135.	8,507,102.

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	227,863.	225,707.	271,362.
TO FORM 990-PF, PART II, LINE 15	227,863.	225,707.	271,362.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	10
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DUE TO WEST FAMILY FOUNDATION	37,540.	40,897.
TOTAL TO FORM 990-PF, PART II, LINE 22	37,540.	40,897.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 11
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CARRIE HANSON, EXECUTIVE DIRECTOR
PO BOX 840
JACKSONVILLE, OR 97530

TELEPHONE NUMBER

541-899-9199

EMAIL ADDRESS

CHANSON.FAMILYFOUDATION@GMAIL.COM

FORM AND CONTENT OF APPLICATIONS

INTERNET APPLICATION FORM FOUND ON WEBSITE
WWW.FAMILYFOUNDATIONCHANEY.ORG

ANY SUBMISSION DEADLINES

THE LAST BUSINESS DAY IN JANUARY AND JULY

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANT APPLICATIONS WILL BE ACCEPTED ONLY FROM ORGANIZATIONS WITH A 501(C)(3) TAX-STATUS DESIGNATION. NO GRANTS TO INDIVIDUALS WILL BE MADE. THE FOUNDATION AWARDS GRANTS IN FOUR STRATEGIC AREAS; HUMAN SERVICES, PUBLIC SAFETY, FAITH BASED PROGRAMS, AND OTHER CHARITABLE CAUSES TO SUPPORT CHILDREN AND THEIR FAMILIES WHO RESIDE IN THE GEOGRAPHIC AREAS OF JACKSON & JOSEPHINE COUNTIES, OREGON; BARRY COUNTY, MISSOURI AND CABELL COUNTY, WEST VIRGINIA.

THE FOLLOWING ACTIVITIES ARE INELIGIBLE FOR FUNDING: ENDOWMENTS OR ANNUAL FUND DRIVES, INDIRECT OR OVERHEAD EXPENSES, SPONSORSHIP OF FUNDRAISING EVENTS, VISUAL AND PERFORMING ARTS PROGRAMS, PROPERTY ACQUISITION.

STATEMENT S226

Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 22I)

Organization: Robert & Frances Chaney Family Foundation
 TIN: 20-5052365
 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	ACCESS P.O. Box 4666 Medford, OR	N/A	PC	Provide fresh produce to students attending elementary school in a high-poverty neighborhood	\$ 2,500.00
2	Addictions Recovery Center, Inc (ARC) 1003 E. Main St. Suite 104 Medford, OR	N/A	PC	Support the transportation enhancement project	\$ 2,500.00
3	American Heart Association 4380 SW Macadam Portland, OR	N/A	PC	Support the Jackson County Infant CPR Initiative, to purchase kits only Please don't use funds for Foundation	\$ 5,000.00
4	American Sewing Guild - Southern Oregon 1685 Wagon Trail Dr Jacksonville, OR	N/A	PC	Support the ASG Southern Oregon Chapter community service program	\$ 2,255 00
5	Ashland Emergency Food Bank P.O Box 3578 Ashland, OR	N/A	PC	Support the Food Purchase Program	\$ 3,000 00
6	Aurora Rural Fire Protection District PO Box 1009 Aurora, MO	N/A	Gov	Support the pump upgrade project	\$ 5,950.00
7	Barboursville Vounteer Fire Department PO Box 325 Barboursville, WV	N/A	PC	Support the new fire service radios project	\$ 8,500 00
8	Boys & Girls Clubs of the Rogue Valley 203 SE 9th Street Grants Pass, OR	N/A	PC	Support the teen night activities for participants in the Teen Training Programs	\$ 4,000 00
9	Butte Falls Community School Partnership PO Box 358 Butte Falls, OR	N/A	PC	Support the HVAC Replacement project	\$ 10,000 00
10	Butterfield Fire Protection District 10600 East 1st Street Butterfield, MO	N/A	Gov	Support the purchase of a Thermal Imaging Camera (TIC) and a Four Gas Meter	\$ 7,700.00
11	Cabell-Huntington Coalition for the Homeless 627 4th Avenue Huntington, WV	N/A	PC	Support the vanity fair sprinkler system & client eye exams	\$ 3,500.00
12	Calvary Church, Jacksonville P.O. 117 Jacksonville, OR	N/A	Church	Assist with the replacement of broken and/or missing stage lighting at the Calvary Church in Jacksonville	\$ 5,000.00
13	CASA of Jackson County, Inc. 409 N Front Medford, OR	N/A	PC	Support the Give A Child Hope Capital Campaign	\$ 5,000.00
14	Child Evangelism Fellowship of WV Greater 1249 Madison Avenue Huntington, WV	N/A	PC	General Operating Support	\$ 7,500 00
15	Chiron Center Incorporated P O. Box 1004 Jacksonville, OR	N/A	PC	Support the SOHTCTF Behavioral Health & Wellness Program	\$ 10,000.00

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	City of Ashland - Fire & Rescue 455 Siskiyou Blvd. Ashland, OR	N/A	Gov	Support the purchase of 3 feedback manikins	\$ 4,164.00
17	City of Jacksonville PO Box 7 Jacksonville, OR	N/A	Gov	Purchase one portable radar speed sign and related equipment/technology	\$ 3,700.00
18	Compass House Inc 332 W. 6th St Medford, OR	N/A	PC	Support the Busting Barriers & Stigma Project	\$ 2,500.00
19	Consumer Credit Counseling Services of S.O. 820 Crater Lake Ave, #202 Medford, OR	N/A	PC	Support outreach and program materials for financial and literacy education programs	\$ 2,000.00
20	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR	N/A	PC	Provide student scholarships	\$ 4,000.00
21	Dogs for Better Lives (formerly -Dogs for the Deaf) 10175 Wheeler Road Central Point, OR	N/A	PC	Support the Autism Assistance Dog Program	\$ 7,000.00
22	Emergency Communications of Southern Oregon 400 Pech Road Central Point, OR	N/A	Gov	Purchase an Ogawa 3D Smart Massage Chair for the 911 Call Taker/Dispatcher	\$ 7,000.00
23	Evans Valley Fire District #6 8677 East Evans Creek Road Rogue River, OR	N/A	Gov	Purchase new fire hose and nozzles	\$ 6,700.00
24	Facing Hunger Food Bank 1327 7th Ave. Huntington, WV	N/A	PC	Purchase a fork truck for use to load, move and distribute food and prepared boxes for the Senior	\$ 10,000.00
25	Goodwill of KYOWVA 1102 Memorial Boulevard Huntington, WV	N/A	PC	Support the Milton Economic Enrichment Project	\$ 5,000.00
26	Grants Pass Sobering Center, Inc. P.O. Box 1388 Grants Pass, OR	N/A	PC	Support the Sobering Center Flooring Project	\$ 4,120.00
27	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	N/A	PC	Support the demolition of the abandoned home at the 10th St Project	\$ 10,000.00
28	HOPE Equestrian Center PO Box 396 Eagle Point, OR	N/A	PC	Multi year gift in support of Home for Hope Capital Campaign, with naming rights opportunities	\$ 10,000.00
29	Huntington City Mission 624 10th Street Huntington, WV	N/A	PC	Support the Community Feeding Program	\$ 3,000.00
30	Illinois Valley Fire District 681 Caves Hwy Cave Junction, OR	N/A	Gov	Purchasing workout equipment for firefighters	\$ 2,000.00
31	Jackson County Child Abuse Task Force - CAC 816 W. 10th Street Medford, OR	N/A	PC	Therapy Dog goes to Courtroom Dog Conference	\$ 3,700.00
32	Jackson County Master Gardener Association 569 Hanley Rd. Central Point, OR	N/A	PC	Support the Children's Garden Refurbishment Project, purchase a new wheel barrow, and utilize any	\$ 2,200.00
33	Jackson County School District 6 300 Ash Street Central Point, OR	N/A	Gov	Support the purchase of a laser engraver for use in the Scenic Middle School STEAM program	\$ 7,000.00

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
34	Jacksonville Community Center, Inc. PO Box 1435 Jacksonville, OR	N/A	PC	Purchase kitchen equipment such as appliances and work tables in the newly expanded Jacksonville	\$ 3,000.00
35	Josephine County Fair Board P.O. Box 672 Grants Pass, OR	N/A	Gov	Support the Floral Building Upgrades project	\$ 5,000.00
36	Josephine County Foundation P.O. Box 673 Murphy, OR	N/A	PC	Support the HALT (Helping All Local Teens) Anti-bullying Campaign	\$ 8,000.00
37	Junior Achievement 7830 SE Foster Road Portland, OR	N/A	PC	Support JA In-Class Programs in Jackson & Josephine County	\$ 2,400.00
38	Junior League of Jackson County PO box 1504 Medford, OR	N/A	PC	Support the Rogue Power Pack project	\$ 6,000.00
39	KAIROS Northwest 715 SW Ramsey Ave Medford, OR	N/A	PC	Purchase 4 safe, youth friendly rocking chairs	\$ 5,000.00
40	Kids Unlimited of Oregon 821 N Riverside Medford, OR	N/A	PC	Assist in the purchase of a ceiling mounted, remote controlled video screen	\$ 5,000.00
41	Kornerstone Program of Shell Knob Missouri P.O. Box 396 Shell Knob, MO	N/A	PC	Support the teen parent program	\$ 4,000.00
42	La Clínica Del Valle Family Health Care Center 3617 S. Pacific Hwy Medford, OR	N/A	PC	Support the School-Based Health Center at Kids Unlimited Academy	\$ 5,000.00
43	Medical Teams International 14150 SW Milton Court Tigard, OR	N/A	PC	Support the Southern Oregon Mobile Dental Program	\$ 5,000.00
44	Mercy Health Foundation Springfield 3265 S. National, Suite 200 Springfield, MO	N/A	PC	Support the Barry County LUCAS Device project	\$ 6,620.00
45	Mercy's Gate Rogue Valley 711 Medford Center, #179 Medford, OR	N/A	PC	Support Rogue Valley Homelessness Prevention Efforts	\$ 7,500.00
46	Milton Volunteer Fire Department 341 E. Main Street Milton, WV	N/A	PC	Support the Fire Gear project	\$ 10,000.00
47	Mother Teresa Home dba. Magdalene Home 12 Black Oak Drive Medford, OR	N/A	PC	Support the School Success project for teen mothers	\$ 2,500.00
48	Muscular Dystrophy Association (MDA) 4800 SW Macadam Ave, Suite 205 Portland, OR	N/A	PC	Support the work of the MDA	\$ 5,000.00
49	Oregon Assoc. of Realtors Home Foundation PO Box 351 Salem, OR	N/A	PC	Provide sponsorship support of the Rogue Valley Association of Realtors 2018 Food & Wine Classic.	\$ 2,500.00
50	Oregon School Resource Officers Association c/o Medford Police Department 411 West 8th Medford, OR	N/A	PC	Support the 2018 OSROA Annual School Safety Conference	\$ 1,000.00
51	Ozarks Regional YMCA 408 St Hwy 248 Cassville, MO	N/A	PC	Support the purchase of a play structure at the Cassville YMCA Child play area.	\$ 5,700.00

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
52	Phoenix Counseling Center, Inc (PCCI) P.O. Box 1257 Phoenix, OR	N/A	PC	Support the Expanded Adolescent Substance Use Treatment Program	\$ 4,000.00
53	Pregnancy Center of the Illinois Valley PO Box 993 Cave Junction, OR	N/A	PC	Provide general operating support	\$ 5,000.00
54	Purdy Fire Protection District P.O. Box 51 Purdy, MO	N/A	PC	Support the communications upgrade project	\$ 8,300.00
55	Redemption Ridge, Inc 711 Medford Center #264 Medford, OR	N/A	PC	Support the Grace House Care Specialist position	\$ 10,000.00
56	Rogue Community College (RCC) 3345 Redwood Highway Grants Pass, OR	N/A	PC	Support the Advanced Cardiac Life Support (ACLS) Training Center project	\$ 5,000.00
57	Rogue Valley Search and Rescue (K9 Team) 620 Antelope Road White City, OR	N/A	PC	Purchase updated GPS tracking technology for the Rogue Valley Search and Rescue (RVSAR) K9	\$ 4,900.00
58	Rogue Valley Veterans & Community Outreach 601 N. Grape Street Medford, OR	N/A	PC	Support the security upgrades at the Per Diem Houses	\$ 5,000.00
59	Roots and Wings Child Development 3703 International Way, Suite B Medford, OR	N/A	PC	Support the Learning Materials for Learning Opportunities Project	\$ 2,200.00
60	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR	N/A	PC	Support the Expanding and Enhancing Youth Programming Project	\$ 2,500.00
61	Society of St. Vincent de Paul P.O. Box 1663 Medford, OR	N/A	PC	Emergency Rental Assistance	\$ 2,500.00
62	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	N/A	PC	Support the Southern Oregon Sparrow program expansion project	\$ 6,000.00
63	Special Olympics Oregon 5901 SW Macadam Avenue Suite 200 Portland, OR	N/A	PC	Support the Southern Oregon Unified Champion Schools Youth Leadership Summit	\$ 2,500.00
64	St. Mark's Episcopal Church 426 W. 6th Street Medford, OR	N/A	Church	Support the Food Pantry Project	\$ 3,000.00
65	Sugarloaf Community Association PO Box 440 Williams, OR	N/A	PC	Support the purchase of tables & chairs at Learning Center	\$ 1,000.00
66	Team Overland 42 S. Barneburg Rd Medford, OR	N/A	PC	Support Team Overland outdoor adventures for Veterans	\$ 7,500.00
67	The Pregnancy Center 2019 Aero Way, Suite 103 Medford, OR	N/A	PC	Support the New Moms Club	\$ 4,400.00
68	The Salvation Army, Grants Pass Corps 1377 Redwood Ave. Grants Pass, OR	N/A	PC	Support the purchase of shopping carts for use in The Salvation Army Food Pantry	\$ 1,000.00
69	United Way of Jackson County 60 Hawthorne Street Medford, OR	N/A	PC	Support the 2018 ONLC in Ashland, Oregon	\$ 1,500.00

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
70 Wilderness Trails, Inc. P. O. Box 4655 Medford, OR	N/A	PC	Support the 2017-18 Follow Up Programs	\$ 3,000 00
71 YMCA dba Rogue Valley Family YMCA 522 West Sixth Street Medford, OR	N/A	PC	Support the purchase of furniture and circle time supplies outlined in the Preschool & Child Care Learning	\$ 3,000.00
72 Young Life Rogue Valley 1390 Oleander, Suite B Medford, OR	N/A	PC	Provide 4 youth scholarships to Young Life Camp	\$ 2,320 00
73 Youth for Chrst, Rogue Valley 529 Edward St. Medford, OR	N/A	PC	Support the JJM/Grants Pass Program Expansion	\$ 5,000 00
TOTAL PAID DURING THIS YEAR				\$ 355,329 00

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

Organization: Robert & Frances Chaney Family Foundation
 TIN: 20-5052365
 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	ACCESS P.O. Box 4666 Medford, OR	\$ 2,500.00	4/17/2018	Provide fresh produce to students attending elementary school in a high-poverty neighborhood		No		
2	Addictions Recovery Center, Inc (ARC) 1003 E. Main St. Suite 104 Medford, OR	\$ 2,500.00	10/24/2017	Support the transportation enhancement project		No		
3	American Heart Association 4380 SW Macadam Portland, OR	\$ 5,000.00	10/24/2017	Support the Jackson County Infant CPR Initiative, to purchase kits only. Please don't use funds for Foundation		No		
4	American Sewing Guild - Southern Oregon Chapter 1685 Wagon Trail Dr Jacksonville, OR	\$ 2,255.00	10/24/2017	Support the ASG Southern Oregon Chapter community service program		No		
5	Ashland Emergency Food Bank P.O. Box 3578 Ashland, OR	\$ 3,000.00	10/24/2017	Support the Food Purchase Program		No		
6	Aurora Rural Fire Protection District PO Box 1009 Aurora, MO	\$ 5,950.00	10/20/2017	Support the pump upgrade project		No		
7	Barboursville Volunteer Fire Department PO Box 325 Barboursville, WV	\$ 8,500.00	10/20/2017	Support the new fire service radios project		No		
8	Boys & Girls Clubs of the Rogue Valley 203 SE 9th Street Grants Pass, OR	\$ 4,000.00	4/17/2018	Support the teen night activities for participants in the Teen Training Programs		No		
9	Butte Falls Community School Partnership PO Box 358 Butte Falls, OR	\$ 10,000.00	4/17/2018	Support the HVAC Replacement project		No		

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Substantiation of Exercise of Expenditure Responsibility

(See Key Issue 26G)

Organization: Robert & Frances Chaney Family Foundation

TIN: 20-5052365

Tax Year Ended: 31-May-18

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10	Butterfield Fire Protection District 10600 East 1st Street Butterfield, MO	\$ 7,700.00	4/17/2018	Support the purchase of a Thermal Imaging Camera (TIC) and a Four Gas Meter		No		
11	Cabell-Huntington Coalition for the Homeless 627 4th Avenue Huntington, WV	\$ 3,500.00	4/17/2018	Support the vanity fair sprinkler system & client eye exams		No		
12	Calvary Church, Jacksonville P.O. 117 Jacksonville, OR	\$ 5,000.00	5/10/2018	Assist with the replacement of broken and/or missing stage lighting at the Calvary Church in Jacksonville		No		
13	CASA of Jackson County, Inc. 409 N. Front Medford, OR	\$ 5,000.00	4/17/2018	Support the Give A Child Hope Capital Campaign		No		
14	Child Evangelism Fellowship of WV Greater Huntington Chapter 1249 Madison Avenue Huntington, WV	\$ 7,500.00	10/24/2017	General Operating Support		No		
15	Chiron Center Incorporated P.O. Box 1004 Jacksonville, OR	\$ 10,000.00	4/17/2018	Support the SOHTCTF Behavioral Health & Wellness Program		No		
16	City of Ashland - Fire & Rescue 455 Siskiyou Blvd. Ashland, OR	\$ 4,184.00	4/17/2018	Support the purchase of 3 feedback manikins		No		
17	City of Jacksonville PO Box 7 Jacksonville, OR	\$ 3,700.00	4/17/2018	Purchase one portable radar speed sign and related equipment/technology		No		
18	Compass House Inc. 332 W. 6th St. Medford, OR	\$ 2,500.00	4/17/2018	Support the Busting Barriers & Stigma Project		No		

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19	Consumer Credit Counseling Services of S.O., Inc. 820 Crater Lake Ave, #202 Medford, OR	\$ 2,000.00	4/17/2018	Support outreach and program materials for financial and literacy education programs		No		
20	Crossing Bridges Therapeutic Riding Center P.O. Box 2276 Grants Pass, OR	\$ 4,000.00	4/17/2018	Provide student scholarships		No		
21	Dogs for Better Lives (formerly -Dogs for the Deaf) 10175 Wheeler Road Central Point, OR	\$ 7,000.00	10/24/2017	Support the Autism Assistance Dog Program		No		
22	Emergency Communications of Southern Oregon 400 Pech Road Central Point, OR	\$ 7,000.00	4/17/2018	Purchase an Ogawa 3D Smart Massage Chair for the 911 Call Taker/Dispatcher		No		
23	Evans Valley Fire District #6 8677 East Evans Creek Road Rogue River, OR	\$ 6,700.00	4/17/2018	Purchase new fire hose and nozzles		No		
24	Facing Hunger Food Bank 1327 7th Ave. Huntington, WV	\$ 10,000.00	4/17/2018	Purchase a fork truck for use to load, move and distribute food and prepared boxes for the Senior		No		
25	Goodwill of KYOWVA 1102 Memorial Boulevard Huntington, WV	\$ 5,000.00	4/17/2018	Support the Milton Economic Enrichment Project		No		

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26	Grants Pass Sobering Center, Inc. P.O. Box 1388 Grants Pass, OR	\$ 4,120.00	10/24/2017	Support the Sobering Center Flooring Project		No		
27	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	\$ 10,000.00	10/24/2017	Support the demolition of the abandoned home at the 10th St Project		No		
28	HOPE Equestrian Center PO Box 396 Eagle Point, OR	\$ 10,000.00	4/17/2018	Multi year gift in support of Home for Hope Capital Campaign, with naming rights opportunities		No		
29	Huntington City Mission 624 10th Street Huntington, WV	\$ 3,000.00	10/24/2017	Support the Community Feeding Program		No		
30	Illinois Valley Fire District 681 Caves Hwy Cave Junction, OR	\$ 2,000.00	4/17/2018	Purchasing workout equipment for firefighters		No		
31	Jackson County Child Abuse Task Force - CAC 816 W. 10th Street Medford, OR	\$ 3,700.00	10/19/2017	Therapy Dog goes to Courtroom Dog Conference		No		
32	Jackson County Master Gardener Association 569 Hanley Rd Central Point, OR	\$ 2,200.00	4/17/2018	Support the Children's Garden Refurbishment Project, purchase a new wheel barrow, and utilize any remaining funds to assist with student		No		
33	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 7,000.00	10/24/2017	Support the purchase of a laser engraver for use in the Scenic Middle School STEAM program		No		
34	Jacksonville Community Center, Inc PO Box 1435 Jacksonville, OR	\$ 3,000.00	4/17/2018	Purchase kitchen equipment such as appliances and work tables in the newly expanded Jacksonville		No		

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35	Josephine County Fair Board P.O. Box 672 Grants Pass, OR	\$ 5,000.00	10/24/2017	Support the Floral Building Upgrades project		No		
36	Josephine County Foundation P.O. Box 673 Murphy, OR	\$ 8,000.00	10/24/2017	Support the HALT (Helping All Local Teens) Anti-bullying Campaign		No		
37	Junior Achievement 7830 SE Foster Road Portland, OR	\$ 2,400.00	10/24/2017	Support JA In-Class Programs in Jackson & Josephine County		No		
38	Junior League of Jackson County PO box 1504 Medford, OR	\$ 6,000.00	2/1/2018	Support the Rogue Power Pack project		No		
39	KAiOS Northwest 715 SW Ramsey Ave Medford, OR	\$ 5,000.00	4/17/2018	Purchase 4 safe, youth friendly rocking chairs		No		
40	Kids Unlimited of Oregon 821 N. Riverside Medford, OR	\$ 5,000.00	4/17/2018	Assist in the purchase of a ceiling mounted, remote controlled video screen		No		
41	Kornerstone Program of Shell Knob Missouri P.O. Box 396 Shell Knob, MO	\$ 4,000.00	10/20/2017	Support the teen parent program		No		
42	La Clinica Del Valle Family Health Care Center 3617 S. Pacific Hwy Medford, OR	\$ 5,000.00	10/24/2017	Support the School-Based Health Center at Kids Unlimited Academy		No		
43	Medical Teams International 14150 SW Milton Court Tigard, OR	\$ 5,000.00	10/26/2017	Support the Southern Oregon Mobile Dental Program		No		

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44	Mercy Health Foundation Springfield 3265 S National, Suite 200 Springfield, MO	\$ 6,620.00	10/20/2017	Support the Barry County LUCAS Device project		No		
45	Mercy's Gate Rogue Valley 711 Medford Center, #179 Medford, OR	\$ 7,500.00	10/25/2017	Support Rogue Valley Homelessness Prevention Efforts		No		
46	Milton Volunteer Fire Department 341 E Main Street Milton, WV	\$ 10,000.00	10/24/2017	Support the Fire Gear project		No		
47	Mother Teresa Home dba. Magdalene Home 12 Black Oak Drive Medford, OR	\$ 2,500.00	4/17/2018	Support the School Success project for teen mothers		No		
48	Muscular Dystrophy Association (MDA) 4800 SW Macadam Ave, Suite 205 Portland, OR	\$ 5,000.00	10/25/2017	Support the work of the MDA		No		
49	Oregon Assoc of Realtors Home Foundation PO Box 351 Salem, OR	\$ 2,500.00	2/19/2018	Provide sponsorship support of the Rogue Valley Association of Realtors 2018 Food & Wine Classic.		No		
50	Oregon School Resource Officers Association c/o Medford Police Department 411 West 8th Street Medford, OR	\$ 1,000.00	4/17/2018	Support the 2018 OSROA Annual School Safety Conference		No		
51	Ozarks Regional YMCA 408 St Hwy 248 Cassville, MO	\$ 5,700.00	4/17/2018	Support the purchase of a play structure at the Cassville YMCA Child play area.		No		

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52	Phoenix Counseling Center, Inc. (PCCI) P.O. Box 1257 Phoenix, OR	\$ 4,000.00	4/17/2018	Support the Expanded Adolescent Substance Use Treatment Program		No		
53	Pregnancy Center of the Illinois Valley PO Box 993 Cave Junction, OR	\$ 5,000.00	10/26/2017	Provide general operating support		No		
54	Purdy Fire Protection District P.O. Box 51 Purdy, MO	\$ 8,300.00	4/17/2018	Support the communications upgrade project		No		
55	Redemption Ridge, Inc. 711 Medford Center #264 Medford, OR	\$ 10,000.00	4/17/2018	Support the Grace House Care Specialist position		No		
56	Rogue Community College (RCC) 3345 Redwood Highway Grants Pass, OR	\$ 5,000.00	10/25/2017	Support the Advanced Cardiac Life Support (ACLS) Training Center project		No		
57	Rogue Valley Search and Rescue (K9 Team) 620 Antelope Road White City, OR	\$ 4,900.00	4/17/2018	Purchase updated GPS tracking technology for the Rogue Valley Search and Rescue (RVSAR) K9 Team		No		
58	Rogue Valley Veterans & Community Outreach 601 N. Grape Street Medford, OR	\$ 5,000.00	10/25/2017	Support the security upgrades at the Per Diem Houses		No		
59	Roots and Wings Child Development 3703 International Way, Suite B Medford, OR	\$ 2,200.00	10/26/2017	Support the Learning Materials for Learning Opportunities Project		No		

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60	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR	\$ 2,500.00	10/25/2017	Support the Expanding and Enhancing Youth Programming Project		No		
61	Society of St. Vincent de Paul P.O. Box 1663 Medford, OR	\$ 2,500.00	4/17/2018	Emergency Rental Assistance		No		
62	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	\$ 6,000.00	2/1/2018	Support the Southern Oregon Sparrow program expansion project		No		
63	Special Olympics Oregon 5901 SW Macadam Avenue Suite 200 Portland, OR	\$ 2,500.00	10/25/2017	Support the Southern Oregon Unified Champion Schools Youth Leadership Summit		No		
64	St. Mark's Episcopal Church 426 W. 6th Street Medford, OR	\$ 3,000.00	10/25/2017	Support the Food Pantry Project		No		
65	Sugarloaf Community Association PO Box 440 Williams, OR	\$ 1,000.00	10/25/2017	Support the purchase of tables & chairs at Learning Center		No		
66	Team Overland 42 S. Barneburg Rd Medford, OR	\$ 7,500.00	4/17/2018	Support Team Overland outdoor adventures for Veterans		No		
67	The Pregnancy Center 2019 Aero Way, Suite 103 Medford, OR	\$ 4,400.00	4/17/2018	Support the New Moms Club		No		
68	The Salvation Army, Grants Pass Corps 1377 Redwood Ave Grants Pass, OR	\$ 1,000.00	10/25/2017	Support the purchase of shopping carts for use in The Salvation Army Food Pantry		No		

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69	United Way of Jackson County 60 Hawthorne Street Medford, OR	\$ 1,500.00	12/7/2017	Support the 2018 ONLC in Ashland, Oregon		No		
70	Wilderness Trails, Inc P. O. Box 4655 Medford, OR	\$ 3,000.00	10/25/2017	Support the 2017-18 Follow Up Programs		No		
71	YMCA dba Rogue Valley Family YMCA 522 West Sixth Street Medford, OR	\$ 3,000.00	10/25/2017	Support the purchase of furniture and circle time supplies outlined in the Preschool & Child Care Learning		No		
72	Young Life Rogue Valley 1390 Oleander, Suite B Medford, OR	\$ 2,320.00	4/17/2018	Provide 4 youth scholarships to Young Life Camp		No		
73	Youth for Christ, Rogue Valley 529 Edward St. Medford, OR	\$ 5,000.00	4/17/2018	Support the JYM/Grants Pass Program Expansion		No		
TOTAL PAID DURING THIS YEAR		\$ 355,329.00						