

2949129202102 9

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](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0052

**2018**

Open to Public Inspection

For calendar year 2018 or tax year beginning

**JUN 1, 2018**

, and ending

**MAY 31, 2019**

Name of foundation

A Employer identification number

**WEST FAMILY FOUNDATION****20-4720365**

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

Room/suite

B Telephone number

**680 G STREET, SUITE B****541-899-9976**

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

C If exemption application is pending, check here ☐**JACKSONVILLE, OR 97530**

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1. Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method: ☒ Cash ☐ AccrualF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

(from Part II, col. (c), line 16)

☐ Other (specify) \_\_\_\_\_▶ \$ **8,796,935.** (Part I, column (d) must be on cash basis.)**Part I Analysis of Revenue and Expenses**

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>			<b>N/A</b>	
1 Contributions, gifts, grants, etc., received				
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	363,515.	363,515.		STATEMENT 1
5a Gross rents	6,424.	6,424.		STATEMENT 2
b Net rental income or (loss) 6,424.				
6a Net gain or (loss) from sale of assets not on line 10	31,783.			
b Gross sales price for all assets on line 6a 4,814,493.				
7 Capital gain net income (from Part IV, line 2)		31,783.		
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	401,722.	401,722.		
<b>Operating and Administrative Expenses</b>				
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages	47,833.	0.		47,833.
15 Pension plans, employee benefits	3,348.	0.		3,348.
16a Legal fees	1,775.	0.		1,775.
b Accounting fees	5,686.	0.		5,686.
c Other professional fees	92,421.	92,421.		0.
17 Interest				
18 Taxes	15,908.	1,781.		14,127.
19 Depreciation and depletion				
20 Occupancy	7,904.	0.		7,904.
21 Travel, conferences, and meetings	196.	0.		196.
22 Printing and publications				
23 Other expenses	17,386.	0.		17,386.
24 Total operating and administrative expenses Add lines 13 through 23	192,457.	94,202.		98,255.
25 Contributions, gifts, grants paid	339,474.			339,474.
26 Total expenses and disbursements Add lines 24 and 25	531,931.	94,202.		437,729.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-130,209.			
b Net investment income (if negative, enter -0-)		307,520.		
c Adjusted net income (if negative, enter -0-)			N/A	

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	156,473.	2,248,564.	2,248,564.
	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			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	7,336,219.	5,122,092.	6,244,285.
	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 )		266,607.	258,434.	304,086.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		7,759,299.	7,629,090.	8,796,935.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe ▶ )				
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31 ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 ▶ <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	7,759,299.	7,629,090.	
30 Total net assets or fund balances	7,759,299.	7,629,090.		
31 Total liabilities and net assets/fund balances	7,759,299.	7,629,090.		

## 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	7,759,299.
2 Enter amount from Part I, line 27a	2	-130,209.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,629,090.
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	7,629,090.

**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.)
<b>1a</b>				
<b>b</b> SEE ATTACHED STATEMENTS				
<b>c</b>				
<b>d</b>				
<b>e</b>				

(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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 4,814,493.		4,782,710.	31,783.

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))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			31,783.

<b>2</b> 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	31,783.
<b>3</b> 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))
2017	429,113.	8,734,433.	.049129
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

<b>2</b> Total of line 1, column (d)	2	.248181
<b>3</b> 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	.049636
<b>4</b> Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	8,473,590.
<b>5</b> Multiply line 4 by line 3	5	420,595.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	3,075.
<b>7</b> Add lines 5 and 6	7	423,670.
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	437,729.

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.

## WEST FAMILY FOUNDATION

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

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	521,395.	539,001.	-17,606.
b	1,959,429.	1,981,850.	-22,421.
c	77,943.	94,255.	-16,312.
d	50,040.	57,255.	-7,215.
e	510.	489.	21.
f	107,537.	90,213.	17,324.
g	1,542.	1,551.	-9.
h	172,560.	126,779.	45,781.
i	308,704.	314,067.	-5,363.
j	274,256.	301,542.	-27,286.
k	220,979.	223,180.	-2,201.
l	749,297.	781,444.	-32,147.
m	297.	297.	0.
n	22,633.	22,735.	-102.
o	250,470.	184,842.	65,628.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-17,606.
b			-22,421.
c			-16,312.
d			-7,215.
e			21.
f			17,324.
g			-9.
h			45,781.
i			-5,363.
j			-27,286.
k			-2,201.
l			-32,147.
m			0.
n			-102.
o			65,628.

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

2

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

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

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

3

WEST FAMILY FOUNDATION

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

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHED #3930	P		
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 96,901.		63,210.	33,691.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			33,691.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	31,783.
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	3,075.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	2	0.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)	3	3,075.
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	3,075.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		
5	<b>Tax based on investment income</b> Subtract line 4 from line 3. If zero or less, enter -0-		
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	6,800.
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	6,800.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	<b>Tax due</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	3,725.
11	Enter the amount of line 10 to be <b>Credited to 2019 estimated tax</b> <b>3,200.</b> Refunded	11	525.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		X

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?  
 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.  
 c Did the foundation file Form 1120-POL for this year?  
 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  
 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  
 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  
 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  
 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?  
 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  
 8a Enter the states to which the foundation reports or with which it is registered. See instructions. **OR**  
 b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  
 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 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV  
 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

**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 2018, 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 ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here. ► <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____, _____, _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2018 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 2018.) 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 2018?	4b	X

Form 990-PF (2018)

**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 ☒ Nob 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 hereN/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?

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

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  
If "Yes" to 6b, file Form 8870.☐ Yes ☒ No

7b

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No**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	PRESIDENT			
680 G STREET, SUITE B				
JACKSONVILLE, OR 97530	10.00	0.	0.	0.
CAROLYN WEST	VICE-PRESIDENT			
680 G STREET, SUITE B				
JACKSONVILLE, OR 97530	10.00	0.	0.	0.
JASON ANDERSON	SECRETARY/TREASURER			
PO BOX 1667				
MEDFORD, OR 97501	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 (2018)





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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	8,243,044.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	359,585.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	8,602,629.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	8,602,629.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	129,039.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	8,473,590.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	423,680.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	423,680.
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5	<b>2a</b>	3,075.
<b>b</b>	Income tax for 2018. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	3,075.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	420,605.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	420,605.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	420,605.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	437,729.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	437,729.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	3,075.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	434,654.

**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.

Form 990-PF (2018)

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				420,605.
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only			69,298.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2018:				
<b>a</b> From 2013				
<b>b</b> From 2014				
<b>c</b> From 2015				
<b>d</b> From 2016				
<b>e</b> From 2017				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4: ► \$ 437,729.				
<b>a</b> Applied to 2017, but not more than line 2a			69,298.	
<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 2018 distributable amount				368,431.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2018 (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 2017. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				52,174.
<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 2013 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2014				
<b>b</b> Excess from 2015				
<b>c</b> Excess from 2016				
<b>d</b> Excess from 2017				
<b>e</b> Excess from 2018				

---

N/A

- 4942(j)(5)

(4) Gross investment income

[illegible]

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

**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 Paid during the year</b>				
SEE ATTACHED STATEMENT	NONE	SEE ATTACHED STATEMENT	SEE ATTACHED STATEMENT	339,474.
<b>Total</b>			<b>3a</b>	339,474.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	0.

Form 990-PF (2018)

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

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	363,515.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property	531190	6,424.			
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory	523000	31,783.			
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e)		38,207.		363,515.	0.
13 Total. Add line 12, columns (b), (d), and (e)					401,722.

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]

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

- |  | Yes | No |
|--|-----|----|
|--|-----|----|

1a(1)	X
-------	---

1a(2)		X
-------	--	---

--	--	--

1b(1)	X
-------	---

1b(2)		X
-------	--	---

1b(3)		X
-------	--	---

1b(4)	X
-------	---

1b(5)		<b>X</b>
-------	--	----------

1b(6)		X
-------	--	---

1c		X
----	--	---

other assets.

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.

☐ Yes ☒ No

**(c) Description of relationship**

**PRESIDENT**

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

☒ Yes ☐ No

PTIN	
------	--

P00883351

Firm's EIN ► 26-1932063

Phone no. (541) 773-9407

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

Organization: West Family Foundation  
TIN: 20-4720365  
Tax Year Ended: 31-May-19

**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	American Sewing Guild, S.O. Chapter 2250 Crater Lake Ave. #8 Medford, OR	\$ 2,505.00	5/15/2019	Support the community service programs of the ASG Southern Oregon Chapter		No		
2	Asante Foundation 2600 Siskiyou Blvd. Medford, OR	\$ 6,000.00	11/14/2018	To assist with the purchasing of the furniture for the group room in the Behavioral Health Initiative		No		
3	Butte Creek Mill Foundation PO Box 957 Eagle Point, OR	\$ 5,000.00	5/15/2019	Support the rebuilding and restoration of the Butte Creek Mill and Ice House		No		
4	Calvary Church, Jacksonville P.O. Box 117 Jacksonville, OR	\$ 1,500.00	9/25/2018	Support the youth programs at Calvary Church		No		
5	CASA of Jackson County, Inc. 409 N Front Street Medford, OR	\$ 3,000.00	5/15/2019	Support the dual county CASA library program		No		
6	Central Curry School District #1 29516 Ellensburg Ave Gold Beach, OR	\$ 4,200.00	5/15/2019	Support Gold Beach High School (GBHS) Career Pathway in Digital Arts Media project		No		
7	County of Jackson Phoenix School Dist. #4 745 N. Rose St Phoenix, OR	\$ 2,000.00	5/15/2019	Support the purchase of cheer mats at Phoenix High School		No		PBC
8	Crater Foundation PO Box 5172 Central Point, OR	\$ 4,000.00	6/10/2018	Support the purchase & Installation of a new Scoreboard at the Crater High School Track & Field Complex		No		PBC
9	Divide Camp, Inc. PO Box 49 Joseph, OR	\$ 6,000.00	11/14/2018	Support the work of Divide Camp		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-19

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

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

	Name and Address of Grantee	Amount of Grant \$	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
10	Divide Camp, Inc. PO Box 49 Joseph, OR	\$ 9,465.00	5/15/2019	Support the healing wounded veterans through wilderness adventures project		No		
11	Dogs for Better Lives (formerly Dogs for the Deaf) 10175 Wheeler Road Central Point, OR	\$ 5,000.00	5/15/2019	Support the community tour experience		No		
12	Faith House 220 NW A Street Grant Pass, OR	\$ 5,000.00	5/15/2019	Support the electrical & plumbing safety upgrades at the Faith House		No		
13	Familia Unida 8089 Abbey Road White City, OR	\$ 5,000.00	5/15/2019	Support the Familia Unida bike program		No		
14	Friends of Josephine County Food Bank Network PO Box 2363 Grants Pass, OR	\$ 3,000.00	5/15/2019	Support the purchase of a battery powered three-wheeled forklift for use in the warehouse at the Josephine County Food Bank		No		
15	Friends of the Fair Foundation 3551 E. Barnett Road, Ste 105 Medford, OR	\$ 5,000.00	11/14/2018	Support the purchase of Big Ass fans in the Ulsrud Arena for use at the Junior Livestock Auction and other		No		
16	Grace Point Christian Fellowship P O. Box 1133 Medford, OR	\$ 5,000.00	5/15/2019	Support the ROC Recovery Center Mobile Outreach/Start Up program		No		
17	Grants Pass School District #7 725 NE Dean Drive Grants Pass, OR	\$ 5,000.00	5/15/2019	Support the construction of an outdoor basketball court with 6 hoops at GPHS		No		
18	Hearts With A Mission 521 Edwards Medford, OR	\$ 50,000.00	7/27/2016	Support the purchase of property		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-19

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

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

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Purpose of the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
19	Illinois River Valley Arts Council P.O. Box 522 Cave Junction, OR	\$ 3,510.00	5/15/2019	Support the Lorna Byrne Middle School learning through the arts program		No		
20	Jackson County 4H & FFA Junior Livestock Auction Committee 12100 Agate Road Eagle Point, OR	\$ 3,445.00	9/17/2018	Support the 2018 Junior Livestock Auction at the Jackson County Fair		No		
21	Jackson County Fair Board 1 Peninger Rd Central Point, OR	\$ 15,000.00	6/11/2018	Support the Kids 12 & under free sponsorship program at the 2018 Jackson County Summer Fair		No		
22	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 8,731.00	11/14/2018	Support the purchase and installation of a new playground for the kindergartners and younger students		No		
23	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 7,500.00	4/18/2019	Scholarships for NMHS Graduating Seniors		No		
24	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 1,500.00	5/15/2019	Support the Washington Elementary Mobile Library Program		No		
25	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 125.00	12/10/2018	Support of the e North Medford Storm AAU Boys Basketball Team		No		
26	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 920.00	5/15/2019	Support the NMHS - Color Guard Equipment Bags		No		
27	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 2,000.00	11/19/2018	Support the Winter Wishes program at North Medford High School		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-19

**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
28	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 4,000.00	5/15/2019	Support the McLoughlin Middle School - Friday Food Bags Program		No		
29	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 10,000.00	11/14/2018	Support the construction of a youth, indoor multi-use facility at NMHS.		No		
30	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 4,200.00	5/15/2019	Support the Hanby Middle School - Robotics, Engineering and Discovery Room (RED Room)		No		
31	Jacksonville Boosters Foundation, Inc. P.O. Box 1061 Jacksonville, OR	\$ 5,000.00	5/15/2019	Support the "Path through Time" project		No		
32	Jacksonville Engine Company #1 P.O. Box 313 Jacksonville, OR	\$ 9,179.10	5/15/2019	Support the purchase of structure fire turnout gear		No		
33	Joe's Place Ministries PO Box 1226 Grants Pass, OR	\$ 4,800.00	5/15/2019	Support the work of Joe's Place in Grants Pass and Cave Junction		No		
34	Josephine County 301 NW F Street Grants Pass, OR	\$ 5,000.00	11/14/2018	Support the Josephine County Fairgrounds Commercial Kitchen Revival Project		No		
35	Josephine County Foundation (JCF) P.O. Box 673 Murphy, OR	\$ 5,000.00	5/15/2019	Support the Students Acquiring Firefighter Equipment project		No		
36	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	\$ 10,000.00	5/15/2019	Support the Holly Theatre Restoration Project		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-19

**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
37	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 5,000.00	5/15/2019	Support the Filling the Gap through After-School Programming project		No		
38	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 272.15	7/23/2018	Processing of donated meat		No		
39	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 2,000.00	11/19/2018	Support the Thanksgiving and Christmas food distribution programs		No		
40	Klamath Lutheran Church 1175 Crescent Ave Klamath Falls, OR	\$ 3,000.00	5/15/2019	Support the (KU) Weekend Food Bags		No		
41	Logos Public Charter School 400 Earhart St. Medford, OR	\$ 9,700.00	5/15/2019	Support the musical instruments project		No		
42	Medford American- Little League Baseball P.O. Box 4059 Medford, OR	\$ 10,000.00	5/15/2019	Support the purchase of dugout covers for the newly renovated baseball fields		No		
43	North Valley Knights Booster Club Grants Pass, OR	\$ 1,210.00	3/19/2019	Support the North Valley High School Sparrow program		No		
44	Peace House P.O. Box 524 Ashland, OR	\$ 1,500.00	5/15/2019	Support the Uncle Food's Diner program		No		
45	Peter Britt Gardens Music and Arts Festival Association P.O. Box 1124 Medford, OR	\$ 6,906.00	10/5/2018	Support the purchase of a Production Truck		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-19

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

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

	Name and Address of Grantee	Amount of Grant	Date of Grant	Purpose of Grant	Amounts Expended by Grantee	To the Grantor's Knowledge, Grantee Has Diverted a Portion of Funds from the Grant (Yes/No)	Dates of Reports Received from Grantee	Dates and Results of any Verification of the Grantee's Reports
<b>46</b>	Red Rock Cowboy Church - Hope Ranch 17153 Antioch Road White City, OR	\$ 8,000.00	11/19/2018	Support the work of Hope Ranch		No		
<b>47</b>	Rogue Powerpack Charitable Foundation PO 8369 Medford, OR	\$ 7,000.00	5/15/2019	Support the Rogue Powerpack program		No		
<b>48</b>	Rogue Valley Council of Government 155 N. First St. Central Point, OR	\$ 7,946.00	12/12/2166	Support the purchase a commercial refrigerator, freezer and gas range for our new senior meal site in Grants		No		
<b>49</b>	Rogue Valley Foundation 101 e. 8th Street Medford, OR	\$ 3,000.00	5/15/2019	Support the fence and onsite laundry facility project at the Community Works Transitional Living Program		No		
<b>50</b>	Ross Ragland Theater 218 N 7th Street Klamath Falls, OR	\$ 4,000.00	5/15/2019	Support the Arts Education and Outreach Program		No		
<b>51</b>	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR	\$ 4,000.00	5/15/2019	Support the equipment and the irrigation system at Sanctuary One care farm		No		
<b>52</b>	Southern Oregon Humane Society 2910 Table Rock Rd Medford, OR	\$ 5,000.00	5/15/2019	Support the adoption center floor upgrade project		No		
<b>53</b>	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	\$ 4,060.00	5/15/2019	Support the Sparrow program in underfunded schools.		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-19

**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
54	Spartan Boxing Club 729 Welch St. Medford, OR	\$ 8,000.00	5/15/2019	Support the work of the Spartan Boxing program		No		
55	United Way of Jackson County 60 Hawthorne Street Medford, OR	\$ 1,500.00	11/14/2018	Sponsorship support of the 2019 ONLC		No		
56	Upper Rogue Cal Ripken PO Box 126 Eagle Point, OR	\$ 5,000.00	5/15/2019	Support the purchase of a Tractor for use at the fields		No		
57	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	\$ 5,000.00	11/14/2018	General operating support of the Walking Tall program		No		
58	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	\$ 5,000.00	5/15/2019	Support the Phase II Building #3 Expansion		No		
59	Wildlife Images Rehabilitation & Education Center P.O. 36 Merlin, OR	\$ 3,000.00	5/15/2019	Support the completion of the Eagle and Large Raptor Conditioning Facility		No		
60	Women's Crisis Support Team 560 NE F St. A430 Grants Pass, OR	\$ 2,800.00	5/15/2019	Support the public office exterior renovation and restoration project		No		
	<b>TOTAL PAID DURING THIS YEAR</b>	<b>\$ 339,474.25</b>						

## STATEMENT S226

PBC

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

Organization West Family Foundation  
TIN 20-4720365  
Tax Year Ended 31-May-19

## 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	American Sewing Guild, S.O Chapter 2250 Crater Lake Ave #8 Medford, OR	N/A	Public Charity	Support the community service programs of the ASG Southern Oregon Chapter	\$ 2,505 00
2	Asante Foundation 2600 Siskiyou Blvd. Medford, OR	N/A	Public Charity	To assist with the purchasing of the furniture for the group room in the Behavioral Health Initiative	\$ 6,000 00
3	Butte Creek Mill Foundation PO Box 957 Eagle Point, OR	N/A	Public Charity	Support the rebuilding and restoration of the Butte Creek Mill and Ice House	\$ 5,000 00
4	Calvary Church, Jacksonville P O Box 117 Jacksonville, OR	N/A	Church	Support the youth programs at Calvary Church	\$ 1,500 00
5	CASA of Jackson County, Inc 409 N Front Street Medford, OR	N/A	Public Charity	Support the dual county CASA library program	\$ 3,000.00
	Central Curry School District #1 29516 Ellensburg Ave Gold Beach, OR	N/A	Government	Support Gold Beach High School (GBHS) Career Pathway in Digital Arts Media project	\$ 4,200 00
7	County of Jackson Phoenix School Dist. #4 745 N. Rose St Phoenix, OR	N/A	Government	Support the purchase of cheer mats at Phoenix High School	\$ 2,000 00
8	Crater Foundation PO Box 5172 Central Point, OR	N/A	Public Charity	Support the purchase & Installation of a new Scoreboard at the Crater High School Track & Field Complex	\$ 4,000 00
9	Divide Camp, Inc PO Box 49 Joseph, OR	N/A	Public Charity	Support the work of Divide Camp	\$ 6,000.00
10	Divide Camp, Inc. PO Box 49 Joseph, OR	N/A	Public Charity	Support the healing wounded veterans through wilderness adventures project	\$ 9,465.00
11	Dogs for Better Lives (formerly Dogs for the Deaf) 10175 Wheeler Road Central Point, OR	N/A	Public Charity	Support the community tour experience	\$ 5,000.00
12	Faith House 220 NW A Street Grant Pass, OR	N/A	Public Charity	Support the electrical & plumbing safety upgrades at the Faith House	\$ 5,000 00
13	Familia Unida 8089 Abbey Road White City, OR	N/A	Public Charity	Support the Familia Unida bike program	\$ 5,000 00
14	Friends of Josephine County Food Bank Network PO Box 2363 Grants Pass, OR	N/A	Public Charity	Support the purchase of a battery powered three-wheeled forklift for use in the warehouse at the Josephine	\$ 3,000 00
15	Friends of the Fair Foundation 3551 E Barnett Road, Ste 105 Medford, OR	N/A	Public Charity	Support the purchase of Big Ass fans in the Ulsrud Arena for use at the Junior Livestock Auction and other	\$ 5,000.00

## Form 990-PF, Part XV, Line 3a

<div>Recipient</div> <div>Name and Address (home or business)</div>	<div>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</div>	<div>Foundation status of recipient</div>	<div>Purpose of grant or contribution</div>	<div>Amount</div>
16 Grace Point Christian Fellowship P O. Box 1133 Medford, OR	N/A	Church	Support the ROC Recovery Center Mobile Outreach/Start Up program	\$ 5,000 00
17 Grants Pass School District #7 725 NE Dean Drive Grants Pass, OR	N/A	Government	Support the construction of an outdoor basketball court with 6 hoops at GPHS	\$ 5,000 00
18 Hearts With A Mission 521 Edwards Medford, OR	N/A	Public Charity	Support the purchase of property	\$ 50,000 00
19 Illinois River Valley Arts Council P.O. Box 522 Cave Junction, OR	N/A	Public Charity	Support the Lorna Byrne Middle School learning through the arts program	\$ 3,510 00
20 Jackson County 4H & FFA Junior Livestock 12100 Agate Road Eagle Point, OR	N/A	Public Charity	Support the 2018 Junior Livestock Auction at the Jackson County Fair	\$ 3,445 00
21 Jackson County Fair Board 1 Peninger Rd Central Point, OR	N/A	Government	Support the Kids 12 & under free sponsorship program at the 2018 Jackson County Summer Fair	\$ 15,000.00
22 Jackson County School District 549C 815 S.Oakdale Medford, OR	N/A	Government	Support the purchase and installation of a new playground for the kindergartners and younger students	\$ 8,731 00
23 Jackson County School District 549C 815 S.Oakdale Medford, OR	N/A	Government	Scholarships for NMHS Graduating Seniors	\$ 7,500 00
Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Government	Support the Washington Elementary Mobile Library Program	\$ 1,500 00
25 Jackson County School District 549C 815 S.Oakdale Medford, OR	N/A	Government	Support of the e North Medford Storm AAU Boys Basketball Team	\$ 125 00
26 Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Government	Support the NMHS - Color Guard Equipment Bags	\$ 920 00
27 Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Government	Support the Winter Wishes program at North Medford High School	\$ 2,000 00
28 Jackson County School District 549C 815 S Oakdale Medford, OR	N/A	Government	Support the McLoughlin Middle School - Friday Food Bags Program	\$ 4,000 00
29 Jackson County School District 549C 815 S.Oakdale Medford, OR	N/A	Government	Support the construction of a youth, indoor multi-use facility at NMHS.	\$ 10,000 00
30 Jackson County School District 6 300 Ash Street Central Point, OR	N/A	Government	Support the Hanby Middle School - Robotics, Engineering and Discovery Room (RED Room)	\$ 4,200.00
31 Jacksonville Boosters Foundation, Inc P.O. Box 1061 Jacksonville, OR	N/A	Public Charity	Support the "Path through Time" project	\$ 5,000 00
32 Jacksonville Engine Company #1 P.O Box 313 Jacksonville, OR	N/A	Public Charity	Support the purchase of structure fire turnout gear	\$ 9,179.10
33 Joe's Place Ministries PO Box 1226 Grants Pass, OR	N/A	Public Charity	Support the work of Joe's Place in Grants Pass and Cave Junction	\$ 4,800 00
34 Josephine County 301 NW F Street Grants Pass, OR	N/A	Government	Support the Josephine County Fairgrounds Commercial Kitchen Revival Project	\$ 5,000 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
35	Josephine County Foundation (JCF) P O Box 673 Murphy, OR	N/A	Public Charity	Support the Students Acquiring Firefighter Equipment project	\$ 5,000 00
36	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	N/A	Public Charity	Support the Holly Theatre Restoration Project	\$ 10,000 00
37	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	Public Charity	Support the Filling the Gap through After-School Programming project	\$ 5,000 00
38	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	Public Charity	Processing of donated meat	\$ 272 15
39	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	Public Charity	Support the Thanksgiving and Christmas food distribution programs	\$ 2,000 00
40	Klamath Lutheran Church 1175 Crescent Ave Klamath Falls, OR	N/A	Church	Support the (KU) Weekend Food Bags	\$ 3,000 00
41	Logos Public Charter School 400 Earhart St Medford, OR	N/A	Public Charity	Support the musical instruments project	\$ 9,700 00
42	Medford American- Little League Baseball P O Box 4059 Medford, OR	N/A	Public Charity	Support the purchase of dugout covers for the newly renovated baseball fields	\$ 10,000 00
	North Valley Knights Booster Club Grants Pass, OR	N/A	Public Charity	Support the North Valley High School Sparrow program	\$ 1,210 00
44	Peace House P O. Box 524 Ashland, OR	N/A	Public Charity	Support the Uncle Food's Diner program	\$ 1,500 00
45	Peter Britt Gardens Music and Arts Festival P O. Box 1124 Medford, OR	N/A	Public Charity	Support the purchase of a Production Truck	\$ 6,906.00
46	Red Rock Cowboy Church - Hope Ranch 17153 Antioch Road White City, OR	N/A	Church	Support the work of Hope Ranch	\$ 8,000.00
47	Rogue Powerpack Charitable Foundation PO 8369 Medford, OR	N/A	Public Charity	Support the Rogue Powerpack program	\$ 7,000.00
48	Rogue Valley Council of Government 155 N. First St Central Point, OR	N/A	Government	Support the purchase a commercial refrigerator, freezer and gas range for our new senior meal site in Grants	\$ 7,946 00
49	Rogue Valley Foundation 101 e 8th Street Medford, OR	N/A	Public Charity	Support the fence and onsite laundry facility project at the Community Works Transitional Living Program	\$ 3,000 00
50	Ross Ragland Theater 218 N 7th Street Klamath Falls, OR	N/A	Public Charity	Support the Arts Education and Outreach Program	\$ 4,000 00
51	Sanctuary One 13195 Upper Applegate Road Jacksonville, OR	N/A	Public Charity	Support the equipment and the irrigation system at Sanctuary One care farm	\$ 4,000 00
52	Southern Oregon Humane Society 2910 Table Rock Rd Medford, OR	N/A	Public Charity	Support the adoption center floor upgrade project	\$ 5,000 00

## Form 990-PF, Part XV, Line 3a

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and Address (home or business)					
53	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	N/A	Public Charity	Support the Sparrow program in underfunded schools	\$ 4,060 00
54	Spartan Boxing Club 729 Welch St Medford, OR	N/A	Public Charity	Support the work of the Spartan Boxing program	\$ 8,000 00
55	United Way of Jackson County 60 Hawthorne Street Medford, OR	N/A	Public Charity	Sponsorship support of the 2019 ONLC	\$ 1,500 00
56	Upper Rogue Cal Ripken PO Box 126 Eagle Point, OR	N/A	Public Charity	Support the purchase of a Tractor for use at the fields	\$ 5,000 00
57	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	N/A	Public Charity	General operating support of the Walking Tall program	\$ 5,000 00
58	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	N/A	Public Charity	Support the Phase II Building #3 Expansion	\$ 5,000.00
59	Wildlife Images Rehabilitation & Education Center P.O. 36 Merlin, OR	N/A	Public Charity	Support the completion of the Eagle and Large Raptor Conditioning Facility	\$ 3,000.00
60	Women's Crisis Support Team 560 NE F St A430 Grants Pass, OR	N/A	Public Charity	Support the public office exterior renovation and restoration project	\$ 2,800 00
TOTAL PAID DURING THIS YEAR					\$ 339,474.25

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	363,515.	0.	363,515.	363,515.	
TO PART I, LINE 4	363,515.	0.	363,515.	363,515.	

FORM 990-PF RENTAL INCOME STATEMENT 2

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL - JACKSONVILLE OR	1	6,424.
TOTAL TO FORM 990-PF, PART I, LINE 5A		6,424.

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	1,775.	0.		1,775.
TO FM 990-PF, PG 1, LN 16A	1,775.	0.		1,775.

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	5,210.	0.		5,210.
PAYROLL SERVICE	476.	0.		476.
TO FORM 990-PF, PG 1, LN 16B	5,686.	0.		5,686.

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	92,421.	92,421.		0.
TO FORM 990-PF, PG 1, LN 16C	92,421.	92,421.		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	2,182.	0.		2,182.
STATE TAX	976.	0.		976.
FEDERAL TAXES	10,969.	0.		10,969.
FOREIGN TAXES	1,781.	1,781.		0.
TO FORM 990-PF, PG 1, LN 18	15,908.	1,781.		14,127.

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	1,557.	0.		1,557.
INSURANCE	1,251.	0.		1,251.
MISCELLANEOUS	416.	0.		416.
OFFICE EXPENSE	473.	0.		473.
TRAINING	1,748.	0.		1,748.
SUPPLIES	885.	0.		885.
UTILITIES	2,421.	0.		2,421.
SOFTWARE UPGRADE	5,800.	0.		5,800.
MARKETING	2,835.	0.		2,835.
TO FORM 990-PF, PG 1, LN 23	17,386.	0.		17,386.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES	5,122,092.	6,244,285.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,122,092.	6,244,285.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
-------------	--------------	-----------	---

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CWF PROPERTIES	225,710.	217,133.	262,785.
DUE FROM CHANEY FOUNDATION	40,897.	41,301.	41,301.
TO FORM 990-PF, PART II, LINE 15	266,607.	258,434.	304,086.

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

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.