

EXTENDED TO APRIL 15, 2021  
Return of Private Foundation

2949125401004 1

Form 990-PF

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. 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning JUN 1, 2019, and ending MAY 31, 2020

Name of foundation: **WEST FAMILY FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **680 G STREET, SUITE B**

Room/suite:

City or town, state or province, country, and ZIP or foreign postal code: **JACKSONVILLE, OR 97530**

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16): **\$ 8,672,109.**

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) **04**

A Employer identification number: **20-4720365**

B Telephone number: **541-899-9976**

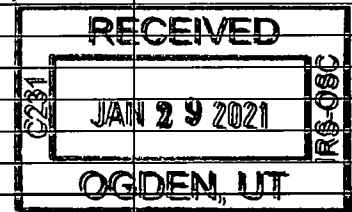
C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐  
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	277,862.	277,862.		STATEMENT 1
	5a Gross rents	13,385.	13,385.		STATEMENT 2
	b Net rental income or (loss) 13,385.				
	6a Net gain or (loss) from sale of assets not on line 10	29,920.			
	b Gross sales price for all assets on line 6a 4,141,401.				
	7 Capital gain net income (from Part IV, line 2)		29,920.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	321,167.	321,167.		
	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages	49,500.	0.		49,500.
	15 Pension plans, employee benefits	3,167.	0.		3,167.
	16a Legal fees STMT 3	1,360.	0.		1,360.
	b Accounting fees STMT 4	5,539.	0.		5,539.
	c Other professional fees STMT 5	92,060.	92,060.		0.
	17 Interest				
	18 Taxes STMT 6	6,792.	1,383.		5,409.
	19 Depreciation and depletion				
	20 Occupancy	10,254.	0.		10,254.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	4,319.	0.		4,319.
	24 Total operating and administrative expenses Add lines 13 through 23	172,991.	93,443.		79,548.
	25 Contributions, gifts, grants paid	147,883.			147,883.
	26 Total expenses and disbursements Add lines 24 and 25	320,874.	93,443.		227,431.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	293.			
	b Net investment income (if negative, enter -0-)		227,724.		
	c Adjusted net income (if negative, enter -0-)			N/A	



g26

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	2,248,564.	342,720.	342,720.
	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 9	5,122,092.	7,026,098.	8,023,172.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 10)		258,434.	260,565.	306,217.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		7,629,090.	7,629,383.	8,672,109.
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 FASB ASC 958, check here ▶ <input type="checkbox"/>			
	and complete lines 24, 25, 29, and 30			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 26 through 30			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
28 Retained earnings, accumulated income, endowment, or other funds	7,629,090.	7,629,383.		
29 Total net assets or fund balances	7,629,090.	7,629,383.		
30 Total liabilities and net assets/fund balances	7,629,090.	7,629,383.		

## 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 29 (must agree with end-of-year figure reported on prior year's return)	1	7,629,090.
2 Enter amount from Part I, line 27a	2	293.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,629,383.
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 29	6	7,629,383.

**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 STATEMENT			
<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> 4,141,401.		4,111,481.	29,920.

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	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			29,920.

<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 }	<b>2</b>	29,920.
<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	{ }	<b>3</b>	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))
2018	434,654.	8,473,590.	.051295
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

<b>2</b> Total of line 1, column (d)	<b>2</b>	.248716
<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	<b>3</b>	.049743
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	<b>4</b>	8,732,896.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	434,400.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	2,277.
<b>7</b> Add lines 5 and 6	<b>7</b>	436,677.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	227,431.

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 #3930	P		
b	SEE ATTACHED #1344	P		
c	SEE ATTACHED #1344	P		
d	SEE ATTACHED #7924	P		
e	SEE ATTACHED #7924	P		
f	SEE ATTACHED #9402	P		
g	SEE ATTACHED #9402	P		
h	SEE ATTACHED #9948	P		
i	SEE ATTACHED #9948	P		
j	SEE ATTACHED #1339	P		
k	SEE ATTACHED #1339	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	112,851.	105,651.	7,200.
b	403,482.	402,183.	1,299.
c	26,581.	26,381.	200.
d	12,466.	17,743.	-5,277.
e	93,886.	110,142.	-16,256.
f	12,424.	21,825.	-9,401.
g	45,439.	29,120.	16,319.
h	19,167.	21,296.	-2,129.
i	220,250.	140,901.	79,349.
j	2,036,542.	2,189,179.	-152,637.
k	808,381.	745,533.	62,848.
l	18,540.	18,378.	162.
m	100,393.	99,913.	480.
n	106,011.	108,200.	-2,189.
o	124,988.	75,036.	49,952.

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			7,200.
b			1,299.
c			200.
d			-5,277.
e			-16,256.
f			-9,401.
g			16,319.
h			-2,129.
i			79,349.
j			-152,637.
k			62,848.
l			162.
m			480.
n			-2,189.
o			49,952.

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	29,920.
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	4,554.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)		3	4,554.
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	4,554.
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 2019 estimated tax payments and 2018 overpayment credited to 2019	6a 3,200.	7	3,200.
b Exempt foreign organizations - tax withheld at source	6b 0.	8	0.
c Tax paid with application for extension of time to file (Form 8868)	6c 0.	9	1,354.
d Backup withholding erroneously withheld	6d 0.	10	
7 Total credits and payments Add lines 6a through 6d		11	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 11			
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax Refunded			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 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. OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? 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

**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 2019, 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 2019?	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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.) 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 2019?	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 ☒ 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.

X

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

☐ Yes ☒ No

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

N/A

7b

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

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**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."

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

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

0

**Part IX-A** Summary of Direct Charitable Activities

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

	Expenses
1 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
1 N/A	
2	
All other program-related investments. See instructions	
3	

Total. Add lines 1 through 3

0.

Form 990-PF (2019)



**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>	8,108,244.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	452,489.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	305,151.
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	8,865,884.
<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>	8,865,884.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	132,988.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	8,732,896.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	436,645.

**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>	436,645.
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	4,554.
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	4,554.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	432,091.
<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>	432,091.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	432,091.

**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>	227,431.
<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>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	<b>4</b>	227,431.
<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>	0.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	227,431.

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

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

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
<b>1</b> Distributable amount for 2019 from Part XI, line 7				432,091.
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only			52,174.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2019:				
<b>a</b> From 2014				
<b>b</b> From 2015				
<b>c</b> From 2016				
<b>d</b> From 2017				
<b>e</b> From 2018				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ► \$ 227,431.				
<b>a</b> Applied to 2018, but not more than line 2a			52,174.	
<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 2019 distributable amount				175,257.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2019 (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 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				256,834.
<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 2014 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015				
<b>b</b> Excess from 2016				
<b>c</b> Excess from 2017				
<b>d</b> Excess from 2018				
<b>e</b> Excess from 2019				



**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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)				
<b>a Paid during the year</b>				
SEE ATTACHED STATEMENT	NONE	SEE ATTACHED STATEMENT	SEE ATTACHED STATEMENT	147,883.
<b>Total</b>			<b>3a</b>	147,883.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	0.





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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DA DAVIDSON	277,862.	0.	277,862.	277,862.	
TO PART I, LINE 4	277,862.	0.	277,862.	277,862.	

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FORM 990-PF	RENTAL INCOME	STATEMENT	2
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KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
COMMERCIAL - JACKSONVILLE OR	1	13,385.
TOTAL TO FORM 990-PF, PART I, LINE 5A		13,385.

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FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	1,360.	0.		1,360.
TO FM 990-PF, PG 1, LN 16A	1,360.	0.		1,360.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,980.	0.		4,980.
PAYROLL SERVICE	559.	0.		559.
TO FORM 990-PF, PG 1, LN 16B	5,539.	0.		5,539.

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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	92,060.	92,060.			0.
TO FORM 990-PF, PG 1, LN 16C	92,060.	92,060.			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	4,971.	0.			4,971.
STATE TAX	963.	0.			963.
FEDERAL TAXES	-525.	0.			-525.
FOREIGN TAXES	1,383.	1,383.			0.
TO FORM 990-PF, PG 1, LN 18	6,792.	1,383.			5,409.

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	1,032.	0.			1,032.
INSURANCE	1,335.	0.			1,335.
MISCELLANEOUS	1,017.	0.			1,017.
OFFICE EXPENSE	201.	0.			201.
PUBLIC RELATIONS	734.	0.			734.
TO FORM 990-PF, PG 1, LN 23	4,319.	0.			4,319.



FORM 990-PF

REASONABLE CAUSE FOR LATE FILING

STATEMENT

8

TECHNICALLY THE RETURN IS NOT FILED LATE. SEPTEMBER 2020 PRESIDENT TRUMP DECLARED PARTS OF OREGON AS A DISASTER AREA. JACKSON COUNTY IS ONE OF THOSE AREAS AS A RESULT OF THE ALAMEDA FIRE. AS A RESULT OF THIS DECLARATION, THE TAX RETURN THAT WOULD NORMALLY BE DUE ON OCTOBER 15, 2020 BECAME DUE ON JANUARY 15, 2021. ON JANUARY 15, 2021 THIS RETURN WAS EXTENDED. HOWEVER, THERE ARE NO PLACES ON THE RETURN TO INDICATE THIS SCENARIO SO THIS REASONABLE CAUSE STATEMENT IS ATTACHED.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES	7,026,098.	8,023,172.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,026,098.	8,023,172.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CWF PROPERTIES	217,133.	212,518.	258,170.
DUE FROM CHANEY FOUNDATION	41,301.	48,047.	48,047.
TO FORM 990-PF, PART II, LINE 15	258,434.	260,565.	306,217.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT	11
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TAX DUE FROM FORM 990-PF, PART VI	1,354.
LATE PAYMENT INTEREST	11.
TOTAL AMOUNT DUE	1,365.

FORM 990-PF	LATE PAYMENT INTEREST	STATEMENT	12
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DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	10/15/20	1,354.	1,354.	.0300	99	11.
DATE FILED	01/22/21		1,365.			
TOTAL LATE PAYMENT INTEREST						11.

FORM 990-PF

PART XV - LINE 1A  
LIST OF FOUNDATION MANAGERS

STATEMENT 13

NAME OF MANAGER

STEVEN WEST  
CAROLYN WEST

FORM 990-PF

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

STATEMENT 14

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NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

---

TELEPHONE NUMBER

---

541-899-9976

---

EMAIL ADDRESS

---

CHANSON.FAMILYFOUNDATION@GMAIL.COM

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FORM AND CONTENT OF APPLICATIONS

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INTERNET APPLICATION FORM FOUND ON WEBSITE  
WWW.FAMILYFOUNDATIONWEST.ORG

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ANY SUBMISSION DEADLINES

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THE LAST BUSINESS DAY IN FEBRUARY AND AUGUST

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RESTRICTIONS AND LIMITATIONS ON AWARDS

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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.

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## STATEMENT S226

## Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 22I)

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

## 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	AAU - Subordinate Org Name- The LAB 73 Fairway Circle Medford, OR	N/A	PC	Support The LAB's scholarship program	\$ 2,000 00
2	Calvary Church, Jacksonville P.O. Box 117 Jacksonville, OR	N/A	PC	Provide \$1,000 for the KidZone Curriculum at Church and \$5,000 for the Africa's Hope Project	\$ 6,000 00
3	David's Chair Outdoor Mobility Systems 535 Sunrise Avenue Medford, OR	N/A	PC	Support the purchase of a mobility chair	\$ 15,000 00
4	Divide Camp, Inc P.O. Box 49 Joseph, OR	N/A	PC	Support the Healing Wounded Veterans through Wilderness Excursions	\$ 10,000.00
5	Graces Hope 1438 Yellowstone Ave Medford, OR	N/A	PC	Run with Grace Title Sponsor	\$ 5,000.00
6	Habitat for Humanity/Rogue Valley P.O. Box 688 Medford, OR	N/A	PC	General Support of Habitat for Humanity	\$ 10,000.00
7	Hearts With A Mission 711 Medford Center #334 Medford, OR	N/A	PC	Furniture for the new shelter program	\$ 1,000 00
8	Hope Ranch Youth Program, Inc 17153 Antioch Road White City, OR	N/A	PC	Provide scholarships for youth to participate in Summer Programs	\$ 5,000 00
9	Jackson County 4H & FFA Junior Livestock Auction Committee 12100 Agate Road Eagle Point, OR	N/A	PC	Support the 2019 Junior Livestock Auction at the Jackson County Fair	\$ 4,788 00
10	Jackson County Fair Board P.O. 3635 Central Point, OR	N/A	Gov	Kids 12 & Under Free to the 2019 Jackson County Fair	\$ 15,000.00
11	Jackson County School District 549C 815 S.Oakdale Medford, OR	N/A	Gov	Support the purchase of new cheer team uniforms	\$ 8,250 00
12	Jackson County School District 6 300 Ash Street Central Point, OR	N/A	Gov	Crater Comet Mascot Project	\$ 4,575.00
13	Jackson County Sheriff's Office 5179 Crater Lake Hwy Central Point, OR	N/A	Gov	Support the purchase of multi camera systems for the Unmanned Aerial Vehicle Program	\$ 4,500 00
14	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	N/A	PC	Support the Holly Restoration efforts	\$ 10,000 00
15	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	PC	Pay for the cut, kill and wrap fees for the hog purchased at the 2019 Summer Jackson County Fair Swine	\$ 270 05

## 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)					
16	Kids Unlimited of Oregon 821 North Riverside Medford, OR	N/A	PC	Support the Thanksgiving & Christmas food distribution programs	\$ 2,000.00
17	Oregon High School Equestrian Teams Inc 1929 Ne Walnut Dr Redmond, OR	N/A	PC	Sponsorship support of the Mt. View High School Equestrian Team	\$ 500 00
18	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Medford, OR	N/A	PC	Provide support to the 2020 Britt Festival Orchestra cancelled season support fund	\$ 10,000 00
19	Spay Neuter Your Pets (SNYPS) P.O. Box 477 Medford, OR	N/A	PC	Support the work of SNYPS	\$ 2,500 00
20	United Way of Jackson County 60 Hawthorne Street Medford, OR	N/A	PC	Sponsorship support of the 2020 ONLC	\$ 1,500 00
21	Walking Tall Southern Oregon P O Box 3789 Central Point, OR	N/A	PC	Provide general operating support of the Walking Tall program	\$ 10,000.00
22	Youth 71Five Ministries 529 Edwards St. Medford, OR	N/A	PC	Support the construction and renovations for the vocational training & transitional housing center	\$ 20,000 00
TOTAL PAID DURING THIS YEAR					\$ 147,883 05

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

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

**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 an Verification of the Grantee's Reports
1	AAU - Subordinate Org. Name- The LAB 73 Fairway Circle Medford, OR	\$ 2,000.00	5/31/2020	Support The LAB's scholarship program		No		
2	Calvary Church, Jacksonville P O Box 117 Jacksonville, OR	\$ 6,000.00	5/31/2020	Provide \$1,000 for the KidZone Curriculum at Church and \$5,000 for the Africa's Hope Project		No		
3	David's Chair Outdoor Mobility Systems 535 Sunrise Avenue Medford, OR	\$ 15,000.00	5/31/2020	Support the purchase of a mobility chair		No		
4	Divide Camp, Inc P.O. Box 49 Joseph, OR	\$ 10,000.00	5/31/2020	Support the Healing Wounded Veterans through Wilderness Excursions		No		
5	Graces Hope 1438 Yellowstone Ave Medford, OR	\$ 5,000.00	5/31/2020	Run with Grace Title Sponsor		No		
6	Habitat for Humanity/Rogue Valley P O Box 688 Medford, OR	\$ 10,000.00	5/31/2020	General Support of Habitat for Humanity		No		
7	Hearts With A Mission 711 Medford Center #334 Medford, OR	\$ 1,000.00	5/31/2020	Furniture for the new shelter program		No		
8	Hope Ranch Youth Program, Inc 17153 Antioch Road White City, OR	\$ 5,000.00	5/31/2020	Provide scholarships for youth to participate in Summer Programs		No		
9	Jackson County 4H & FFA Junior Livestock 12100 Agate Road Eagle Point, OR	\$ 4,788.00	5/31/2020	Support the 2019 Junior Livestock Auction at the Jackson County Fair		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-20

**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 an Verification of the Grantee's Reports
10	Jackson County Fair Board P.O. 3635 Central Point, OR	\$ 15,000.00	6/1/2019	Kids 12 & Under Free to the 2019 Jackson County Fair		No		
11	Jackson County School District 549C 815 S.Oakdale Medford, OR	\$ 8,250.00	5/31/2020	Support the purchase of new cheer team uniforms		No		
12	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 4,575.00	5/31/2020	Crater Comet Mascot Project		No		
13	Jackson County Sheriff's Office 5179 Crater Lake Hwy Central Point, OR	\$ 4,500.00	5/31/2020	Support the purchase of multi camera systems for the Unmanned Aerial Vehicle Program		No		
14	JPR Foundation (Holly Theater) 1250 Siskiyou Blvd Ashland, OR	\$ 10,000.00	5/31/2020	Support the Holly Restoration efforts		No		
15	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 270.05	5/31/2020	Pay for the cut, kill and wrap fees for the hog purchased at the 2019 Summer Jackson County Fair Swine		No		
16	Kids Unlimited of Oregon 821 North Riverside Medford, OR	\$ 2,000.00	5/31/2020	Support the Thanksgiving & Christmas food distribution programs		No		
17	Oregon High School Equestrian Teams Inc 1929 Ne Walnut Dr Redmond, OR	\$ 500.00	5/31/2020	Sponsorship support of the Mt View High School Equestrian Team		No		
18	Peter Britt Gardens Music and Arts Festival P.O. Box 1124 Medford, OR	\$ 10,000.00	5/31/2020	Provide support to the 2020 Britt Festival Orchestra cancelled season support fund.		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-20

**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	Spay Neuter Your Pets (SNYPS) P.O. Box 477 Medford, OR	\$ 2,500.00	5/31/2020	Support the work of SNYPS		No		
20	United Way of Jackson County 60 Hawthorne Street Medford, OR	\$ 1,500.00	5/31/2020	Sponsorship support of the 2020 ONLC		No		
21	Walking Tall Southern Oregon P.O. Box 3789 Central Point, OR	\$ 10,000.00	5/31/2020	Provide general operating support of the Walking Tall program		No		
22	Youth 71Five Ministries 529 Edwards St. Medford, OR	\$ 20,000.00	6/30/2019	Support the construction and renovations for the vocational training & transitional housing center		No		
<b>TOTAL PAID DURING THIS YEAR</b>		<b>\$ 147,883.05</b>						