

EXTENDED TO APRIL 15, 2021
Return of Private Foundation

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

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
ROBERT AND FRANCES CHANEY FAMILY FOUNDATION

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

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

G Check all that apply:
☐ Initial return
☐ Final return
☐ Address change
☐ Initial return of a former public charity
☐ Amended return
☐ 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)
\$ 8,504,230.

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

A Employer identification number
20-5052365

B Telephone number
541-899-9199

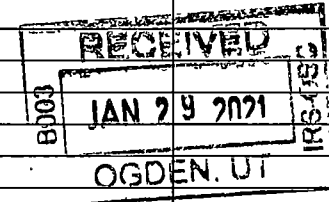
C If exemption application is pending, check here ☐

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

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

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	-		N/A	
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	269,742.	269,742.		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	78,025.			
	b Gross sales price for all assets on line 6a	2,591,915.			
	7 Capital gain net income (from Part IV, line 2)		78,025.		
	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	361,152.	361,152.			
Operating and Administrative Expenses	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	2,831.	0.		2,831.
	b Accounting fees STMT 4	5,539.	0.		5,539.
	c Other professional fees STMT 5	89,857.	89,857.		0.
	17 Interest				
	18 Taxes STMT 6	2,779.	1,170.		1,609.
	19 Depreciation and depletion				
	20 Occupancy	8,030.	0.		8,030.
	21 Travel, conferences, and meetings	6,072.	0.		6,072.
	22 Printing and publications				
	23 Other expenses STMT 7	8,701.	0.		8,701.
	24 Total operating and administrative expenses Add lines 13 through 23	176,476.	91,027.		85,449.
	25 Contributions, gifts, grants paid	379,245.			379,245.
26 Total expenses and disbursements Add lines 24 and 25	555,721.	91,027.		464,694.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-194,569.				
b Net investment income (if negative, enter -0-)		270,125.			
c Adjusted net income (if negative, enter -0-)			N/A		



**ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION**

Form 990-PF (2019)

20-5052365 Page 2

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	1,643,574.	150,507.	150,507.
	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	6,013,405.	7,323,264.	8,095,552.
	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)		217,131.	212,516.	258,171.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		7,874,110.	7,686,287.	8,504,230.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 11)	41,301.	48,047.	
23 Total liabilities (add lines 17 through 22)	41,301.	48,047.		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒			
	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	7,832,809.	7,638,240.	
	29 Total net assets or fund balances	7,832,809.	7,638,240.	
30 Total liabilities and net assets/fund balances	7,874,110.	7,686,287.		

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	7,832,809.
2 Enter amount from Part I, line 27a	2	-194,569.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	7,638,240.
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	7,638,240.

Form 990-PF (2019)

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 DETAIL ATTACHED #7259	P		
b	SEE DETAIL ATTACHED #7259	P		
c	SEE DETAIL ATTACHED #7240	P		
d	SEE DETAIL ATTACHED #7240	P		
e	SEE DETAIL ATTACHED #7730	P		
f	SEE DETAIL ATTACHED #7730	P		
g	SEE DETAIL ATTACHED #6968	P		
h	SEE DETAIL ATTACHED #6968	P		
i	SEE DETAIL ATTACHED #0169	P		
j	SEE DETAIL ATTACHED #0169	P		
k	SEE DETAIL ATTACHED #4001	P		
l	SEE DETAIL ATTACHED #4001	P		
m	SEE DETAIL ATTACHED #3823	P		
n	SEE DETAIL ATTACHED #3823	P		
o	SEE DETAIL ATTACHED #3823	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	159,456.		161,748.	-2,292.
b	39,472.		17,804.	21,668.
c	199,311.		198,261.	1,050.
d	193,681.		193,918.	-237.
e	693,991.		672,886.	21,105.
f	203,934.		192,300.	11,634.
g	3,527.		4,085.	-558.
h	424,748.		379,379.	45,369.
i	10,304.		14,623.	-4,319.
j	81,058.		100,722.	-19,664.
k	8,322.		11,337.	-3,015.
l	120,244.		97,219.	23,025.
m	334,270.		336,468.	-2,198.
n	118,101.		131,644.	-13,543.
o	1,496.		1,496.	0.

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			-2,292.
b			21,668.
c			1,050.
d			-237.
e			21,105.
f			11,634.
g			-558.
h			45,369.
i			-4,319.
j			-19,664.
k			-3,015.
l			23,025.
m			-2,198.
n			-13,543.
o			0.

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	78,025.
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

**ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION**

Form 990-PF (2019)

20-5052365 Page 3

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e 2,591,915.		2,513,890.	78,025.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			78,025.

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	78,025.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	443,851.	8,807,957.	.050392
2017	439,916.	8,868,662.	.049603
2016	375,280.	8,358,027.	.044901
2015	382,301.	8,193,245.	.046661
2014	454,688.	8,788,101.	.051739

2 Total of line 1, column (d)	2	.243296
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.048659
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	8,733,155.
5 Multiply line 4 by line 3	5	424,947.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,701.
7 Add lines 5 and 6	7	427,648.
8 Enter qualifying distributions from Part XII, line 4	8	464,694.

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.

3
**ROBERT AND FRANCES CHANEY FAMILY
 FOUNDATION**

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	2,701.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)	2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	3	2,701.
3 Add lines 1 and 2	4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	5	2,701.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	6a	3,500.
6 Credits/Payments:	6b	0.
a 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld	6c	0.
	6d	0.
7 Total credits and payments. Add lines 6a through 6d	7	3,500.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	799.
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax 799. Refunded	11	0.

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?	1a		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.	1b		X
c Did the foundation file Form 1120-POL for this year?	1c		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.	2		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	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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?	6	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	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <u>OR</u>			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

**ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION**

Form 990-PF (2019)

20-5052365

Page 5

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	11	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	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.FAMILYFOUNDATIONCHANEY.ORG</u>	13	X
14 The books are in care of ► <u>CARRIE HANSON, EXECUTIVE DIRECTOR</u> Telephone no ► <u>541-899-9199</u> Located at ► <u>PO BOX 840, JACKSONVILLE, OR</u> ZIP+4 ► <u>97530</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 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 ►	16	X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here ► ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? ☐ Yes ☒ No If "Yes," list the years ► _____, _____, _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No b If "Yes," did it have excess business holdings in 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?	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 2019?	4b	X

Form 990-PF (2019)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

N/A

5b

Organizations relying on a current notice regarding disaster assistance, check here

☐

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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

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

☐ Yes ☒ No

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

N/A

7b

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
FRANCES CHANEY	PRESIDENT			
P.O. BOX 840				
JACKSONVILLE, OR 97530	10.00	0.	0.	0.
SUSAN KRAMMER	VICE PRESIDENT			
P.O. BOX 840				
JACKSONVILLE, OR 97530	2.00	0.	0.	0.
ROBIN WHITZEL	SECRETARY/TREASURER			
P.O. BOX 840				
JACKSONVILLE, OR 97530	2.00	0.	0.	0.
JASON ANDERSON	TRUSTEE			
P.O. BOX 1667				
MEDFORD, OR 97501	5.00	0.	0.	0.

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(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)

**ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION**
Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	8,281,806.
b	Average of monthly cash balances	1b	326,170.
c	Fair market value of all other assets	1c	258,171.
d	Total (add lines 1a, b, and c)	1d	8,866,147.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	8,866,147.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	132,992.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,733,155.
6	Minimum investment return. Enter 5% of line 5	6	436,658.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	436,658.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	2,701.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,701.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	433,957.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	433,957.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	433,957.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	464,694.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	464,694.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,701.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	461,993.

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.

**ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION**

Form 990-PF (2019)

20-5052365 Page 9

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				433,957.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			67,099.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 464,694.				
a Applied to 2018, but not more than line 2a			67,099.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				397,595.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				36,362.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

ROBERT AND FRANCES CHANEY FAMILY
FOUNDATION

Form 990-PF (2019)

20-5052365 Page 11

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED SCHEDULE	NONE	SEE ATTACHED SCHEDULE	SEE ATTACHED SCHEDULE	379,245.
Total			3a	379,245.
b Approved for future payment				
NONE				
Total			3b	0.

Form 990-PF (2019)

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations)

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
----------------------	---

[illegible]

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	269,742.	0.	269,742.	269,742.	
TO PART I, LINE 4	269,742.	0.	269,742.	269,742.	

FORM 990-PF	RENTAL INCOME	STATEMENT	2
-------------	---------------	-----------	---

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.

FORM 990-PF	LEGAL FEES	STATEMENT	3
-------------	------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	2,831.	0.		2,831.
TO FM 990-PF, PG 1, LN 16A	2,831.	0.		2,831.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
-------------	-----------------	-----------	---

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

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	89,857.	89,857.			0.
TO FORM 990-PF, PG 1, LN 16C	89,857.	89,857.			0.

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAX EXPENSE	4,971.	0.			4,971.
FEDERAL TAXES	-4,345.	0.			-4,345.
FOREIGN TAXES	1,170.	1,170.			0.
STATE TAXES	983.	0.			983.
TO FORM 990-PF, PG 1, LN 18	2,779.	1,170.			1,609.

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE EXPENSE	1,778.	0.			1,778.
DUES AND SUBSCRIPTIONS	1,152.	0.			1,152.
UTILITIES	2,224.	0.			2,224.
OFFICE EXPENSE	490.	0.			490.
MISCELLANEOUS	2,585.	0.			2,585.
PUBLIC RELATIONS	322.	0.			322.
SUPPLIES	150.	0.			150.
TO FORM 990-PF, PG 1, LN 23	8,701.	0.			8,701.

FORM 990-PF

REASONABLE CAUSE FOR LATE FILING

STATEMENT

8

TECHNICALLY THIS IS NOT BEING FILED LATE. SEPTEMBER 2020 PRESIDENT TRUMP DECLARED CERTAIN AREAS OF OREGON AS A DISASTER ZONE. JACKSON COUNTY WAS PART OF THE DECLARATION DUE TO THE ALAMEDA FIRE WHICH DETROYED VIRTUALLY TWO TOWNS. BY MAKING THIS DECLARATION THE RETURN WHICH WOULD NORMALLY BE DUE ON OCTOBER 15, 2020 BECAME DUE ON JANUARY 15, 2021. A TIMELY FILED EXTENSION WAS MADE ON JANUARY 15, 2021 EXTENDING THIS RETURN TO APRIL 15, 2021. HOWEVER THERE IS NO PLACE ON THE RETURN TO PROPERLY DISCLOSE THESE EVENTS.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SECURITIES	7,323,264.	8,095,552.
TOTAL TO FORM 990-PF, PART II, LINE 10B	7,323,264.	8,095,552.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
-------------	--------------	-----------	----

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN CWF PROPERTIES	217,131.	212,516.	258,171.
TO FORM 990-PF, PART II, LINE 15	217,131.	212,516.	258,171.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	11
-------------	-------------------	-----------	----

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DUE TO WEST FAMILY FOUNDATION	41,301.	48,047.
TOTAL TO FORM 990-PF, PART II, LINE 22	41,301.	48,047.

FORM 990-PF

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

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

TELEPHONE NUMBER

541-899-9199

EMAIL ADDRESS

CHANSON.FAMILYFOUDATION@GMAIL.COM

FORM AND CONTENT OF APPLICATIONS

INTERNET APPLICATION FORM FOUND ON WEBSITE
WWW.FAMILYFOUNDATIONCHANEY.ORG

ANY SUBMISSION DEADLINES

THE LAST BUSINESS DAY IN JANUARY AND JULY

RESTRICTIONS AND LIMITATIONS ON AWARDS

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

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

STATEMENT S226

Contributions, Gifts, and Grants Paid during the Year

(See Key Issue 221)

Organization Robert & Frances Chaney Family Foundation
 TIN 20-5052365
 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	Asante Foundation 2600 Siskiyou Blvd Ste 100 Medford, OR	N/A	PC	Support the Asante Forward Campaign	\$ 5,000 00
2	ACCESS P O Box 4666 Medford, OR	N/A	PC	Support the Fueling Healthy Families project	\$ 3,000 00
3	ACCESS P O Box 4666 Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
4	Addictions Recovery Center, Inc (ARC) 1003 E Main St Suite 104 Medford, OR	N/A	PC	Support the purchase of a van to transport women in the Reddy House program	\$ 10,000 00
5	American Sewing Guild - Southern Oregon 1685 Wagon Trail Dr Jacksonville, OR	N/A	PC	Support the ASG community service program	\$ 2,730 00
6	Ashland Emergency Food Bank P O Box 3578 Ashland, OR	N/A	PC	Support the food purchase project	\$ 2,000 00
7	Ashland Emergency Food Bank P O Box 3578 Ashland, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
8	Barboursville Vounteer Fire Department PO Box 325 Barboursville, WV	N/A	PC	Support the Base Radio Upgrade project	\$ 4,000 00
9	Barry County Fire Chiefs Association PO Box 86 Shell Knob, MO	N/A	PC	Support necessary repairs to the firefighter training trailer	\$ 2,000 00
10	Boy Scouts of America, Crater Lake Council 3039 Hanley Rd Central Point, OR	N/A	PC	Support the construction of the BSA shooting sports complex safe area at Camp McLoughlin, with Foundation	\$ 10,000 00
11	Butterfield Fire Protection District 10600 East 1st Street Butterfield, MO	N/A	GOV	Support the purchase of Portable Digital Radios	\$ 4,346 00
12	Cassville Police Department 302 Main Street Cassville, MO	N/A	GOV	Support the purchase of 2 Automatic External Defibrillators (AED) and the requested water rescue supplies	\$ 4,655 00
13	Chiron Center Incorporated P O Box 1004 Jacksonville, OR	N/A	PC	Support the behavioral health and wellness program for members of the HTCTF	\$ 10,000 00
14	City of Milton- Police Department 1139 Smith Street Milton, WV	N/A	GOV	Support the New Server & Software project	\$ 15,000 00
15	Community Works, Inc 2594 East Barnett Ave, Suite C Medford OR	N/A	PC	Support the Project Dove program	\$ 2,000 00

Form 990-PF, Part XV, Line 3a

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
16	Cox Monett Hospital 801 Lincoln Ave Monett, MO	N/A	PC	Support the purchase of 3 Tasers & 4 Ballistic Plates	\$ 5,252 00
17	Crossing Bridges Therapeutic Riding Center P O Box 2276 Grants Pass, OR	N/A	PC	Support the 2020 Student Scholarship Program	\$ 3,500 00
18	Diaper Bank of the Ozarks 615 N Glenstone Ave Springfield, OR	N/A	PC	Support the purchase of diapers for families in need	\$ 1,000 00
19	Dogs for Better Lives (formerly -Dogs for the Deaf) 10175 Wheeler Road Central Point, OR	N/A	PC	Support the feeding program for assistance dogs in training	\$ 6,250 00
20	Exeter Fire Protection District P O Box 156 Exeter, MO	N/A	GOV	Support the purchase of a sidewinder remote control front mount brush truck monitor for fire suppression	\$ 7,000 00
21	Golden Girl Inc P O Box 876 Ceredo, WV	N/A	PC	Support the Purchase of Furnishings for the Golden Minds Center for Learning and Development	\$ 3,000 00
22	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
23	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	N/A	PC	Support the "Circle Of Hope" Challenge at the Building Homes, Building Hope event	\$ 2,500 00
24	Hearts With A Mission 711 Medford Center #334 Medford, OR	N/A	PC	Provide general operating support	\$ 5,000 00
25	Hearts With A Mission 711 Medford Center #334 Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
26	HOPE Equestrian Center PO Box 396 Eagle Point, OR	N/A	PC	Multi year gift in support of Home for Hope Capital Campaign, with naming rights opportunities	\$ 10,000 00
27	Huntington Police Department 675 10th St Huntington, WV	N/A	GOV	Support the purchase of dual fuel flashlights to assist in officer safety	\$ 12,840 00
28	Jackson County 4-H & FFA Jr Livestock Auction 12100 Agate Road Eagle Point, OR	N/A	PC	Support the purchase of a lamb at the 2019 Jackson County Spring Fair from a 4H/FFA exhibitor	\$ 2,780 00
29	Jackson County Child Abuse Task Force - CAC 816 W 10th Street Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
30	Jackson County School District 6 300 Ash Street Central Point, OR	N/A	GOV	Support the Library remodel project	\$ 3,000 00
31	Jackson County School District 6 300 Ash Street Central Point, OR	N/A	GOV	Support the construction of the Hanby Hillside Natural Playground	\$ 7,941 00
32	Josephine County Food Bank 3658 Upper River Road Grants Pass, OR	N/A	PC	Support the Pop-Up Pantry Program	\$ 10,000 00
33	Josephine County Foundation P O Box 673 Murphy, OR	N/A	PC	Support Project SAFE (Students Acquiring Firefighting Equipment)	\$ 10,000 00

	Recipient Name and Address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
34	KAIROS Northwest 1750 Nebraska, Bldg A Grants Pass, OR	N/A	PC	Support the New Beginnings Sensory Project	\$ 5,077 00
35	Kids Unlimited of Oregon 821 N Riverside Medford, OR	N/A	PC	Support the Pre-Kindergarten Program at Kids Unlimited	\$ 10,000 00
36	La Clinica Del Valle Family Health Care Center 3617 S Pacific Hwy Medford, OR	N/A	PC	Support the Primary Care Oral Hygiene Expansion project	\$ 5,000 00
37	La Clinica Del Valle Family Health Care Center 3617 S Pacific Hwy Medford, OR	N/A	PC	support your current pressing needs	\$ 5,000 00
38	Maslow Project 500 Monroe Street Medford, OR	N/A	PC	Support the purchase of basic needs and emergency supplies for homeless Jackson and Josephine County youth	\$ 3,500 00
39	Maslow Project 500 Monroe Street Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
40	Max's Mission P O Box 1145 Jacksonville, OR	N/A	PC	Support the purchase of Naloxone & kits for use in the rural outreach project	\$ 2,050 00
41	Medical Teams International 14150 SW Milton Court Tigard, OR	N/A	PC	Provide Free Dental Care for Low-Income People in Jackson & Josephine Counties, OR	\$ 2,500 00
42	Milton Volunteer Fire Department 341 E Main Street Milton, WV	N/A	PC	Support the Fire Gear Replacement Project	\$ 15,000 00
43	Pacific Bible College 28 S Fir, Suite 212 Medford, OR	N/A	PC	Support the purchase of chairs, microscope and a network storage device	\$ 3,484 00
44	Peace House P O Box 524 Ashland, OR	N/A	PC	Support the Uncle Food's Diner program	\$ 1,500 00
45	Peter Britt Gardens Music and Arts Festival PO Box 1124 Medford, OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
46	Purdy Fire Protection District P.O Box 51 Purdy, MO	N/A	GOV	Support the purchase of 6 self contained breathing air bottles for firefighters	\$ 6,900 00
47	Reaching Our Community (ROC) 564 SW Foundry St Grants Pass, OR	N/A	PC	Support the Food Procurement project	\$ 5,000 00
48	Rogue Community College (RCC) 3345 Redwood Highway Grants Pass, OR	N/A	GOV	Provide food vouchers for students who are registered as STEP program participants	\$ 2,500 00
49	Society of St Vincent de Paul P O Box 1663 Medford, OR	N/A	PC	To address your current pressing needs	\$ 7,500 00
50	Society of St Vincent De Paul - Our lady of the 132 SE H Street Grants Pass, OR	N/A	PC	Provide assistance for individuals and families living in poverty with rent, utilities, medical needs, IDS, and	\$ 5,000 00
51	Sparrow Clubs USA 2960 Doctors Park Drive Medford OR	N/A	PC	Support the office relocation project	\$ 2,000 00

Form 990-PF, Part XV, Line 3a

Form 990-PF, Part IV, 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)					
52	Spartan Boxing Club 729 Welch St Medford OR	N/A	PC	Support of the KEY Program	\$ 6,000 00
53	The ALS Association of Oregon and SW 700 NE Multnomah St Portland, OR	N/A	PC	Support the work of the Southern Oregon ALS Family Support Program	\$ 5,000 00
54	The Butcher Shop 1532 S Shasta Ave Eagle Point, OR	N/A	other	Processing Fees for a Lamb purchased at the Spring 2019 Fair and donated to Kids Unlimited	\$ 130 00
55	The Salvation Army, Medford Citadel P O Box 757 Medford OR	N/A	PC	Support your current pressing needs	\$ 5,000 00
56	United Way of Jackson County 60 Hawthorne Street Medford, OR	N/A	PC	Support the 2020 ONLC in Ashland, Oregon	\$ 1,500 00
57	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	N/A	PC	Provide general operating support to meet your greatest needs	\$ 5,000 00
58	Wheaton Rural Fire Department P O Box 10 Wheaton, MO	N/A	PC	Support the purchase of 50 Watt VHF Mobile Radios	\$ 3,845 00
59	Wilderness Trails, Inc P O Box 4655 Medford, OR	N/A	PC	Sponsor at-risk/foster children from Southern Oregon to attend one or more of our weekend follow-up retreats	\$ 3,000 00
60	Wildlife Images Rehabilitation and Education P O Box 36 Merlin, OR	N/A	PC	Support the dangerous tree repair and removal project on the Wildlife Images campus	\$ 3,500 00
61	Women's Crisis Support Team 560 A -NE F Street, PMB #430 Grants Pass, OR	N/A	PC	Support the Calhoun House Sidewalk and Irrigation Repair/ Replacement Project	\$ 4,465 00
62	YMCA dba Rogue Valley Family YMCA 522 West Sixth Street Medford, OR	N/A	PC	Support the YMCA childcare expansion project	\$ 25,000 00
63	Youth 71Five Ministries 529 Edward St Medford, OR	N/A	PC	Support the renovations of the firehouse program and initial start up costs	\$ 10,000 00
TOTAL PAID DURING THIS YEAR					\$ 379,245 00

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

Organization Robert & Frances Chaney Family Foundation
TIN 20-5052365
Tax Year Ended: 31-May-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
1	Asante Foundation 2600 Siskiyou Blvd Ste 100 Medford, OR	\$ 5,000.00	8/26/2019	Support the Asante Forward Campaign		No		
2	ACCESS P O Box 4666 Medford, OR	\$ 3,000.00	10/30/2019	Support the Fueling Healthy Families project		No		
3	ACCESS P O Box 4666 Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
4	Addictions Recovery Center, Inc (ARC) 1003 E Main St Suite 104 Medford, OR	\$ 10,000.00	10/31/2019	Support the purchase of a van to transport women in the Reddy House program		No		
5	American Sewing Guild - Southern Oregon Chapter 1685 Wagon Trail Dr Jacksonville, OR	\$ 2,730.00	4/22/2020	Support the ASG community service program		No		
6	Ashland Emergency Food Bank P O Box 3578 Ashland, OR	\$ 2,000.00	10/31/2019	Support the food purchase project		No		
7	Ashland Emergency Food Bank P.O Box 3578 Ashland, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
8	Barboursville Vounteer Fire Department PO Box 325 Barboursville, WV	\$ 4,000.00	4/22/2020	Support the Base Radio Upgrade project		No		

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

Organization: Robert & Frances Chaney Family Foundation
TIN 20-5052365
Tax Year Ended: 31-May-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
9	Barry County Fire Chiefs Association PO Box 86 Shell Knob, MO	\$ 2,000.00	10/30/2019	Support necessary repairs to the firefighter training trailer		No		
10	Boy Scouts of America, Crater Lake Council 3039 Hanley Rd Central Point, OR	\$ 10,000.00	10/31/2019	Support the construction of the BSA shooting sports complex safe area at Camp McLoughlin, with Foundation		No		
11	Butterfield Fire Protection District 10600 East 1st Street Butterfield, MO	\$ 4,346.00	10/30/2019	Support the purchase of Portable Digital Radios		No		
12	Cassville Police Department 302 Main Street Cassville, MO	\$ 4,655.00	10/30/2019	Support the purchase of 2 Automatic External Defibrillators (AED) and the requested water rescue supplies		No		
13	Chiron Center Incorporated P.O. Box 1004 Jacksonville, OR	\$ 10,000.00	4/22/2020	Support the behavioral health and wellness program for members of the HTCCTF		No		
14	City of Milton- Police Department 1139 Smith Street Milton, WV	\$ 15,000.00	4/22/2020	Support the New Server & Software project		No		
15	Community Works, Inc 2594 East Barnett Ave, Suite C Medford, OR	\$ 2,000.00	4/22/2020	Support the Project Dove program		No		
16	Cox Monett Hospital 801 Lincoln Ave Monett, MO	\$ 5,252.00	10/30/2019	Support the purchase of 3 Tasers & 4 Ballistic Plates		No		

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

Organization: Robert & Frances Chaney Family Foundation
TIN 20-5052365
Tax Year Ended 31-May-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
17	Crossing Bridges Therapeutic Riding Center P O Box 2276 Grants Pass, OR	\$ 3,500.00	4/22/2020	Support the 2020 Student Scholarship Program		No		
18	Diaper Bank of the Ozarks 615 N Glenstone Ave Springfield, OR	\$ 1,000.00	10/30/2019	Support the purchase of diapers for families in need		No		
19	Dogs for Better Lives (formerly -Dogs for the 10175 Wheeler Road Central Point, OR	\$ 6,250.00	4/22/2020	Support the feeding program for assistance dogs in training		No		
20	Exeter Fire Protection District P O Box 156 Exeter, MO	\$ 7,000.00	10/30/2019	Support the purchase of a sidewinder remote control front mount brush truck monitor for fire suppression		No		
21	Golden Girl Inc P O Box 876 Ceredo, WV	\$ 3,000.00	4/22/2020	Support the Purchase of Furnishings for the Golden Minds Center for Learning and Development		No		
22	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
23	Habitat for Humanity/Rogue Valley PO Box 688 Medford, OR	\$ 2,500.00	9/18/2019	Support the "Circle Of Hope" Challenge at the Building Homes, Building Hope event		No		
24	Hearts With A Mission 711 Medford Center #334 Medford, OR	\$ 5,000.00	10/31/2019	Provide general operating support		No		

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

Organization: Robert & Frances Chaney Family Foundation
TIN 20-5052365
Tax Year Ended 31-May-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
25	Hearts With A Mission 711 Medford Center #334 Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
26	HOPE Equestrian Center PO Box 396 Eagle Point, OR	\$ 10,000.00	4/22/2020	Multi year gift in support of Home for Hope Capital Campaign, with naming rights opportunities		No		
27	Huntington Police Department 675 10th St Huntington, WV	\$ 12,840.00	10/30/2019	Support the purchase of dual fuel flashlights to assist in officer safety		No		
28	Jackson County 4-H & FFA Jr Livestock Auction Committee 12100 Agate Road Eagle Point, OR	\$ 2,780.00	7/15/2019	Support the purchase of a lamb at the 2019 Jackson County Spring Fair from a 4H/FFA exhibitor		No		
29	Jackson County Child Abuse Task Force - CAC 816 W 10th Street Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
30	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 3,000.00	10/31/2019	Support the Library remodel project		No		
31	Jackson County School District 6 300 Ash Street Central Point, OR	\$ 7,941.00	10/31/2019	Support the construction of the Hanby Hillside Natural Playground		No		
32	Josephine County Food Bank 3658 Upper River Road Grants Pass, OR	\$ 10,000.00	4/22/2020	Support the Pop-Up Pantry Program		No		
33	Josephine County Foundation P.O. Box 673 Murphy, OR	\$ 10,000.00	4/22/2020	Support Project SAFE (Students Acquiring Firefighting Equipment)		No		

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

Organization: Robert & Frances Chaney Family Foundation
TIN: 20-5052365
Tax Year Ended 31-May-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
34	KAIVOS Northwest 1750 Nebraska, Bldg A Grants Pass, OR	\$ 5,077.00	4/22/2020	Support the New Beginnings Sensory Project		No		
35	Kids Unlimited of Oregon 821 N Riverside Medford, OR	\$ 10,000.00	10/31/2019	Support the Pre-Kindergarten Program at Kids Unlimited		No		
36	La Clinica Del Valle Family Health Care Center 3617 S. Pacific Hwy Medford, OR	\$ 5,000.00	10/31/2019	Support the Primary Care Oral Hygiene Expansion project		No		
37	La Clinica Del Valle Family Health Care Center 3617 S. Pacific Hwy Medford, OR	\$ 5,000.00	4/22/2020	support your current pressing needs		No		
38	Maslow Project 500 Monroe Street Medford, OR	\$ 3,500.00	10/31/2019	Support the purchase of basic needs and emergency supplies for homeless Jackson and Josephine County youth		No		
39	Maslow Project 500 Monroe Street Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
40	Max's Mission P O Box 1145 Jacksonville, OR	\$ 2,050.00	10/31/2019	Support the purchase of Naloxone & kits for use in the rural outreach project		No		
41	Medical Teams International 14150 SW Milton Court Tigard, OR	\$ 2,500.00	4/22/2020	Provide Free Dental Care for Low-Income People in Jackson & Josephine Counties, OR		No		
42	Milton Volunteer Fire Department 341 E Main Street Milton, WV	\$ 15,000.00	4/22/2020	Support the Fire Gear Replacement Project		No		

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

Organization: Robert & Frances Chaney Family Foundation

TIN: 20-5052365

Tax Year Ended: 31-May-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
43	Pacific Bible College 28 S. Fir, Suite 212 Medford, OR	\$ 3,484.00	10/31/2019	Support the purchase of chairs, microscope and a network storage device		No		
44	Peace House P O Box 524 Ashland, OR	\$ 1,500.00	10/31/2019	Support the Uncle Food's Diner program		No		
45	Peter Britt Gardens Music and Arts Festival Association PO Box 1124 Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
46	Purdy Fire Protection District P O Box 51 Purdy, MO	\$ 6,900.00	10/30/2019	Support the purchase of 6 self contained breathing air bottles for firefighters		No		
47	Reaching Our Community (ROC) 564 SW Foundry St Grants Pass, OR	\$ 5,000.00	10/31/2019	Support the Food Procurement project		No		
48	Rogue Community College (RCC) 3345 Redwood Highway Grants Pass, OR	\$ 2,500.00	4/22/2020	Provide food vouchers for students who are registered as STEP program participants		No		
49	Society of St. Vincent de Paul P.O. Box 1663 Medford, OR	\$ 7,500.00	4/22/2020	To address your current pressing needs		No		
50	Society of St. Vincent De Paul - Our lady of the 132 SE H Street Grants Pass, OR	\$ 5,000.00	4/22/2020	Provide assistance for individuals and families living in poverty with rent, utilities, medical needs, IDS, and		No		
51	Sparrow Clubs USA 2960 Doctors Park Drive Medford, OR	\$ 2,000.00	4/22/2020	Support the office relocation project		No		

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

Organization Robert & Frances Chaney Family Foundation
 TIN: 20-5052365
 Tax Year Ended 31-May-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
52	Spartan Boxing Club 729 Welch St Medford, OR	\$ 6,000.00	10/31/2019	Support of the KEY Program		No		
53	The ALS Association of Oregon and SW Washington Chapter 700 NE Multnomah StSte 210 Portland, OR	\$ 5,000.00	6/4/2019	Support the work of the Southern Oregon ALS Family Support Program		No		
54	The Butcher Shop 1532 S Shasta Ave Eagle Point, OR	\$ 130.00	6/11/2019	Processing Fees for a Lamb purchased at the Spring 2019 Fair and donated to Kids Unlimited		No		
55	The Salvation Army, Medford Citadel P.O. Box 757 Medford, OR	\$ 5,000.00	4/22/2020	Support your current pressing needs		No		
56	United Way of Jackson County 60 Hawthorne Street Medford, OR	\$ 1,500.00	10/31/2019	Support the 2020 ONLC in Ashland, Oregon		No		
57	Walking Tall Southern Oregon PO Box 3789 Central Point, OR	\$ 5,000.00	4/22/2020	Provide general operating support to meet your greatest needs		No		
58	Wheaton Rural Fire Department P.O. Box 10 Wheaton, MO	\$ 3,845.00	10/30/2019	Support the purchase of 50 Watt VHF Mobile Radios		No		
59	Wilderness Trails, Inc. P O Box 4655 Medford, OR	\$ 3,000.00	10/31/2019	Sponsor at-risk/foster children from Southern Oregon to attend one or more of our weekend follow-up retreats		No		
60	Wildlife Images Rehabilitation and Education Center P O Box 36 Merlin, OR	\$ 3,500.00	4/22/2020	Support the dangerous tree repair and removal project on the Wildlife Images campus		No		

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

Organization: Robert & Frances Chaney Family Foundation
 TIN: 20-5052365
 Tax Year Ended: 31-May-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
61	Women's Crisis Support Team 560 A -NE F Street, PMB #430 Grants Pass, OR	\$ 4,465.00	4/22/2020	Support the Calhoun House Sidewalk and Irrigation Repair/ Replacement Project		No		
62	YMCA dba Rogue Valley Family YMCA 522 West Sixth Street Medford, OR	\$ 25,000.00	12/3/2019	Support the YMCA childcare expansion project		No		
63	Youth 71Five Ministries 529 Edward St Medford, OR	\$ 10,000.00	4/22/2020	Support the renovations of the firehouse program and initial start up costs		No		
64	Youth 71Five Ministries 529 Edward St Medford, OR	\$ 25,000.00	6/14/2019	Support of the VoTech Training Center and Vocational Housing Program with special naming rights for		No		
TOTAL PAID DURING THIS YEAR		\$ 379,245.00						