

GRANT APPLICATION GUIDELINES

Deadlines: The Foundation Board meets quarterly. Call the office, (541) 772-5732, for application deadline dates.

Eligibility Considerations and Requirements: Grant applications will be accepted only from tax exempt agencies. No grants to individuals will be made. Only one grant per year to any agency is usually considered. The Foundation makes grants only within Jackson and Josephine Counties with the exception of a few statewide public interest issues directly affecting persons living in these counties. The Foundation rarely makes multi-year grants, grants for historical applications, hospital construction or equipment, group or individual trips, or activities for religious purposes.

Application:

To facilitate copying, please do not staple or clip, use 8 1/2 x 11 white paper, printed on one side only.

E-mail applications are not accepted. Applications should include the following:

- Cover letter (no more than 1 page) with signature from the applicant organization summarizing the scope of the project; the amount of the request; and the name, address, telephone number and e-mail address of the person to contact regarding the request (independent grant writers are not an acceptable contact).
- Proposal Information (**no more than 4 pages, please number each page in this section**)
 - Description of proposal or project, and the community needs that it addresses.
 - Review of the applicant agency, its purpose and services to the community, its staffing and use of volunteers.
 - The project budget, showing specifically how the grant funds will be used, as well as other possible funding sources for this project.
 - Description of how the project will be funded in the future (if applicable).
 - The planning process, staffing and timeline for the project.
 - Result expected and proposed evaluation method.
 - Any recent independent board fundraising efforts.
- Required Attachments (**please do not staple or clip**)
 - Detailed budget for the agency's current year and the year for which the project is proposed (if different). The Foundation does not fund administrative costs based on a flat percentage of the project budget.
 - Income statement and balance sheet from the most recently completed fiscal year (or audit, if available). No 990's please.
 - List of board of directors, occupations, and addresses.
 - Approval of the application by the agency's board of directors.
 - Copy of the IRS exemption letter under section 501(c)(3).

Interview:

The applicant agency is ordinarily scheduled to meet with the Program Review Committee of the Foundation Board for a brief discussion some days prior to the meeting at which the Foundation's Board of Trustees makes grant decisions.

Foundation Office:

824 East Main, Suite 102, Medford, Oregon 97504
(541) 772-5851 Fax: (541) 773-3970

Website: www.carpenter-foundation.org

All new applicants and those wishing to discuss applications should contact: Polly Williams, Program Officer (541) 772-5732
pwilliams@carpenter-foundation.org

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Medford, OR 97504

THE CARPENTER
FOUNDATION



THE CARPENTER FOUNDATION

ANNUAL REPORT

2016 - 2017

MEDFORD, OREGON

PRESIDENT'S REPORT

The major focus of The Carpenter Foundation has remained constant over the past half century and that is to make grants in four areas: human services, education, the arts and certain public interest issues. The Foundation limits its funding to these activities and to the geographic area of Jackson and Josephine Counties in order to make more effective and focused use of limited resources.

The Carpenter Foundation is a private family foundation governed by a board which includes family members and public trustees who represent a wide range of experience and interests. Trustees make policy, grant, and financial management decisions.

The Foundation is deeply concerned with the well-being of children and families and their relationship to their neighborhoods and communities. A parallel concern is the health of the web of agencies and organizations which serve them. It is vital that these agencies, public and private, work together to assist with the broad array of complexities that face families and communities today.

Of keen interest to The Carpenter Foundation are the nature and the characteristics of community life. These are evidenced by the opportunities offered low-income citizens, the quality of education, the breadth of experience in the arts, and such public policy issues as the environment and community planning, with emphasis on the long-range view.

PURPOSE

The purpose of The Carpenter Foundation is to add opportunity, choice, inclusiveness, enrichment and a climate for change for those living in the Rogue Valley. The Foundation works in partnership with other agencies, organizations and public entities.

HISTORY

The Carpenter Foundation was established by Alfred S.V. Carpenter and Helen Bundy Carpenter in 1942. It was then called the Jackson County Recreation Agency and provided recreational activities for servicemen at Camp White. The Foundation was reorganized in 1958, evolving from a personal vehicle for charitable giving to a general purpose family foundation. In 1972, four public trustees were added to the family members on the board to achieve a broader base of experience for decision making. The Foundation continued its growth and development as a community partner under the leadership of Jane and Dunbar Carpenter who guided The Carpenter Foundation for over 30 years.

FINANCIAL STATEMENTS

STATEMENT OF FINANCIAL POSITION

As of June 30

Assets	2017	2016
Cash	39,425	116,556
Investments	18,869,738	17,188,108
Excise tax receivable	11,209	12,297
Deposit	3,636	3,591
Deferred tax asset	0	3,000
Office equipment, net	6,595	2,133
Total Assets	18,930,603	17,325,685
Liabilities and Fund Balance		
Grants payable	117,500	163,325
Accrued Expenses	4,182	3,895
Excise tax payable	15,900	0
Fund balance	18,793,021	17,158,465
Total Liabilities and Fund Balance	18,930,603	17,325,685

STATEMENT OF ACTIVITIES

Years ended June 30

Revenue	2017	2016
Interest and dividends	453,603	535,618
Net realized & unrealized	318,412	1,390,320
Total Revenue	772,015	1,925,938
Expenditures		
Grants	751,278	763,488
Financial management	18,369	18,679
Administrative expenses	225,421	227,688
Federal excise tax	26,832	(6,114)
Total Expenditures	1,021,900	1,003,741
Excess of revenue over expenditures	(249,885)	922,197
Fund balance beginning of year	17,158,465	18,905,659
Fund balance end of year	18,793,021	17,158,465

The condensed financial statements were derived from reviewed (2016) and audited (2017) financial statements.

BOARD OF TRUSTEES

Emily C. Mostue	<i>President</i>
Karen C. Allan	<i>Vice President & Secretary</i>
William R. Moffat	<i>Investment Manager & Treasurer</i>
Mary Curtis Gramley	
Linda Hugle	
Lee Murdoch	
Sue Naumes	
Paul Nicholson	
Dan Thorndike	

FOUNDATION STAFF

Polly Williams	<i>Program Officer</i>
Tammie Henriksen	<i>Office Administrator</i>

THE CARPENTER FOUNDATION GRANT STATEMENT JULY 1, 2016 THROUGH JUNE 30, 2017

HUMAN SERVICE		Living Opportunities, Medford	\$10,000	EDUCATION		Southern Oregon University, Ashland	\$25,000	Rogue Valley Peace Choir, Ashland	\$1,500
Addictions Recovery Center, Medford	\$10,000	Toward the purchase of vehicles to transport clients.		Architectural Foundation of Oregon, Portland	\$2,000	In support of faculty development opportunities which improve teaching skills.		Toward the cost of six additional concerts.	
Toward expanding mental health services to persons suffering from addictions.				In support of an architectural residency program for grades 3-5.				Rogue Valley Symphony, Ashland	\$12,000
Ashland Culture of Peace Commission	\$3,000	Magdalene Home, Medford	\$2,000	Ashland Parks Foundation	\$4,500	Toward the purchase of Chromebooks for use by the special education classes.	\$2,000	In support of the Classical Coaches in the Classroom and Discovery Concerts educational programs.	
To train volunteers to staff the local homeless shelters.		In support of general operations.		To provide assistance to elementary school classes to attend the North Mountain Park Nature Center's School Program.				Southern Oregon Film Society, Ashland	\$5,000
Ashland Emergency Food Bank	\$5,000	Maslow Project, Medford	\$10,000	Butte Falls Charter School	\$7,500	Toward the development of educational opportunities on newly acquired property.	\$3,000	To increase access to the film arts for local youth and underserved residents.	
Toward the purchase of food for distribution.		In support of providing case management services to homeless youth and their families.		Toward the development of educational opportunities on newly acquired property.				Southern Oregon Music Festival, Jacksonville	\$3,000
Ashland Family YMCA	\$10,000	Neighborhood Food Project, Ashland	\$3,000	Classroom Law Project, Portland	\$5,000	To support a program for teachers to improve the teaching of civics.	\$3,000	In support of providing two festival bands to perform in local middle and high schools.	
Toward the renovation of Camp Low Echo at Lake of the Woods.		To upgrade the websites of The Neighborhood Food Project communities to increase outreach and education efforts.		To support a program for teachers to improve the teaching of civics.			To provide general operating support.	Southern Oregon Repertory Singers, Ashland	\$5,000
Boys & Girls Clubs of the Rogue Valley, Grants Pass	\$10,000	Options for Homeless Residents of Ashland	\$10,000	College Dreams Inc., Grants Pass	\$8,000	To provide low-income youth with scholarship assistance to attend pre-college camps.	\$5,000	In support of a new Executive Director staff position and salaries for the Music Director and Pianist.	
In support of an ongoing after-school program incorporating education, enrichment and fitness.		To provide staffing for a program working to secure housing for low-income residents.		To provide low-income youth with scholarship assistance to attend pre-college camps.			Toward comprehensive strategic and succession planning.	Youth Symphony of Southern Oregon, Medford	\$8,000
Butte Falls Community School Partnership	\$5,000	Oregon Lions Sight & Hearing Foundation, Portland	\$5,000	Consumer Credit Counseling Service of Southern Oregon, Medford	\$5,000	For a community outreach program providing financial literacy education.	\$5,000	In support of operations.	
To replace the lighting system at the facility.		To provide vision screening events in local elementary schools.		Phoenix Counseling Center	\$5,000	Toward expanding addiction treatment services.	\$5,000		
CARE Foundation, Seattle, WA	\$3,000	Phoenix Counseling Center	\$5,000	Toward expanding addiction treatment services.		Planned Parenthood of Southwestern Oregon, Medford	\$8,000	PUBLIC INTEREST	
A grant made in memory of Helen Bundy Carpenter.		Toward expanding addiction treatment services.		In support of sex education programs for local youth.		Reaching Our Community (ROC), Grants Pass	\$10,000	Evans Valley Community Association, Rogue River	\$5,000
CASA of Jackson & Josephine Counties, Medford	\$15,000	Planned Parenthood of Southwestern Oregon, Medford	\$8,000	Toward salary costs for two, part-time staff positions.		Toward the completion of a residential safe house for minor female victims of domestic sex trafficking.	\$5,000	Toward the repair and upgrading of the HVAC system at the Community Center.	
To recruit and retain CASA volunteers to meet the growing need in Jackson and Josephine counties.		In support of sex education programs for local youth.		Redemption Ridge, Medford	\$5,000	Rogue Valley Family YMCA, Medford	\$12,000	Illinois Valley Community Development, Cave Junction	\$5,000
Children's Advocacy Center of Jackson County, Medford	\$5,000	Reaching Our Community (ROC), Grants Pass	\$10,000	In support of providing trainings for the board of directors, staff and volunteers.		In support of upgrades to the aquatic center.		In support of a staff position to implement the Illinois Valley 20/20 Vision and Strategic Plan.	
In support of providing trainings for the board of directors, staff and volunteers.		Toward salary costs for two, part-time staff positions.		Children's Dental Clinic of Jackson County, Medford	\$7,500	Salvation Army-Grants Pass Corps	\$7,500	Jackson County Library System, Medford	\$3,000
Children's Dental Clinic of Jackson County, Medford	\$7,500	Salvation Army-Grants Pass Corps	\$7,500	Toward providing free dental services to low-income children.		Toward the purchase and distribution of food for people in need in Josephine County.		A grant to purchase books in memory of Alfred SV Carpenter.	
Toward providing free dental services to low-income children.		Toward the purchase and distribution of food for people in need in Josephine County.		Columbia Care, Medford	\$5,000	Southern Oregon Friends of Hospice, Ashland	\$10,000	Josephine Community Libraries, Grants Pass	\$15,000
To assist mentally ill, low-income clients with various urgent needs.		Southern Oregon Friends of Hospice, Ashland	\$10,000	To assist mentally ill, low-income clients with various urgent needs.		Toward renovation and construction costs for a 12-bed residential hospice center.		To improve purchase books and lendable resources in the library's collection.	
Community Counseling Center of Ashland	\$1,500	Toward renovation and construction costs for a 12-bed residential hospice center.		Community Counseling Center of Ashland	\$1,500	Spartan Boxing, Medford	\$5,000	Kerbyville Museum & History Center, Kerby	\$2,500
To subsidize some charges so clients can receive counseling at a reduced fee.		Spartan Boxing, Medford	\$5,000	In support of adding a part-time Administrative Assistant staff position.		Spiral Living Center, Cave Junction	\$2,000	In support of replacing the roof at the museum.	
Compass House, Medford	\$10,000	In support of adding a part-time Administrative Assistant staff position.		Spiral Living Center, Cave Junction	\$2,000	To support a gleaning project in the Illinois Valley.		Oregon Nonprofit Leaders Conference, Medford	\$1,500
Toward an upgrade to the technology and telephone systems.		St. Mark's Episcopal Church, Medford	\$5,000	To support a gleaning project in the Illinois Valley.		St. Vincent de Paul Society, Grants Pass	\$10,000	Sponsorship for the spring 2017 conference.	
Crossing Bridges Therapeutic Riding Center, Grants Pass	\$3,000	To purchase various food items to be distributed through the food pantry.		St. Vincent de Paul Society, Grants Pass	\$10,000	To provide financial assistance for basic needs such as rent, utilities, and prescriptions.		Pacifica: A Garden in the Siskiyou, Williams	\$5,000
To provide scholarship assistance for students to participate in the equine therapy program.		St. Vincent de Paul Society, Medford	\$15,000	To assist low-income families who are in danger of having their utilities shut off.		St. Vincent de Paul Society, Medford	\$15,000	Toward the replacement of two heat pumps in the Cedar Center facility.	
Healing Blues Inc., Los Angeles, CA	\$1,500	To assist low-income families who are in danger of having their utilities shut off.		Team Overland, Medford	\$2,500	United Way of Jackson County, Medford	\$20,000	Wildlife Images, Merlin	\$10,000
In support of a stress reduction program at Armadillo Technical Institute.		Team Overland, Medford	\$2,500	General operating support for a program serving veterans.		In support of general operations.		Toward the purchase of property to redevelop several animal enclosures.	
Healthy U, Cave Junction	\$4,000	United Way of Jackson County, Medford	\$20,000	Winterspring Center, Medford	\$5,000	Women's Crisis Support Team, Grants Pass	\$10,000	SCHOLARSHIPS	
To promote awareness and improve the health of rural Josephine County residents.		In support of general operations.		To upgrade the organization's technology.		In support of a violence prevention education program in local high schools.		The following public high schools received funding for Carpenter Foundation Scholarships. The grants are administered by each school under contract with the Foundation:	
Heart & Hope Music, Ashland	\$5,000	Winterspring Center, Medford	\$5,000	Women's Crisis Support Team, Grants Pass	\$10,000			Ashland High School	\$14,400
To provide music therapy sessions in nursing homes.		In support of the organization's technology.		In support of a violence prevention education program in local high schools.				Butte Falls High School	\$ 1,100
HIV Alliance, Eugene	\$3,000	Women's Crisis Support Team, Grants Pass	\$10,000					Central Point High School	\$16,500
In support of HIV prevention/education programs in Josephine County.		In support of a violence prevention education program in local high schools.						Eagle Point High School	\$12,000
HOPE Equestrian Center, Eagle Point	\$6,000							North Medford High School	\$21,500
To provide scholarships for low-income individuals to participate in a therapeutic riding program.								Phoenix High School	\$ 9,100
Illinois Valley Family Coalition, Cave Junction	\$7,000							Prospect High School	\$ 1,100
To increase staffing and for general operating costs.								Rogue River High School	\$ 4,500
								South Medford High School	\$19,800
								Rogue Community College Foundation, Grants Pass	\$25,000
								For Jackson & Josephine County student scholarships.	