

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

2015 - 2016

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 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	2016	2015
Cash	116,556	121,803
Investments	17,188,108	19,030,683
Excise tax receivable	12,297	0
Deposit	3,591	933
Deferred tax asset	3,000	0
Office equipment, net	2,133	3,035
Total assets	17,325,685	19,156,454
Liabilities and fund balance		
Grants payable	163,325	211,400
Accrued Expenses	3,895	3,684
Excise tax payable	0	35,711
Fund balance	17,158,465	18,905,659
Total Liabilities and Fund Balance	17,325,685	19,156,454

STATEMENT OF ACTIVITIES

Years ended June 30

Revenue	2016	2015
Interest and dividends	535,618	1,100,529
Net realized & unrealized	1,390,320	538,052
Total revenue	1,925,938	1,638,581
Expenditures		
Grants	763,488	740,268
Financial management	18,679	19,523
Administrative expenses	227,688	210,193
Federal excise tax	-6,114	19,180
Total expenditures	1,003,741	989,164
Excess of revenue over expenditures	922,197	649,417
Fund balance beginning of year	18,905,659	19,684,985
Fund balance end of year	17,158,465	18,905,659

The condensed financial statements were derived from reviewed (2016) and audited (2015) 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>
Sara Hopkins	
Linda Hugle	
Lee Murdoch	
Sue Naumes	
Mark Schiveley	
Dan Thorndike	

FOUNDATION STAFF

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

THE CARPENTER FOUNDATION GRANT STATEMENT JULY 1, 2015 THROUGH JUNE 30, 2016

HUMAN SERVICES							PUBLIC INTEREST		
Age Friendly Innovators, Jacksonville	\$4,000	Oregon Lions Sight & Hearing Foundation, Portland	\$5,000	Environmental Education Association of Oregon, Portland	\$5,000	Grants Pass School District #7	\$5,000	Eagle Point Parks Foundation	\$5,000
For liability insurance, a computer tablet and home safety devices for local seniors.		In support of providing vision screening services to elementary school children.		In support of a workshop for teachers on how to implement environmental education in their classrooms.		Toward the purchase of musical instruments for use by local students.		Toward the construction of a restroom facility at the new Lucas Park in Eagle Point.	
ASSIST, Portland	\$3,125	Phoenix Counseling Center	\$5,000	First Christian Church of Medford	\$3,700	Grants Pass/Josephine County Chamber Foundation	\$2,000	Eugene Debbs Potts Foundation, Merlin	\$1,000
For training local social workers and others helping clients with severe mental and/or physical disabilities to apply for Social Security benefits.		Toward costs to renovate space for additional clinical staff.		To remodel a classroom to expand the pre-school program.		Toward the completion of a 200 foot mural on a building at Asante Three Rivers Medical Center.		Toward the purchase and installation of informational signage at the Pottsville Historical Museum.	
Boys & Girls Clubs of the Rogue Valley, Grants Pass	\$10,000	Planned Parenthood of Southwestern Oregon, Medford	\$8,000	Hidden Valley High School, Grants Pass	\$5,000	Heart & Hope Music, Ashland	\$5,000	Healthy Democracy Fund, Portland	\$4,000
In support of an ongoing after-school program focusing on homework help and educational games.		In support of a leadership and education program for local youth.		Toward the renovation/upgrade of a softball field.		For an elder care music therapy program.		In support of local residents participating in both the statewide and on-line beta test supplement to the Citizen's Initiative Review in 2016.	
CARE Foundation, Seattle, WA	\$3,000	Reaching Our Community (ROC), Grants Pass	\$10,000	Kids Unlimited, Medford	\$20,000	JPR Foundation Inc., Ashland	\$5,000	Illinois Valley Watershed Council, Cave Junction	\$1,500
A grant made in memory of Helen Bundy Carpenter.		In support of staff positions at the ROC Food Bank.		Toward the purchase of a portable staging unit to be used in the new gymnasium.		In support of the ongoing restoration of the Holly Theatre.		To produce an educational video to use to promote donations and encourage community involvement in watershed activities.	
Center for Non-Profit Legal Services, Medford	\$7,500	Rogue Retreat, Medford	\$10,000	Lomakatsi Restoration Project, Ashland	\$6,000	Medford School District 549C	\$5,000	Jackson County Library System, Medford	\$3,000
In support of outreach sessions and citizenship classes to prepare immigrants for the naturalization exam.		To provide case management and support services to residents in Rogue Retreat housing.		In support of a program where local students help restore ecological sites near their schools.		Tuition support for high school students to attend a residential arts program at Southern Oregon University.		A grant to purchase books in memory of Alfred SV Carpenter.	
Community Works, Medford	\$7,500	Rogue Valley Council of Governments, Central Point	\$8,000	Madrone Trail Public Charter School, Central Point	\$5,000	Miracle Theatre Group, Portland	\$2,000	Jacksonville Community Center	\$5,000
To assist in developing a sustainable development plan.		Toward the purchase of equipment for the new commercial kitchen at Food & Friends in Josephine County.		For improvements to a portable classroom.		In support of a bilingual/bicultural theatre residency and performance program at South Medford High School.		Toward the expansion of the current Community Center building.	
Compass House, Medford	\$10,000	Salvation Army-Grants Pass Corps	\$7,500	Nonprofit Association of Oregon, Portland	\$8,000	Modern Roots Foundation, Ashland	\$3,000	Josephine County, Grants Pass	\$3,000
Toward the purchase, insurance and maintenance of a car to provide transportation for clubhouse members.		Toward the purchase and distribution of food for people in need.		In support of a series of eight trainings for local nonprofits.		To provide scholarships to local youth to participate in a variety of music education programs.		Toward the purchase and application of paint for the Josephine County Fairgrounds.	
Crossing Bridges Therapeutic Riding Center, Grants Pass	\$5,000	Southern Oregon Friends of Hospice, Ashland	\$20,000	Oregon Museum of Science & Industry, Portland	\$2,500	North Medford High School	\$2,200	Klamath-Siskiyou Wildlands Center, Ashland	\$2,500
Toward the construction of an indoor riding arena.		Toward the purchase and renovation of a facility in Medford to provide hospice care services.		In support of bringing science education programs to local schools.		To bring local theatre professionals into North and South Medford high schools for presentations and workshops.		To construct a wooden fence to prevent off-road vehicles from damaging sensitive wet meadow habitat.	
Family Nurturing Center, Medford	\$5,000	Spartan Boxing, Medford	\$3,500	Phoenix-Talent School District, Phoenix	\$15,000	Oregon Conservatory of Performing Arts, Medford	\$2,000	Multicultural Association of Southern Oregon, Medford	\$3,000
Toward installing irrigation and a garden at OnTrack's Moms Home.		In support of general operations.		In support of a residential program at Southern Oregon University for Latino students.		To strengthen the board of directors, improve bookkeeping and develop donor and marketing plans.		In support of a staff person to administer and present the news program at KSKQ.	
Habitat for Humanity/Rogue Valley, Medford	\$6,000	Special Olympics Oregon, Portland	\$3,000	Rogue Valley Farm to School, Ashland	\$6,000	Oregon Shakespeare Festival Association, Ashland	\$25,000	Oregon Nonprofit Leaders Conference, Medford	\$1,500
Toward the purchase of lots to build six new homes.		In support of a year-round fitness and nutrition program specifically for persons with intellectual disabilities.		In support of general operations.		In support of special matinees and reduced price performances for students and low-income residents.		Sponsorship for spring 2016 conference.	
Hearts with a Mission, Medford	\$5,000	St. Mark's Episcopal Church, Medford	\$5,000	Science Works Hands-On Museum, Ashland	\$15,000	Patrick Elementary School, Gold Hill	\$5,000	Oregon Stewardship, Medford	\$5,250
In support of hiring a case manager staff person at the new youth shelter in Grants Pass.		To purchase fresh foods to be distributed through the food pantry.		To bring local school children to the museum for interactive science programs.		In support of providing a year-long weekly art program to the students at the school.		In support of an Assistant Program Manager staff position.	
HOPE Equestrian Center, Eagle Point	\$6,000	St. Vincent de Paul Society, Medford	\$15,000	SMART (Start Making a Reader Today), Portland	\$5,000	Rogue Gallery & Art Center, Medford	\$7,500	Pacifica: A Garden in the Siskiyou, Williams	\$5,000
To provide scholarships to youth to participate in a therapeutic riding program.		To assist families who are in danger of having their utilities shut off.		In support of the SMART reading program in five Central Point elementary schools.		In support of the 2016 visual art exhibition series and its related programs.		Toward the replacement of the flooring in the Cedar Center facility.	
Jackson County Council Against Domestic & Sexual Violence, Medford	\$3,000	The Neighborhood Food Project, Ashland	\$5,800	Southern Oregon Child & Family Council, Central Point	\$17,000	Rogue River School District	\$5,000	Rogue Basin Partnership, Medford	\$4,000
Toward a website to coordinate domestic violence services in Jackson County.		In support of local Medford high schools and AARP members teaming up to recruit new donors and neighborhood coordinators.		In support of a family literacy program for Latino families.		To purchase snare, tenor and bass drums, sticks and harnesses for a drumline.		In support of the Rogue Basin Partnership Coordinator staff position.	
Jackson County Sexual Assault Response Team, Ashland	\$8,500	United Community Action Network (UCAN), Roseburg	\$4,500	Southern Oregon Education Service District, Medford	\$4,000	Rogue Valley Chorale Association, Rogue River	\$3,000	Sams Valley Elementary School, Central Point	\$4,500
In support of providing 24-hour response care to victims of sexual assault.		Toward providing classes to individuals on the rights and responsibilities of being a responsible renter.		In support of a Native Games Day at Southern Oregon University as well as other cultural activities throughout the year.		For costs associated with the performance of the Miza Azteca Concert.		Toward the purchase and installation of a double-sided LED reader board for school and community messages in Sams Valley.	
Junior League of Jackson County, Medford	\$3,000	United Way of Jackson County, Medford	\$20,000	Southern Oregon University, Ashland	\$25,000	Rogue Valley Symphony, Ashland	\$12,000	SCHOLARSHIPS	
To provide backpacks with nutritious food to low-income elementary school children for weekend meals.		In support of general operations.		In support of faculty development opportunities which improve teaching skills.		In support of the Chamber Players in the Classroom and Classical Coaches in the Classroom programs in local schools.		The following public high schools received funding for Carpenter Foundation Scholarships. The grants are administered by each school under contract with the Foundation.	
Lotus Rising Project, Ashland	\$3,000	Women's Crisis Support Team, Grants Pass	\$10,000	The Valley School of Southern Oregon, Medford	\$2,000	Siskiyou Violins, Medford	\$3,000	Ashland High School	\$14,400
In support of LGBT clubs in local schools and the All Ages Alternative Prom.		In support of a violence prevention education program in local high schools.		Toward the purchase of twenty Samsung Chromebooks for student use.		In support of general operations, student lessons, tuition assistance and board development.		Butte Falls High School	\$ 1,100
Magdalene Home, Medford	\$2,000	Yoga Blue Inc., Camarillo, CA	\$2,000	ARTS		Southern Oregon Film Society, Ashland	\$4,000	Central Point High School	\$16,500
For the Resident Emergency Fund.		In support of providing mind-body therapies at Armadillo Technical Institute and OnTrack.		Ballet Folklorico Ritmo Alegre, Talent	\$3,000	In support of a variety of art programs targeting underserved and rural communities.		Eagle Point High School	\$12,000
Maslow Project, Medford	\$10,000	EDUCATION		For programs to engage Latino families in the art and culture of Ballet Folklorico.		Southern Oregon Music Festival, Jacksonville	\$5,000	North Medford High School	\$21,500
To provide comprehensive case management services to homeless youth and families.		Bear Creek Watershed Education Partners, Ashland	\$1,500	Barnstormers Theatre Inc., Grants Pass	\$4,000	To provide musical instruments and instruction to local students, including those at the Jackson County Juvenile Justice Facility.		Phoenix High School	\$ 9,100
Medical Teams International, Portland	\$5,000	In support of a watershed symposium for local students.		Toward the purchase of LED track lighting and a new intercom system.		Southern Oregon Repertory Singers, Ashland	\$5,000	Prospect High School	\$ 1,100
To provide free dental services to low-income residents.		Classroom Law Project, Portland	\$4,000	Brava! Opera Theater, Ashland	\$5,000	In support of musician expenses, donor recognition events and lecture programs.		Rogue River High School	\$ 4,500
OnTrack Inc., Medford	\$15,000	Toward professional development for local teachers.		In support of several opera competitions and performances.		Youth Symphony of Southern Oregon, Medford	\$8,000	South Medford High School	\$19,800
Toward a new safe play area at the emergency housing facility in Grants Pass.		Consumer Credit Counseling Service of Southern Oregon, Medford	\$5,000	Britt Festivals, Medford	\$22,000	In support of general operations.		Rogue Community College Foundation, Grants Pass	\$25,000
Options for Southern Oregon Inc., Grants Pass	\$10,000	For a community outreach program providing financial literacy education.		In support of the 2016 Classical Music Festival.				For Jackson & Josephine County student scholarships.	
Toward renovating a building in Cave Junction to provide expanded mental health services.		Coyote Trails School of Nature, Medford	\$4,000	Collaborative Theatre Project Inc., Ashland	\$3,000				
		In support of an outdoor education program for 5th grade students.		Toward the purchase of portable lighting and sound equipment.					
				Grants Pass Museum of Art	\$7,000				
				Toward the purchase and installation of a new heat pump at the museum.					