

“The true meaning of life
is to plant trees, under whose
shade you do not expect to sit.”

Nelson Henderson

50 YEARS OF GROWING COMMUNITY



THE CARPENTER
FOUNDATION



“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.”

In Celebration

All organizations evolve over their life span, just like people, and that is certainly true of the Carpenter Foundation. Over 50 years, the Foundation, which began as a vehicle for personal giving by Helen and Alfred Carpenter, has developed into a stand-alone entity with established grant-making guidelines. As the third generation of the Carpenter family moves into the leadership role, non-family-member trustees take on greater responsibilities. Ours is an organization that has gone from its infancy in 1958 to mature adulthood in 2008. This is thanks to all those who contributed their efforts with thoughtfulness and generosity along the way.

Alfred and Helen Carpenter gave the funds and set up the foundation in 1958. Their goal was to “give back” and support and shape the community and causes they loved. Jane and Dunbar Carpenter picked up the mantle and spent countless hours nurturing nonprofit organizations with knowledge and compassion, managing financial resources, and developing a foundation that was open and accessible. Many public trustees have contributed their time and wisdom and have given the Foundation a far broader perspective.

The Carpenter Foundation does not work alone. We are in partnership with the myriad of nonprofit organizations in this two-county region that devote their efforts, financial and personal resources, and blood, sweat, and tears to serving and enriching our communities. We are in awe of the dedicated and committed individuals who believe strongly that it is their job to make our community better.

So we celebrate our 50th anniversary, honoring those who have gone before and anticipating the future.

Emily Carpenter Mostue
President
Carpenter Foundation



Sisters Karen Carpenter Allan and Emily Carpenter Mostue serve as Vice-President/Secretary and President, respectively, of the Carpenter Foundation.

“Responsibility does not only lie with the leaders of our countries or with those who have been appointed or elected to do a particular job. It lies with each of us individually.” — Dalai Lama

The Founders: Alfred and Helen Carpenter

American statesman Daniel Webster observed that, “When tillage begins, other arts will follow. The farmers, therefore, are the founders of civilization.” So it was with the Carpenters and the Rogue Valley: they came to farm – and cultivated both the land and the community.

Enticed from Colorado to Medford by family friend Reginald Parsons of Hillcrest Orchard, brothers Leonard and Alfred Carpenter planted a pear orchard in 1909, using a draft horse team. The Harvard-educated brothers knew little about agriculture. After college Leonard had been an electrical engineer, and Alfred had worked in the real estate and banking businesses. What they lacked in experience, however, they more than made up for with a strong work ethic, a vision of abundance, and a willingness to immerse themselves in study and learning. As a friend and reporter for the local paper noted, Alfred and Leonard “were charming, gracious men, unaffected and unassuming, and each possessed a subtle, sometimes off-beat but never mean, sense of humor.”

Their older brother, Dunbar F. Carpenter, followed Leonard and Alfred to Medford. Concerned about supporting his young family, Dunbar practiced law rather than joining his brothers in their orchard. After a few years, in 1917, Dunbar packed up his family, moving first to Berkeley, California, and then back to Boston to be closer to his wife’s family, leaving the pears and the Rogue Valley to his brothers.

By this time Alfred and Leonard were taking turns tending to their orchard. In 1920, Alfred set out to travel around the world, while Leonard and Winifred, his wife of three years, stayed behind to look after things. On his trip Alfred met and fell in love with the bright and gracious Helen Bundy, and they were married in Cairo in 1922. After living in Pasadena,



Alfred St. Vrain Carpenter



Helen Bundy Carpenter

*“Almost every good thing
you can think of in this
valley, they (Alfred and Helen)
had touched it.”*

— Shirley Patton, community leader



Brothers Alfred and Leonard Carpenter working their farm in 1910

California, for a few years, they returned to the Medford area in 1926. They bought land on Old Stage Road near Jacksonville, planted a small orchard, and built a large and inviting home they called "Topsides." Topsides became the site of numerous social events, often for the benefit of local organizations. Helen, an avid and talented gardener, created the lovely grounds around the home.

Alfred and Leonard and their wives were very community-minded. Leonard helped organize Southern Oregon Sales, a fruit-growers cooperative, and the Medford Irrigation District, both of which made the difference between success and failure for local orchardists. In addition, Leonard and Winifred's love of the arts prompted them to become patrons of many local cultural organizations.

Meanwhile, in 1942, Alfred and Helen Carpenter formed the Jackson County Recreation Committee to provide activities and entertainment for military personnel. They did this not only to help with the war effort but also to support their fellow citizens. With 40,000 servicemen stationed only a few miles away at Camp



The Carpenter brothers' home, including a water tower, on the hilltop overlooking their orchard at Hillcrest and Foothill Roads



White, many of Medford's 10,000 residents worked hard to keep the soldiers happy and engaged in positive pursuits. The Jackson County Recreation Committee acquired what is now the University Club, originally built and used by the Pacific Telephone Company, to provide a venue for entertainment.

Funding for the Recreation Committee came primarily from Helen. Her father, Harlow Bundy, and his brother had founded the Bundy Time Machine Company in Binghamton, New York, in 1889. This fledgling company grew and merged with several others to become IBM in 1924, making Helen and her two siblings the owners of some very valuable stock.

When World War II ended, so too did the need to entertain the Camp White servicemen. Alfred and Helen's charitable activities, however, continued unabated. They helped friends and contemporaries in need. They paid for worthy students to attend college. They were the major donors to the Community Hospital (later the Rogue Valley Memorial Hospital and now Rogue Valley Medical Center), the Red Cross chapter house in Medford, and the Carpenter Center for the Visual Arts at Harvard University. Many of their contributions were anonymous, and all were personal.

In 1958 the Jackson County Recreation Committee was reorganized as the Carpenter Foundation, evolving from a personal vehicle for charitable giving to a general purpose family foundation, with a board of five trustees. The Foundation's first grant recipients included the hospital and the Oregon Shakespeare Festival.



Alfred and Helen Carpenter at the 1958 groundbreaking for the Rogue Valley Medical Center on Barnett Road



Alfred and Helen Carpenter at "Topsides" with their children, Julie and Harlow

In what was to become a hallmark of the Carpenter Foundation, Alfred and Helen cared deeply about the organizations that the Foundation supported and contributed considerable time, as well as money, to strengthen them.

Alfred brought his farmer's work ethic to the Rogue Valley Medical Center board, on which he served for nearly 40 years, including 11 years as president. He envisioned and oversaw numerous expansions and construction projects, including a cancer treatment center and a coronary care unit, and he also developed a fund for newborn indigent care.



“Graciously yet firmly they (Alfred and Helen) have strengthened the fabric of this their chosen community, with threads of purpose, brightened it with the color of compassion.”

— The Red Cross chapter house dedication booklet, 1957

with the interior design. She was mindful of the needs of community members and insisted on a high-quality facility to serve them.

While Alfred always seemed to have a twinkle in his eye, Helen was a bit more formal. Dignified yet caring, Helen’s love of children and genuine interest in them was extraordinary. The third floor of Topsides was turned into a theatre in which her two children, Julie and Harlow, and their friends performed to Helen’s delight. Each summer Helen and Alfred would host a picnic for the Oregon Shakespeare Festival company, many of whom were college students. The young people were treated like honored guests and looked forward with great anticipation to the beautiful gardens, delicious food, and Alfred and Helen’s hospitality.

When Helen learned that the Festival’s outdoor theatre had been condemned, in part because water was draining into the area where the electricians worked,

she decided to help keep these “kids” safe. Alfred and Helen made a substantial grant to the Festival to rebuild the theatre, but they didn’t stop there. They insisted that the Festival challenge the citizens of Ashland to match the grant, encouraging the entire community to get involved.

Alfred took a personal interest in the hospital and its employees. Over many years he seldom missed his weekly visits, during which he toured the hospital, talking with employees and physicians. According to a 1975 hospital newsletter, “Mr. Carpenter was a man who never ran out of ideas about what the hospital should be doing, and he joined with others to ensure that it was done.” Helen contributed, too. When the hospital moved from downtown to its current location on Barnett Road, Helen stepped forward to help



Helen Carpenter, here with daughter Julie, loved children.

Alfred and Helen Carpenter believed that moving people to invest personally in the Festival would benefit the organization far more than a single grant would. And they were right: once the citizens rallied round the building of the new theatre, community pride soared, and vandalism and graffiti in the area decreased.

In typical fashion, Alfred and Helen worked behind the scenes, insisting that they receive no more notice than any other contributor. As a reporter and friend noted, "Alfred was not a public man in the usual sense. He was quiet, modest, almost shy. His genius was a sense of philanthropic fitness.... The two of them (Alfred and Helen) were generous – and wise in their generosity."

Although Helen died just three years after the Carpenter Foundation was established, she had already tilled the soil and planted the seeds of the Foundation's work. Helen's interests helped set lasting priorities for the Foundation – in human services, education, and the arts.

Alfred lived for another thirteen years, to the age of ninety-three. He and his second wife, Helene, as well as many relatives, continued the work that he and Helen had begun, quietly investing both time and money to benefit the community in which they lived and about which they cared deeply.

Dunbar and Jane Carpenter

Like Alfred and Helen before them, Dunbar and Jane Carpenter were good at growing things: crops, gardens, organizations, and the community.

Dunbar was born in Medford in 1915, after his father, Dunbar F. Carpenter, followed brothers Leonard and Alfred west. Young Dunbar didn't live in Oregon long, though, and grew up outside of Boston, graduating from Harvard with a degree in economics in 1937. Soon after, while living in Chicago, Dunbar met and married Jane Hoyman.

Jane had sailed to Cairo, Egypt, with her Presbyterian missionary parents when she was only five weeks old and spent most of her formative years there. She returned to the United States in high school, studied for her master's in social work at the University of Chicago, and was working as a social worker when she and Dunbar met.



Dunbar Carpenter checks Dunbar Orchards' pears.

The couple were well-matched, both extremely bright and hard-working but at the same time modest and kind. It was World War II, and they moved from Chicago to Oklahoma and then to South San Francisco, while Dunbar trained pilots and then flew Pan American clipper planes, mostly to Honolulu, for civilian contractors with the military.

Dunbar might have continued as a pilot, but in 1946 his aunt and uncle, Winifred and Leonard, then in their sixties, came to California to ask Dunbar if he would be interested in taking over their orchard in Southern Oregon. Dunbar was enthusiastic, certain that he would prefer farming to the sales jobs he'd had before the war. Jane, however, was hesitant. She worried about raising their children in a rural area, an experience so different from the cosmopolitan upbringing she had had. But move to Medford they did – and made it their home for the rest of their lives.



*“Jane never labored anything; she was quick on the spot. And Dunbar was the consummate gentleman.” — Harvey Bennett,
retired President, Rogue Community College*

As he had expected, Dunbar loved working the land. Over the years he grew pears, apples, hay, and wine grapes, and also raised beef cattle, pigs, and chickens. He became active in agricultural organizations, including the Oregon Horticultural Society, Medford Pear Shippers, and Oregon Egg Producers. Dunbar’s pear crate label revealed his whimsical nature: it featured a dapper pear flying down a snowy slope on skis, just as Dunbar himself loved to do.



Jane and Dunbar Carpenter brought style to every event.



Jane and Dunbar Carpenter led the Carpenter Foundation for nearly 40 years.

Alfred and Helen Carpenter welcomed Jane to Medford and encouraged her to get involved in her new community. Appalled to find a lack of human services, particularly for youth, in the Rogue Valley, Jane helped put a juvenile justice system in place. Later she pioneered children’s mental health services and launched a community action program that established the Rogue Valley’s first Head Start and Planned Parenthood programs.



Jane Carpenter made the Foundation her career.



In 1954, Dunbar and Jane built a home on a hill adjacent to their orchard. Always eager to learn something new, they immersed themselves in the design and planning to a degree that was unusual at that time. The house, which won an Award of Merit from *Sunset* magazine, was ahead of its time in many respects and said much about its owners: it featured a “great room,” where Dunbar, Jane, their three children, and friends could comfortably gather; it fit unobtrusively into its environment; it was constructed primarily of local materials; and it was elegant in its simplicity. Dunbar and Jane surrounded the house with carefully designed gardens that they themselves planted.

A few years later, in 1958, when Alfred and Helen Carpenter converted the Recreation Committee to the Carpenter Foundation, they asked Dunbar to be a trustee. He brought his gentle wisdom to the Foundation board for the next 50 years, many of those years as the Foundation’s treasurer. Jane replaced Helen on the Foundation board after Helen’s death in 1961 and served for the next 46 years.

Alfred and Helen’s children had moved far from Oregon, and Leonard and Winifred had no children. Thus, in the generation following Alfred and Helen, nephew Dunbar and his wife Jane were the only Carpenters living in Medford, the only ones in a position to manage the Foundation for the benefit of the community.

*“I just thoroughly enjoy working with people.” — Jane Carpenter,
in The Mail Tribune, 1995*



“Heroes are not giant statues framed against a red sky. They are people who say, ‘This is my community, and it’s my responsibility to make it better.’”

— Governor Tom McCall, speaking of Jane Carpenter

Jane and Dunbar Carpenter at home with their children, Emily, Karen, and Dunbar Scott, and the family dogs, Vicky and Juno, in the early 1960s

And Dunbar and Jane were worthy successors to Alfred and Helen, sharing their genuine concern for and interest in others, their uncanny ability to identify needs, and their humility, kindness, and compassion.

Jane led the Carpenter Foundation as its president from 1975 to 2005 – 30 of the Foundation’s 50 years. The Foundation became her career, and it was Jane more than anyone else who developed the Foundation’s distinctive character.

Having watched her parents run large and complex missions, including schools and hospitals, in Cairo and Asyut, Egypt, Jane had both a deep understanding of how organizations work and an innate sense that service to one’s community was an obligation. She was curious and was willing to dig through problems and find solutions. She had high standards. And she believed that, by



Governor Tom McCall asked Dunbar Carpenter to serve on the inaugural board of the Oregon Arts Commission.



Alfred and Leonard Carpenter's farmland in 1912

“Whatever was needed, Jane and Dunbar did.”

— Bill Moffat, community leader

working closely with nonprofit organizations to mentor and strengthen them, the Foundation could help the community help itself.

For many years, when applicants to the Carpenter Foundation came before the board for a required face-to-face interview, Jane's was the first face they would see. Always gracious, she had done her homework and was prepared for a frank and meaningful discussion of the applicant's needs and challenges. Jane developed the tradition of “The First Question,” and often asked it. According to friend and former Foundation trustee David Close, this question “was sometimes tough as nails, sometimes disarming, sometimes questioning, sometimes supporting, and always on target and gracefully delivered. It opened the floor for discussion and a continuing relationship.” And if the first question led to an application being rejected, the applicant organization left the meeting knowing what it needed to do to succeed, often with Jane's offer to help.

As strong as Jane was in her convictions, she respected others and believed in the wisdom of the larger group of Foundation trustees. She had deep in her bones John F. Kennedy's tenet that “leadership and learning are indispensable to each other.” Jane and Dunbar regularly disagreed about grant applications, Jane taking a more pragmatic approach and Dunbar a more optimistic one,

but they were both open-minded and came together to make decisions. Jane and Dunbar made sure that the Foundation's decisions were made with care, with respect for differing opinions and approaches, with warmth, and with humor.

Just as Alfred and Helen Carpenter had taken an active interest in growing and cultivating community organizations, Dunbar and Jane devoted countless hours to arts groups, social service agencies, and other civic organizations.

Dunbar served on the Oregon Shakespeare Festival Board, and during his term as president helped then-Executive Director Bill Patton, as Bill said, “in so many ways... just taking more time and interest than was normal for a board president.” In particular, Dunbar wanted to make sure that the nominating committee found board members with a passion for the theatre, so that the theatre would have good stewards for years to come. Dunbar was an early board member of the Rogue Valley Art Association (now Rogue Gallery & Art Center) and served as its treasurer for 30 years. He was also active in Craterian Performances, the Oregon Arts Commission, the National Endowment for the Arts, KDRV, Sabroso Company, and the Chamber of Commerce, among others.

Jane contributed her time to many organizations as well, including the state Board of Higher Education, the Oregon Shakespeare Festival, League of Women Voters, Friends of the University of Oregon Museum, and the Jackson County Community Action Agency. She served for 16 years on the Britt Festivals board, including a long stint as president.

Not surprisingly, Jane and Dunbar Carpenter's contributions to their community garnered many local and statewide awards. The Carpenters, however, were not terribly interested in awards and were quick to deflect attention away from themselves by noting that they were two among many involved in these activities. In 1985, Dunbar said that he and Jane accepted the Governor's Arts Award "on behalf of everybody who participates in the arts."

Neither of them liked the limelight, and Jane in particular shied away from it. She was much more interested in "the spade work," according to friend and Carpenter Foundation family trustee Bill Moffat. That is to say that Jane preferred to do the painstaking, unglamorous work – the important work that created the conditions in which others could flourish. Jane and Dunbar did what was needed. If chairs and tables needed to be moved for a Rogue Gallery & Art Center event, Dunbar moved them. If Britt Festivals needed housing for musicians, the Carpenters opened their home.

Dunbar and Jane were the master gardeners who grew the Carpenter Foundation and its community from the seedlings that Alfred and Helen had so lovingly planted. And Dunbar and Jane enriched the soil for future crops. Two of their three children live in Medford, and Dunbar and Jane involved them in the Foundation's work, beginning in the late 1970s. Daughters Emily Mostue and Karen Allan now serve as President of the Carpenter Foundation and Vice-President/Secretary, respectively.

Today Karen and Emily, along with their brother, Dunbar Scott Carpenter, and their families, tend the grapes of Rocky Knoll Vineyard, on the same land where Alfred and Leonard Carpenter settled and planted their pears almost a century ago.



The Carpenter farmland in 2006

The Carpenter Foundation Legacy

Grants

At the heart of the Foundation's work is its thoughtful and deliberate grant-making, its wise investments in the community.

The Carpenter Foundation makes 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.

Human Services

The Carpenter Foundation has always had a strong interest in human services. Some of Alfred and Helen Carpenter's earliest contributions, pre-dating the Foundation, were to the Red Cross to establish a local chapter house and to the Community Hospital (now Rogue Valley Medical Center). Alfred's nearly 40 years of service on the hospital board and their multiple financial contributions to the hospital demonstrate the depth of Alfred and Helen Carpenter's interest in helping others. Jane Carpenter shared their passion for social services and helped pioneer and then support many of the services for youth in Jackson County, from the juvenile court system to children's mental health programs. The Foundation has supported human services programs as varied as low-income health care, after-school programs, and court advocacy services for children. Today the Carpenter Foundation invests more in human services than in any other area.

"What delighted my heart was how the Foundation board - Jane, Dunbar and the rest of the family - wanted these agencies to succeed."

— Shirley Patton, community leader

"If you don't have services for people who need them, where are you? I have always been interested in what makes a community work."

— Jane Carpenter



Greenleaf Industries gives developmentally disabled clients work experience.



Mediation Works helps teens learn to resolve conflicts in a positive manner.

1942 - The Jackson County Recreation Committee is established by Alfred and Helen Carpenter to provide recreation for servicemen stationed at Camp White

1945 - WW II ends and with it the need to entertain the servicemen

1946 - Jane and Dunbar Carpenter and family move to Medford

1945 - The first general-purpose, electronic computer is built; it weighs nearly 30 tons and occupies more than 1,000 square feet

1946 - Dr. Spock publishes his landmark book on baby and child care

"The Carpenter Foundation has provided essential seed funding to a host of innovative human service projects in Jackson County. This long list includes OnTrack's HOME Program, which provides residential alcohol and drug treatment to mothers with their children, and Alan's House, which provides homes for those disabled with HIV-related diseases. The Foundation's willingness to take a risk on new and innovative programs has had a lasting and profound impact on the lives of our county's most vulnerable residents."

— Rita Sullivan, Executive Director, OnTrack, Inc.

"Students who are trained as Peer Mediators learn lifelong skills that will serve them personally in the years to come. They also develop self-confidence, poise, and leadership, as they serve in mediations between students."

"There have been 27 occasions during the 2006/07 school year which I am convinced would have ended in violence without the successful mediation program facilitated by Mediation Works."

— Two elementary school principals,
whose students have been trained by Mediation Works



La Clinica provides health care to some of the Rogue Valley's neediest residents.



The Multicultural Association's summer camp fosters cultural understanding.

50s

1954 - Alfred and Helen Carpenter's gift to the Rogue Valley Memorial Hospital prompts the board to move the hospital from East Main Street to its present location on Barnett Road

1958 - The foundation is reorganized and incorporated as The Carpenter Foundation, with a corpus of about \$1 million and with Helen Bundy Carpenter as president

1952 - The polio vaccine is created

1955 - Rosa Parks refuses to give up her seat on a bus

“Jane and Dunbar were instrumental in the founding of our organization over 20 years ago, and through their legacy, the Carpenter Foundation continues to support our mission of providing health care services to all in need. Quite simply, without the Carpenter Foundation’s support, La Clinica would not be caring for the most vulnerable residents in our community.”

— Maria Ramos Underwood,
Development Director, La Clinica



Preschoolers at the Family Nurturing Center can heal from emotional trauma, while their parents learn to care for them.



The childcare program at Coalition for Kids encourages early learning.

“The Carpenter Foundation played a critical role in making the dream of a Relief Nursery in Jackson County a reality. The willingness on the part of the Foundation to grant funds in the very earliest stages of the organization truly enabled us to get started.”

— Mary-Curtis Gramley,
Executive Director,
The Family Nurturing Center

1958 -The Foundation makes \$143,132.89 in grants in its first year of operation, including its first annual grant to the Oregon Shakespeare Festival

1959 - The Foundation makes its first grant for faculty scholarships to Southern Oregon State College

1961 -A high school scholarship program is established at three schools, and Jane joins the Foundation board

1961 - Helen Carpenter dies; Alfred becomes president

1963 – JFK is assassinated, and Martin Luther King gives his “I Have a Dream” speech



Education

The Carpenter Foundation believes that learning and living go hand in hand. In addition to an extensive college scholarship program, the Foundation makes grants to a wide variety of educational programs, in schools and elsewhere. And for more than 35 years faculty at Southern Oregon University have benefited from professional development grants, which enable them to present papers at conferences, conduct research, work toward advanced degrees, and otherwise enhance their knowledge and skills. By investing in these teachers, the Foundation has ultimately improved the educational experience of thousands of their students.

"The Foundation's investment in our faculty and their continued professional development is to my mind the best possible investment that could be made in the future of this institution. Without that key resource our college is nothing, with it everything is accomplishable."

— Written in 1989 by Joseph W. Cox, then-President of Southern Oregon State College (now Southern Oregon University)

"Southern Oregon Education Service District has been the recipient of grants for Project LISTO, which provides support for Hispanic parents and families to learn English and excel in school. The Carpenter Foundation has always taken the inclusive route to reach out to everyone in the community. We are thankful for the foresight, humanitarian outreach, and community enrichment that the Carpenter Foundation has embodied. We are a stronger community because of the Carpenter family."

—Steve Boyarsky, Superintendent, Southern Oregon ESD

The Eagle Mill Farming & Education Project teaches kids about growing food . ►



1964 - Alfred and Helen Carpenter's gifts to the Foundation, made over seven years (1958-1964), total nearly \$3 million

1970 - The Angus Bowmer Theatre opens at the Oregon Shakespeare Festival, named for the festival founder by donor Julie Carpenter Daugherty, daughter of Alfred and Helen

1968 - The Wild and Scenic Rivers Act passes, helping protect the Rogue River in Southern Oregon

1969 - Neil Armstrong becomes the first man on the moon

“With the help of the Carpenter Foundation grant we received, we were able to turn a small portion of a gravel parking lot into a space with 16 raised beds and a pumpkin patch. This garden has grown into a space where teachers collaborate with other classes and community members to till soil, plant food and flowers, and where we can just marvel at Earth’s abundance. For many students, this has been their first experience getting their hands dirty. They all take personal ownership of the garden and are very protective of our special garden space.”

— Jordan Saturen, teacher, Talent Elementary School

“When I first thought of a play, I imagined sophisticated old people sitting around in audiences acting too serious. I guess I made this assumption without knowing all the facts. The Ashland Shakespeare Festival has changed my outlook on Shakespearean ways and just plays in general.”

— Brianne, a student in the OSF Bowmer Project, a theatre education program in local schools supported by the Carpenter Foundation



Academia Latina encourages Latino youth to aspire to go to college.



For more than 20 years Planned Parenthood’s teen theatre has examined the lives of adolescents and encouraged them to act responsibly.

1972 - Public trustees are added to the Carpenter Foundation board

1975 - Jane Carpenter begins her term as president of the Foundation; she serves in this capacity for 30 years

1974 - Alfred Carpenter dies

1971 – Oregon’s innovative “bottle bill” is approved, the first container deposit legislation in the United States

1972 – The Watergate scandal begins

“Arts are very important ... they are essential – whether we know about them or not and whether we participate in them or not.” — Dunbar Carpenter

Arts

The Carpenter Foundation has a long-standing commitment to the arts, having supported the Oregon Shakespeare Festival for 50 years, Britt Festivals for 48 years, and the Rogue Gallery & Art Center for 42 years. Many Carpenter family members have served on the boards of these and other arts organizations, including Dunbar Carpenter’s nearly 30 years as treasurer of the Rogue Gallery & Art Center and his service on the inaugural board of the Oregon Arts Commission. Arts education, in particular, is a Carpenter Foundation priority. The Foundation supports projects that engage students with the visual and performing arts, often connecting participation in the arts to classroom learning.



Hundreds of students enjoy G. Valmont Thomas and Shona Tucker in the Oregon Shakespeare Festival’s 2008 production of *Fences*.
Photo by Jenny Graham



The Youth Symphony of Southern Oregon encourages excellence in student musicians.



The Craterian Ginger Rogers Theater was rebuilt in 1997 and is now Southern Oregon’s premiere community performing arts center.

1978 - Josephine County is added to the Foundation’s geographic granting area

80s



1986 - The Foundation publishes its first annual report, signaling its intention to be open to the community

1981 – Sandra Day O’Connor becomes the first woman on the Supreme Court

1981 – Personal computers (PC’s) are introduced by IBM

1989 – The Berlin Wall falls



▲ The Arts Council of Southern Oregon brings professional artists into local schools, giving children an opportunity to create.

"A grant from the Carpenter Foundation means more than dollars. In more than 50 years of supporting the Oregon Shakespeare Festival, the Carpenter Foundation and the Carpenter family have helped bring professional theatre and the power of live performance to thousands of young people and those of limited means living in Jackson and Josephine Counties. And it's not just theatre. I'm always keenly aware that the Foundation is a key player in the health of our entire community."

— Paul E. Nicholson, Executive Director, Oregon Shakespeare Festival

"Forty-eight years ago when the Rogue Valley Art Association was incorporated as a nonprofit, Alfred

Carpenter paid the first year's rent for the building on Main Street that became the Rogue Gallery. Dunbar Carpenter became the treasurer and served nearly 30 years in this capacity. In reading the history of the Rogue Gallery, it does not seem like an exaggeration to say that the gallery would not exist without the support of the Foundation and the Carpenter family... It was also at the encouragement of Jane Carpenter that we began applying for and receiving grants from other foundations."

— Judy Barnes, Executive Director, Rogue Gallery & Art Center

"I thought that the music would be boring, but it was grate! My favorite string instrument is the bass. I hope you come again."

— Jake, whose elementary school hosted members of the Rogue Valley Symphony Orchestra

"Being a local organization, the Carpenter Foundation has a unique understanding of our community's needs and a corresponding insight into our local not-for-profit infrastructure. As a result, the Foundation knows where to best invest its resources to produce the greatest results for the most people. The Foundation has helped improve our facilities, expand our services, and strengthen our sustainability."

— Stephen McCandless, Executive Director, Craterian Performances Company



Shayna Marie and Jackson Rowe played the young lovers in Oregon Stage Works' 2005 production of *Our Town*. Photo by Helga Motley



Performers from The Rogue Opera visit schools to introduce students to an unfamiliar art form.

1991 - The Foundation's corpus exceeds \$10 million



1990 The spotted owl is placed on the endangered species list, and timber revenues available to Oregon counties decline

1992 - The Carpenter Foundation hires its first paid staff person, Sabra Hoffman

1990 Measure 5 passes, limiting state property taxes and requiring equalization of school funding – the result of which is significant cuts to public education and other nonprofit services

Public Interest

As farmers and gardeners, generations of Carpenters have valued the land and been good stewards of the environment. In the early 1970s, Dunbar Carpenter, concerned about the negative effect on air quality of the smudge pots favored by orchardists at the time, pioneered the use of non-polluting irrigation sprinklers to combat frost damage. These sprinklers – and later wind machines – were adopted by Dunbar’s fellow orchardists, helping turn the Rogue Valley’s air from hazardous to healthy. Likewise, the Carpenter Foundation has long supported conservation programs, habitat restoration, and environmental education. The Foundation’s other public interest priorities include training and support for nonprofit organizations and community development.

“For nearly 30 years the Carpenter Foundation has supported The Nature Conservancy in Southwest Oregon by helping protect and restore key natural landscapes including Lower Table Rock, Agate Desert, Eight Dollar Mountain, Sharon Fen, Rough and Ready Preserve, and Round Top Butte. We have been fortunate to have the support of the Carpenter Foundation in protecting these special places, which in addition to preserving the area’s rich natural diversity, provide community members with open space and opportunities for natural history and environmental education. The Carpenter Foundation has been and remains a vital partner in the Conservancy’s commitment to the people and places that make Southwest Oregon so special.”

— Cynthia Beckwith, Associate Director of Philanthropy,
The Nature Conservancy

“The Carpenter Foundation has always been like an Old Friend to the West Medford Community Coalition. One who would support you, but at the same time tell you what you needed to do to improve. The Coalition looked to the Foundation not only for the funding of projects, but for the collective wisdom of the Board members in suggesting ways the Coalition projects could be improved.”

— Lenore Drake,
Board of Directors,
West Medford Community Coalition



The Nature Conservancy has helped protect Lower Table Rock, a Rogue Valley landmark and sensitive ecosystem.

2001 - The Foundation’s corpus exceeds \$20 million

2005 - Emily Mostue becomes the Foundation’s fourth president

2008 - Dunbar Carpenter dies

2007 – Jane Carpenter dies

2001 – Terrorists attack the World Trade Center and the Pentagon

2005 – Hurricane Katrina strikes the Gulf Coast

2008 – After 35 years, the 18-mile Bear Creek Greenway links Ashland, Talent, Phoenix, Medford, and Central Point

Scholarships

Alfred and Helen Carpenter provided college scholarships long before there was a Carpenter Foundation. They cared about young people and believed in opportunity – and they paid the tuition for teenagers they met who had drive and motivation but lacked the resources to attend college. They had no official scholarship program; rather Alfred and Helen did this informally and very quietly, without fanfare or recognition.

In the late 1950s the newly established Carpenter Foundation board asked Jane Carpenter, who was not yet on the board, to take on a research project: to talk with local high schools to see what might be done to assist their graduates. The Foundation did not assume that it knew best how to serve students but rather wanted to hear from the school community. From these conversations Jane developed a formal scholarship program for the Foundation, and in 1961 the first Carpenter Foundation scholarships were awarded to students at Crater, Medford, and Phoenix High Schools.

Over the years more schools were added, and the Foundation now grants scholarship funds to nine public high schools in Jackson County. Each school administers its own scholarship program under contract with the Foundation and determines the recipients and the amounts they receive. The amount of funding available to each school is proportional to its enrollment and currently totals about \$100,000 per year. In 2007 more than 190 students received scholarships.

Not including Alfred and Helen Carpenter's personal, behind-the-scenes support for students, the Foundation has awarded scholarships totaling almost \$3 million to more than 7,000 high school students.

The Carpenter Foundation scholarship program retains Alfred and Helen's imprint: it emphasizes both merit and need. And the program, although it has grown quite large, still has a personal connection: scholarship recipients report back to the Foundation on their college experiences. Their letters, excerpted on the following pages, are a testament to student achievement and to the true value of the Foundation's support for education.

In addition to its own scholarship program, the Foundation supports the Oregon Independent College Foundation, which provides scholarships for students from Southern Oregon to attend private colleges throughout the state.

"I can attest firsthand to the impact, both financial and personal, that the annual scholarship grants from the Carpenter Foundation have made on many of our most deserving and, in numerous cases, most needy seniors who hope to continue their education after high school but need financial assistance to do so.

The commitment of the Foundation has been generous, gracious, and selfless ... and provides graduating seniors not only with some meaningful funding for college but with a vote of confidence as well."

— Ralph Burrelle, scholarship chair for 22 years at Medford Senior High School/North Medford High School

Excerpts from scholarship letters:

"Please continue to reach out to other poor students like me who desperately desire to go to college but lack the means. Knowing that someone other than myself believes I can do it means the world to me."

— Aimee, 2008

"My grade point average raised from last term's 3.475 to 3.62. This only encourages me to study even harder this term and strive for a higher standard. I feel extremely lucky to be in college right now and especially in the Honors College program. Every day I learn more and more about myself and the world. My social life is quite wonderful. As you know, I live in the Honors Hall with many gifted and talented individuals who help me to grow more and more as I progress in my education. I run regularly, and Eugene has a lot to offer in terms of beautiful scenery. I'm very happy right now and extremely thankful for every source that makes it possible for me to attend school."

— Thea, 1994

"Your generosity has enabled me to pursue my academic dreams, and your support inspires my peers and me to strive for excellence. ... Education, to me, is a license to change the world. A good education can remove any impediment, while a poor education is like a set of blinders, narrowing the realms of possibility and promise. Let me assure you that I appreciate the value of my education. I will cherish it; I will use it to help my community. Thank you again for your generosity."

— Ana, 2008

This summer I had an incredible experience working with the developmentally disabled. I lived in a group home in Medford for 2 and 1/2 days of the week, helping these people with cooking, cleaning, doctor's appointments, and gave them their daily meds. I worked with people ages 20 to 50, all having chronic syndromes including autism, schizophrenia, depression and so forth... As a result of the summer experiences, I have made the decision to get a master's of Social Work. Shelly, 1997



Cari Snider, a Western Oregon University graduate and former scholarship recipient herself, now helps select Carpenter Foundation scholarship recipients at Eagle Point High School.



Kaysie LaLonde graduated from North Medford High School and now attends Southern Oregon University.

I am proud to be writing you the first letter of my senior year of college... Among the other courses I am taking, Interviewing and listening is perhaps the most valuable in terms of future application. The course is concentrating on developing effective interviewing skills, which will help in landing a good job one day. I have done one mock interview and can honestly say I have things to work on.

Benjamin, 1998



While majoring in biochemistry and molecular biology at Reed College in Portland, Henry Cooney has discovered the joys of alternative transportation.

Dear Mr. Dunbar Carpenter,

In 1963, your records will show that I was the joyful recipient of the A.S.V. Carpenter Foundation Award! Again, I say THANK YOU for helping me through college. Because of your generous assistance, I was able to attend Oregon State University during 1963-64; then I voluntarily transferred to Willamette University. Because of the help from Mrs. Jane Carpenter and you, Sir, I became an eager teacher; and I taught for 32 years, all in our great state of Oregon. It was a blessing to have taught in Jackson County.

— Richard Benner

"I am also taking introduction to Arabic. This will be my third language, as I am also fluent in both German and Chinese. These three languages I believe are great stepping stones in helping me to achieve my goal of having a job in the U.N. helping to better the United States' foreign relations. This dream is all possible by your support, and for that I truly thank you. I hope that in this next year and the many more to come that I can make your foundation proud and feel that you made a wise investment by investing in my future."

— Heather, 2007



Richard Benner received a Carpenter Foundation scholarship in 1963. He taught school in Oregon for 32 years.

Once again I thank you very much for all your financial aid. However, if you plan to send me a renewal application for next year, please don't do it. I would like you to send the application to another high school student who is in the same conditions as I was when I finished high school. As you know, when I finished high school I wasn't going to attend college because I didn't have my residency papers. However, you were a few of the people who didn't care about my status and gave the scholarship money, and because of that I was able to start college. Now, please help someone else who is like me... I am going to apply for other scholarships, and I am going to work really hard to finish an education because that is one of my biggest goals in life.

Armando, 1997

The Community

The Carpenter family's roots run deep in Southern Oregon. Family members have been active in social, agricultural, business, and philanthropic affairs in the Rogue Valley for nearly a century. They have planted and nurtured pears, grapes, hay, and more; while at the same time, they have used their Foundation to help grow the community. Just as farmers try to create the right conditions for their crops to flourish, the Carpenter Foundation seeks to strengthen organizations so that the community can thrive. The Foundation listens closely to what applicants say is needed in the region, and as the problems and opportunities change, the Foundation responds. Its long history, profound knowledge of the Rogue Valley, and close connection to the community have enabled the Carpenter Foundation to take a leadership role in mentoring other philanthropic organizations – thereby further cultivating a robust community.

In the words of community leaders:

"It's hard to imagine what this community would be like without the Carpenter Foundation. We see hundreds of children who have received arts education, thousands who have received health care and counseling, and individual organizations and people who have thrived personally and professionally thanks to the support of the Foundation."

— Dee Anne Everson, Executive Director,
United Way of Jackson County

"The Carpenter Foundation has led the way in Southern Oregon philanthropy. Because of the wide range of the foundation's activities, Carpenter is the trusted mentor to other funders. Because you know that Carpenter will always be there, it allows other foundations to explore and expand the scope of philanthropy in Southern Oregon."

— Burke Raymond, retired Jackson County Administrator



From Project Listo, a literacy program for Hispanic families



“I am of the opinion that my life belongs to the whole community and as long as I live, it is my privilege to do for it what I can.” — George Bernard Shaw

“I asked Jane what her vision for the Carpenter Foundation was. Her response was simple and direct: ‘To improve the ability of the community to make decisions on behalf of the community.’”

— David Close, retired Rector, St. Mark’s Episcopal Church

“What a revolutionary idea: to give low-income people resources to figure out their own solutions. This was my introduction to the Carpenter Foundation, and it follows a clear Carpenter Foundation pattern: creative and synergistic use of local resources that empower and sustain local community.”

— Carin Niebuhr, retired Director, Jackson County Commission on Children and Families

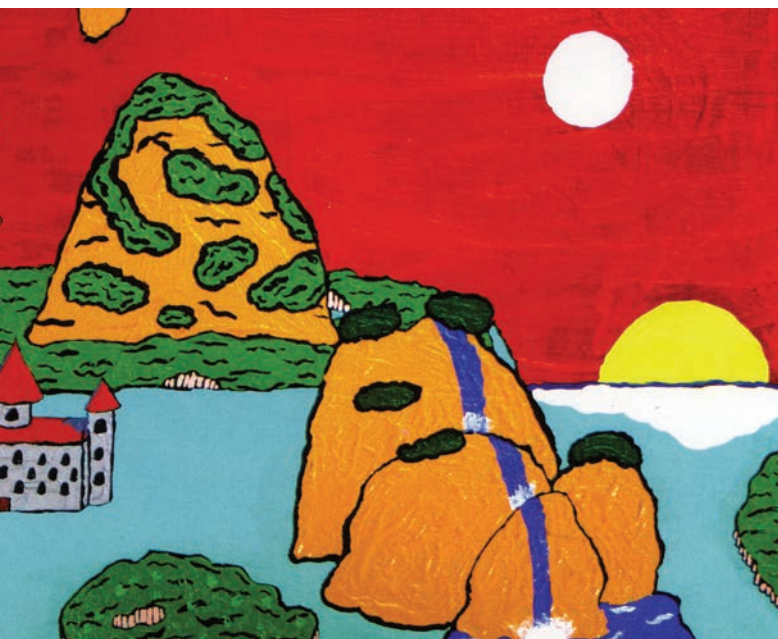
“Over the course of its history, the Carpenter Foundation has played many roles. It has been a catalyst, bringing together a set of ingredients (in this case needs, people, and resources) to effect change. It has been a conscience for our community, reminding us, when perhaps we were ill-disposed, to recognize the needs of others, whether a social injustice or human inequity. It has also been a stalwart friend, always there, year after year, strengthening our community institutions so that they might be more effective.”

— Stephen J. Reno, former President of Southern Oregon University

“A few of my favorite Carpenter things:

1. Budgets and numbers that add up correctly.
2. Working with boards that represent their communities.
3. Conversations with grant seekers.
4. Blending the passionate with the realistic.
5. Traditional and creative solutions tried here.
6. Breadth of grant making, partnering with community.”

— Bill Thorndike, President, Medford Fabrication



From Living Opportunities’ Studio Sfumato, a visual arts program for the developmentally disabled

“The strongest principle of growth lies in human choice.”

— George Eliot

Facts and Figures

In 50 years the Carpenter Foundation has ...

- Made more than 2,837 grants to Southern Oregon nonprofit organizations
- Awarded nearly \$19 million in grants
- Made grants ranging from \$2 for The Necktie Workers’ Association to \$100,000 for the Oregon Shakespeare Festival
- Supported the Oregon Shakespeare Festival for 50 years, Rogue Gallery & Art Center for 48 years, and Britt Festivals for 42 years
- Awarded \$3 million in college scholarship funds to nine high schools, supporting more than 7,000 high school students
- Provided SOU scholarship and faculty advancement grants totaling more than \$800,000
- Grown from \$1 million in assets to more than \$20 million
- Supported more than 568 nonprofit organizations, serving thousands of community members
- Benefited from the expertise of 38 public trustees, drawn from the local community
- Mentored, supported, and collaborated with more than 10 newer charitable foundations seeking to serve Southern Oregon, including the United Way, Gordon Elwood Foundation, and The Oregon Community Foundation

The Carpenter Foundation has grown tremendously, along with its community.

Year	1959	1975	1991	2007
Number of grants	57	31	71	98
Average grant	\$393	\$3,535	\$7,388	\$8,626
Total grants	\$22,428	\$109,585	\$524,611	\$845,376
Population of Jackson and Josephine Counties	103,879 (1960)	191,311 (1980)	209,038 (1990)	279,740 (2006)

Trustees and Staff

The Carpenter Foundation Trustees

The Carpenter Foundation has two kinds of trustees: family trustees and public trustees. There are six positions for family trustees and four positions for public trustees. Family trustees serve five-year terms, which are renewable without limit. Public trustees serve two-year terms and can serve a maximum of two terms.

Public trustees were added to the board in 1972. These thoughtful and engaged community members bring new ideas and new perspectives to the Foundation, while family members provide continuity and an understanding of history. The combination yields rich and lively discussions about the community and its needs and a well-reasoned approach to grant-making.

While most foundations make grants on an annual or semiannual basis, the trustees of the Carpenter Foundation meet quarterly to make grant decisions.

Family Trustees, 1958-2008

Karen Allan
Alfred Carpenter
Dunbar Carpenter
Harlow Carpenter
Helen Carpenter
Jane Carpenter
Ann Cheng
Robbie Collins
Julie Daugherty
Bill Moffat
Brian Mostue
Emily Mostue
Sue Naumes
Helene Carpenter Ogle
George Roberts

Public Trustees, 1972-2008

Eric Allen
Barbara Bean
Harvey Bennett
Pat Blair
Michael Brian
Kathy Burkey
David Close
Sue Cohen
Ginny Cotton
Jim DeCoursey
Hugh Dierker
Bill Duhaime
Robert Ellis
Mary Ellen Fleeger
Otto Frohnmayer
Jon Gell
Madeline Hill
Jeri Holt
Isobel Holt
Marjorie Kellogg
Sheila Kimball

*“The life of a man consists
not in seeing visions and in
dreaming dreams,
but in active charity and
in willing service.”*

— Henry Wadsworth Longfellow



2008 trustees and staff (l to r): Marc Sirinsky, Polly Williams, Lisa Wallis, Emily Mostue, Jon Gell, Jim DeCoursey, Sue Naumes, Dan Thorndike, Karen Allan, Bill Moffat

Nancy Leonard
Alicia MacArthur
Bill Moffat
Sue Naumes
Henry Padgham
Shirley Patton
Nancy Peterson
Ginny Post
Burke Raymond
Tom Rutter
Loren Sawyer
Mark Schively
David Seulean
Marc Sirinsky
Jim Sours
Bill Thorndike
Dan Thorndike

Foundation Staff

Program Officers:

Sabra Hoffman,
1992-1999

Polly Williams,
2000-present

Office Administrator/ Bookkeeper:

Lisa Wallis,
1999-present

The Carpenter Foundation gratefully acknowledges the following individuals and organizations who gave so graciously of their time in providing background information for this publication:

Harvey Bennett – retired President, Rogue Community College; former Carpenter Foundation trustee

Ralph Burrelle – Guidance Department Chair and Activities Director, North Medford High School

Ann Cheng – former Carpenter Foundation family trustee; Helen and Alfred Carpenter’s granddaughter

David Close – retired Rector, St. Mark’s Episcopal Church; former Carpenter Foundation trustee

Dee Anne Everson – Executive Director, United Way of Jackson County

Bill Moffat – family trustee and Treasurer, Carpenter Foundation

Carin Niebuhr – retired Director, Jackson County Commission on Children and Families

Bill Patton – retired Executive Director, Oregon Shakespeare Festival

Shirley Patton – actress; community activist; former Carpenter Foundation trustee

Burke Raymond – retired Jackson County administrator; former Carpenter Foundation trustee; Gordon Elwood Foundation trustee

Steve Reno – former President, Southern Oregon University; Chancellor, University System of New Hampshire

Bill Thorndike – President, Medford Fabrication; former trustee of Carpenter and Oregon Community Foundations; Northwest Area Foundation trustee

Academia Latina/Southern Oregon University

Arts Council of Southern Oregon – Lyn Godsey

Ashland Independent Film Festival – Tom Olbrich

CASA of Jackson County – Jennifer Mylenek

Coalition for Kids – Gina Marie Agosta

Craterian Performances Company – Stephen McCandless

Eagle Mill Farming & Education Project

Family Nurturing Center – Mary-Curtis Gramley

Grants Pass Family YMCA

Greenleaf Industries – David James

La Clinica – Maria Ramos Underwood

Living Opportunities/Studio Sfumato

Mediation Works – Mona Kool-Harrington

Multicultural Association of Southern Oregon

The Nature Conservancy – Cynthia Beckwith

OnTrack, Inc. – Rita Sullivan

Options for Southern Oregon, Inc. – Joe Serres

Oregon Shakespeare Festival – Paul E. Nicholson and Deborah Small

Oregon Stage Works

Planned Parenthood – Paul Robinson and Cil Stengel

Phoenix-Talent School District – Juanita Ephraim and Jordan Saturen

Project Listo – Southern Oregon ESD/Southern Oregon Head Start

Rogue Opera

Rogue Gallery & Art Center – Judy Barnes

Rogue Valley Symphony – Cybele Grimes

Scholarship recipients – Richard Benner, Henry Cooney, Kaysie LaLonde, and Cari Snider

The Siskiyou Institute

Society of St. Vincent de Paul – Len Hebert

Southern Oregon ESD – Steve Boyarsky

Southern Oregon Humane Society

West Medford Community Coalition – Marie Cabler, Louise Dix, and Lenore Drake

Youth Symphony of Southern Oregon – Sharon Wilson

Lisa Wallis – Office Administrator/Bookkeeper, Carpenter Foundation

Polly Williams – Program Officer, Carpenter Foundation

Photography, pages 1, 22, and 27 – Marc Sirinsky

*“It’s not just charity.
It’s another community
investment.
That’s really what a
foundation is.”*

— Jane Carpenter



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FOUNDATION

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