

## 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 accepted. Applications should include the following:

#### 1. Application Cover Sheet:

The Cover Sheet form is available on the Carpenter Foundation website - carpenter-foundation.org or from the office. Please fill out all the blanks on the cover sheet either on the website or on a printed form and submit with your application. **A cover letter is not necessary.**

#### 2. 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.

#### 3. 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](http://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](mailto:pwilliams@carpenter-foundation.org)

824 E. Main, Suite 102  
Medford, OR 97504

THE CARPENTER  
FOUNDATION



# THE CARPENTER FOUNDATION

## ANNUAL REPORT

2017 - 2018

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	2018	2017
Cash	18,082	39,425
Investments	19,320,900	18,869,738
Excise tax receivable	0	11,209
Deposit	3,715	3,636
Office equipment, net	5,048	6,595
<b>Total Assets</b>	<b>19,347,745</b>	<b>18,930,603</b>
Liabilities and Fund Balance		
Grants payable	215,500	117,500
Accrued Expenses	3,946	4,182
Excise tax payable	868	0
Deferred excise tax	23,200	15,900
Fund balance	19,104,231	18,793,021
<b>Total Liabilities and Fund Balance</b>	<b>19,347,745</b>	<b>18,930,603</b>

### STATEMENT OF ACTIVITIES

Years ended June 30

Revenue	2018	2017
Interest and dividends	633,416	453,603
Net realized & unrealized	(18,818)	318,338
Other income	78	74
<b>Total Revenue</b>	<b>614,676</b>	<b>772,015</b>
Expenditures		
Grants	774,527	751,278
Financial management	14,674	18,369
Administrative expenses	231,062	225,421
Federal excise tax	21,397	26,832
<b>Total Expenditures</b>	<b>1,041,660</b>	<b>1,021,900</b>
Excess of revenue over expenditures	(426,984)	(249,885)
<b>Fund balance beginning of year</b>	<b>18,793,021</b>	<b>17,158,465</b>
<b>Fund balance end of year</b>	<b>19,104,231</b>	<b>18,793,021</b>

The condensed financial statements were derived from audited (2017) and reviewed (2018) financial statements.

## BOARD OF TRUSTEES

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

## FOUNDATION STAFF

Polly Williams *Program Officer*  
Tammie Henriksen *Office Administrator*

THE CARPENTER FOUNDATION GRANT STATEMENT JULY 1, 2017 THROUGH JUNE 30, 2018

<b>HUMAN SERVICE</b>		<b>Maslow Project, Medford</b>	<b>\$10,000</b>	<b>Classroom Law Project, Portland</b>	<b>\$5,000</b>	<b>ARTS</b>		<b>Talent Elementary School</b>	<b>\$2,500</b>
<b>1st Phoenix Community Center</b>	<b>\$3,500</b>	In support of providing case management services to homeless youth and their families.		In support of two civic education programs: Project Citizen and the 2018 Summer Institute.		<b>Art in Bloom, Medford</b>	<b>\$4,000</b>	In support of purchasing fiddles and for instructor fees to start a fiddle band through the Outdoor Discovery Program.	
To purchase kitchen items and food staples for the community center.		<b>Neighborhood Food Project, Ashland</b>	<b>\$5,650</b>	<b>Consumer Credit Counseling Service of Southern Oregon, Medford</b>	<b>\$5,000</b>	In support of a matching grant to rent sound stages for performances during the 2018 Art in Bloom Festival.		<b>Youth Symphony of Southern Oregon, Medford</b>	<b>\$8,000</b>
<b>Access Inc., Medford</b>	<b>\$12,500</b>	In support of expanding and consolidating a program involving high school students who volunteer to recruit food donors for the program.		In support of providing financial education programs at various locations and outreach to increase visibility of programs and services.		<b>Ashland New Plays Festival, Ashland</b>	<b>\$4,000</b>	Toward operations, staff, training, rehearsal facility and venue fees, concert production, materials and marketing for the 2018-19 season.	
In support of staffing and basic equipment maintenance for the Medical Equipment Program.		<b>Options for Southern Oregon, Grants Pass</b>	<b>\$20,000</b>	<b>Crater School of Business, Innovation &amp; Science, Central Point</b>	<b>\$2,150</b>	<b>Ballet Folklorico Ritmo Alegre, Talent</b>	<b>\$5,000</b>	<b>PUBLIC INTEREST</b>	
<b>Addictions Recovery Center, Medford</b>	<b>\$15,000</b>	Toward the construction of a new mental health facility in Medford.		To support a program where students use various math and science skills to build their own guitar.		Toward the purchase and installation of new LED stage lighting for the theatre.		<b>Butte Creek Mill Foundation, Eagle Point</b>	<b>\$5,000</b>
In support of renovations for a new residential substance abuse facility for women and newborns.		<b>Oregon Lions Sight &amp; Hearing Foundation, Portland</b>	<b>\$5,000</b>	<b>Medford School District 549C</b>	<b>\$7,000</b>	<b>Barnstormers Theatre, Inc., Grants Pass</b>	<b>\$4,300</b>	Toward the restoration of the Ice House as part of the Butte Creek Mill re-construction project.	
<b>Ashland Culture of Peace Commission</b>	<b>\$5,000</b>	To provide vision screenings and referrals to children in Jackson & Josephine Counties.		To provide scholarship assistance to low-income youth to attend a week-long residential art program at Southern Oregon University.		In support of an Opera Masterclass, concerts and free tickets for youth programs.		<b>Greater Applegate Community Development</b>	<b>\$4,000</b>
Toward the recruitment and training of volunteers to operate the Ashland Winter Shelter.		<b>Peace House, Ashland</b>	<b>\$5,000</b>	<b>Oregon Alliance of Independent Colleges &amp; Universities, Lake Oswego</b>	<b>\$7,200</b>	In support of the 2018 Classical Music Festival and to provide reduced price tickets to low-income individuals.		In support of a solar educational outdoor classroom at Cantrall Buckley Park.	
<b>Ashland Emergency Food Bank</b>	<b>\$5,000</b>	In support of costs associated with providing a free dinner once a week to homeless and low-income people.		To provide local students with a scholarship to attend private colleges and universities in Oregon.		<b>Collaborative Theatre Project, Inc., Ashland</b>	<b>\$3,000</b>	<b>Greenleaf Industries, Grants Pass</b>	<b>\$12,000</b>
Toward the purchase of fresh foods to distribute to those in need.		<b>Phoenix Counseling Center</b>	<b>\$7,000</b>	<b>Oregon Museum of Science &amp; Industry, Portland</b>	<b>\$2,500</b>	In support of theatre productions and operating expenses.		For costs associated with creating the space to grow larger local native plants for use in watershed restoration projects.	
<b>CARE Foundation, Seattle, WA</b>	<b>\$3,000</b>	Toward costs associated with upgrading the internet, phone and computer system.		In support of bringing science education programs to local schools.		<b>Grants Pass Museum of Art</b>	<b>\$4,000</b>	<b>Jackson County Library System, Medford</b>	<b>\$3,000</b>
A grant made in memory of Helen Bundy Carpenter.		<b>Reaching Our Community (ROC), Grants Pass</b>	<b>\$10,000</b>	<b>Phoenix-Talent School District, Phoenix</b>	<b>\$15,300</b>	In support of bringing local 5th grade students to the museum for a field trip.		A grant to purchase books in memory of Alfred SV Carpenter.	
<b>CASA of Jackson &amp; Josephine Counties, Medford</b>	<b>\$15,000</b>	In support of staffing costs for the executive director and operations manager positions.		In support of a residential program at Southern Oregon University for Latino youth.		<b>JPR Foundation, Ashland</b>	<b>\$5,000</b>	<b>Jacksonville Community Center</b>	<b>\$5,000</b>
For staffing and administrative expenses to build organizational capacity.		<b>Resolve-Center for Dispute Resolution, Medford</b>	<b>\$6,000</b>	<b>Rogue Valley Farm to School, Ashland</b>	<b>\$6,000</b>	Toward fundraising costs to complete the renovation of the historic Holly Theatre.		In support of staffing costs to develop children's programs at the Community Center, as well as provide scholarships for children to attend them.	
<b>Children's Advocacy Center of Jackson County, Medford</b>	<b>\$5,000</b>	In support of a restorative justice program in local schools.		In support of providing garden education programs in local schools.		<b>Kids Unlimited, Medford</b>	<b>\$17,500</b>	<b>Josephine County, Grants Pass</b>	<b>\$5,000</b>
Toward the creation of a new strategic plan for the organization.		<b>Rogue Retreat, Medford</b>	<b>\$10,000</b>	<b>Roots &amp; Wings Child Development, Medford</b>	<b>\$4,800</b>	Toward the creation of a permanent dance studio.		Toward costs associated with renovating the commercial kitchen in the Pavilion Building at the Fairgrounds.	
<b>Crossing Bridges Therapeutic Riding Center, Grants Pass</b>	<b>\$3,000</b>	Toward the purchase of office equipment, technical equipment and software.		To complete the flooring replacement project at the preschool facility.		<b>Miracle Theatre Group, Portland</b>	<b>\$3,000</b>	<b>Mt. Ashland Association</b>	<b>\$5,000</b>
Toward the purchase of a tractor for use at the riding center.		<b>Rose Circle Mentoring Network, Ashland</b>	<b>\$2,500</b>	<b>Science Works Hands-On Museum, Ashland</b>	<b>\$15,000</b>	In support of a bilingual and bicultural arts residency program for local schools.		Toward costs associated with restoring the Mt. Ashland Lodge.	
<b>Family Nurturing Center, Medford</b>	<b>\$10,000</b>	Toward the expansion and strengthening of the Youth Mentoring Program.		In support of a variety of interactive science programs for local students.		<b>Oregon Shakespeare Festival Association, Ashland</b>	<b>\$25,000</b>	<b>Nonprofit Association of Oregon, Portland</b>	<b>\$8,000</b>
To expand relief nursery services in Josephine County to include home-based outreach services.		<b>Set Free Services, Medford</b>	<b>\$10,000</b>	<b>Siskiyou Field Institute, Selma</b>	<b>\$7,500</b>	In support of programs for local students to experience OSF.		In support of a series of trainings and seminars for local nonprofit staff and board members.	
<b>Grants Pass Sobering Center</b>	<b>\$5,000</b>	In support of providing a variety of human services to local homeless, elderly and working poor persons.		Toward the purchase of kitchen appliances for use in youth education programs and camps.		<b>Portland Opera</b>	<b>\$2,500</b>	<b>Oregon Nonprofit Leaders Conference, Medford</b>	<b>\$1,500</b>
In support of staff training, medical equipment, office equipment and supplies.		<b>Southern Oregon Jobs with Justice, Ashland</b>	<b>\$2,000</b>	<b>SMART (Start Making a Reader Today), Portland</b>	<b>\$6,000</b>	In support of a touring production of The Magic Flute in elementary schools in Jackson and Josephine Counties.		Sponsorship for the spring 2018 conference.	
<b>Heart &amp; Hope Music, Ashland</b>	<b>\$5,000</b>	In support of a free weekly community dinner at Pioneer Hall, and other meals for low income individuals.		In support of the SMART reading program in five Central Point elementary schools.		<b>Rogue Gallery &amp; Art Center, Medford</b>	<b>\$7,500</b>	<b>Pacifica: A Garden in the Siskiyou, Williams</b>	<b>\$10,000</b>
For general operating expenses.		<b>Spartan Boxing Club, Medford</b>	<b>\$6,000</b>	<b>Southern Oregon Child &amp; Family Council, Central Point</b>	<b>\$20,000</b>	In support of the 2018 visual art exhibition series and its related programs.		To complete the public restrooms at the Pacifica Community Building.	
<b>HIV Alliance, Eugene</b>	<b>\$3,000</b>	In support of hiring a consultant to work with the board of directors on a Strategic Plan.		In support of a family literacy program for Latino families.		<b>Rogue Valley Chorale Association, Medford</b>	<b>\$3,000</b>	<b>SCHOLARSHIPS</b>	
In support of HIV prevention services in Josephine County.		<b>St. Mark's Episcopal Church, Medford</b>	<b>\$6,000</b>	<b>Southern Oregon University, Ashland</b>	<b>\$25,000</b>	To support the commission of a concert in the Nahuatl language and for travel costs for the composer to come and work with the musicians.		The following public high schools received funding for Carpenter Foundation Scholarships. The grants are administered by each school under contract with the Foundation:	
<b>HOPE Equestrian Center, Eagle Point</b>	<b>\$8,000</b>	Toward the purchase of fresh foods and staple items to be distributed to persons in need.		In support of faculty development opportunities which improve teaching skills.		<b>Rogue Valley Symphony, Ashland</b>	<b>\$12,000</b>	<b>Ashland High School</b>	<b>\$14,400</b>
To provide scholarships for low-income individuals to participate in a therapeutic riding program.		<b>St. Vincent de Paul Society, Medford</b>	<b>\$15,000</b>	<b>Stories Alive, Ashland</b>	<b>\$2,000</b>	Toward the Classical Coaches in the Classroom and Discovery Concerts educational programs.		<b>Butte Falls High School</b>	<b>\$1,100</b>
<b>Jackson County Community Services Consortium, Medford</b>	<b>\$12,500</b>	To assist families in jeopardy of losing their utilities or whose utilities have already been turned off.		In support of a campus-wide immersive literacy program in local schools.		<b>Siskiyou Singers, Ashland</b>	<b>\$3,000</b>	<b>Central Point High School</b>	<b>\$16,500</b>
Toward staffing costs (through ACCESS) for a coordinator of the Continuum of Care working on homeless issues.		<b>United Way of Jackson County, Medford</b>	<b>\$20,000</b>	<b>The Dome School, Cave Junction</b>	<b>\$7,000</b>	To bring a nationally renowned musician and academic here to provide lectures and concert narrative in a concert focused on African-American spirituals.		<b>Eagle Point High School</b>	<b>\$12,000</b>
<b>Jackson County Sexual Assault Response Team, Ashland</b>	<b>\$10,000</b>	In support of general operations.		Toward sand and refinish the wood floors at the school.		<b>Southern Oregon Film Society, Ashland</b>	<b>\$6,000</b>	<b>North Medford High School</b>	<b>\$21,500</b>
In support of providing immediate care to victims of sexual assault.		<b>Zion Lutheran Church, Medford</b>	<b>\$7,000</b>	<b>White Oak Farm &amp; Education Center, Williams</b>	<b>\$3,000</b>	In support of a variety of educational film programs and competitions for local students.		<b>Phoenix High School</b>	<b>\$9,100</b>
<b>Josephine County Foundation, Murphy</b>	<b>\$1,200</b>	To cover the utility and maintenance costs of providing space to local AA and NA meeting groups.		To subsidize the cost of additional schools/groups to participate in educational field trips to the farm.		<b>Southern Oregon Guild, Cave Junction</b>	<b>\$3,500</b>	<b>Prospect High School</b>	<b>\$1,100</b>
Toward the construction of a room at Rogue River High School to provide free clothing and necessities to students.		<b>EDUCATION</b>		<b>Williams Community Forest Project</b>	<b>\$1,000</b>	Toward renovation of the layout and upgrading the furnishings in the Art Center.		<b>Rogue River High School</b>	<b>\$4,500</b>
<b>La Clinica del Valle, Medford</b>	<b>\$15,000</b>	<b>Ashland Schools Foundation</b>	<b>\$3,000</b>	In support of sending two educators to the Art of Mentoring training in Washington State.		<b>Southern Oregon Repertory Singers, Ashland</b>	<b>\$5,000</b>	<b>South Medford High School</b>	<b>\$19,800</b>
For start-up costs related to opening a school-based health clinic at Kids Unlimited Academy.		In support of a new after-school enrichment program in Ashland elementary schools.		<b>Woodland Charter School, Murphy</b>	<b>\$3,000</b>	In support of a variety of activities to develop and increase audience support.		<b>Rogue Community College Foundation, Grants Pass</b>	<b>\$25,000</b>
<b>Magdalene Home, Medford</b>	<b>\$3,000</b>	<b>Boys &amp; Girls Clubs of the Rogue Valley, Grants Pass</b>	<b>\$12,000</b>	Toward the purchase and installation of new playground equipment.				For Jackson & Josephine County student scholarships.	
In support of staff salaries for the Head Housemother and other staff.		In support of an after-school youth development program involving homework help, academic based activities, arts and crafts and physical activities.							