

## GRANT APPLICATION GUIDELINES

**Deadlines:** The Foundation Board meets quarterly. The deadline for grant applications is set about six weeks before each meeting. Call the office, (541) 772-5732, for 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.

Applications should include the following:

- Cover letter (no more than 1 page) 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.
- Proposal Information (**no more than 4 pages**)
  - description of proposal or project, and the community needs or strengths 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 990s 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:

711 East Main, Suite 10, 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 (541) 772-5732

[pwilliams@carpenter-foundation.org](mailto:pwilliams@carpenter-foundation.org)

711 East Main, Suite 10  
Medford, OR 97504

THE CARPENTER  
FOUNDATION



# THE CARPENTER FOUNDATION

## ANNUAL REPORT

2009 - 2010

MEDFORD, OREGON

## PRESIDENT'S REPORT

The major focus of the 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	2010	2009
Cash	32,448	166,197
Investments	15,764,066	14,784,073
Excise tax receivable	36,855	61,200
Office equipment, net	3,606	4,704
Total assets	15,836,975	15,016,174
<b>Liabilities and fund balance</b>		
Grants payable	111,500	139,423
Excise tax payable	0	0
Fund balance	15,725,475	14,877,151
<b>Total Liabilities and fund balance</b>	15,836,975	15,016,574

### STATEMENT OF ACTIVITIES

Years ended June 30

Revenue	2010	2009
Interest and dividends	343,400	591,114
Net realized & unrealized	(687,680)	(5,166,785)
Other income	0	1,006
<b>Total revenue</b>	(344,280)	(4,574,665)
<b>Expenditures</b>		
Grants	675,896	714,062
Financial management	15,373	18,614
Administrative expenses	205,067	226,528
Federal excise tax	25,795	(14,572)
Total expenditures	922,131	944,632
<b>Excess of revenue over expenditures</b>	(1,266,411)	(5,519,297)
<b>Fund balance beginning of year</b>	14,877,151	20,396,448
<b>Fund balance, end of year</b>	115,725,475	14,877,151

The condensed financial statements were derived from reviewed financial statements.

## BOARD OF TRUSTEES

Emily C. Mostue, *President*  
Karen C. Allan, *Vice President & Secretary*  
William R. Moffat, *Investment Manager and Treasurer*  
Jim DeCourcey  
John Forsyth  
Sue Naumes  
Marc Sirinsky  
Dan Thorndike

Polly Williams, *Program Officer*

CARPENTER FOUNDATION GRANTS – JULY 1, 2009 – JUNE 30, 2010

<b>HUMAN SERVICES</b>							
<b>The ALS Association, Portland</b>	\$3,000	To purchase medical equipment items to loan to persons living with ALS.	<b>Jackson County Community Services Consortium, Medford</b>	\$2,000	To provide classes to low-income individuals in how to become successful tenants.	<b>United Community Action Network (UCAN), Roseburg</b>	\$10,000
<b>Boys &amp; Girls Clubs of the Rogue Valley, Grants Pass</b>	\$15,000	In support of a program that provides free dinners and nutrition education to children.	<b>Jackson County Sexual Assault Response Team, Ashland</b>	\$10,000	Toward the salary of the executive director and for strategic planning costs.	<b>United Way of Jackson County, Medford</b>	\$25,000
<b>CARE, Atlanta, GA</b>	\$ 2,000	A Helen Bundy Carpenter Memorial Grant to promote self-help projects in developing nations.	<b>Josephine County Juvenile Justice Dept., Grants Pass</b>	\$5,000	In support of a coordinator to assist CASA volunteers to provide advocacy services to neglected and abused children.	<b>Winterspring Center, Medford</b>	\$3,500
<b>CASA of Jackson County, Medford</b>	\$12,000	To support a case supervisor staff position overseeing CASA volunteers.	<b>Kids Unlimited, Medford</b>	\$10,000	Toward the purchase and remodel of the Kids Unlimited facility.	<b>Women’s Crisis Support Team, Grants Pass</b>	\$6,500
<b>Center for Non-Profit Legal Services, Medford</b>	\$8,000	To take guardianship responsibilities for persons who are incapacitated due to age or physical/ mental disabilities.	<b>Lovejoy Hospice, Grants Pass</b>	\$5,000	To implement a program that provides support services to individuals and their families living with terminal illnesses.	<b>Yoga Blue, Camarillo, CA</b>	\$1,000
<b>Central Point School District</b>	\$3,000	For a part-time case manager to provide support for low-income students and families.	<b>Magdalene Home, Medford</b>	\$2,000	In support of mental health counseling services for pregnant young women.	<b>EDUCATION</b>	
<b>Children’s Dental Clinic of Jackson County, Medford</b>	\$5,900	To purchase an air compressor system for the new clinic.	<b>Medford School District</b>	\$10,000	In support of Project Dove, an in-school group counseling program for at-risk boys and girls.	<b>Ashland Family YMCA</b>	\$6,000
<b>Coalition for Kids, Grants Pass</b>	\$6,500	For costs associated with operating a multi-service center for low-income families.	<b>Mediation Works, Medford</b>	\$8,000	General operating support for providing mediation services and training.	<b>Butte Falls Community School Partnership</b>	\$5,000
<b>Common Ground Community Mediation Center, Grants Pass</b>	\$1,000	Toward conducting a comprehensive strategic planning process for the board and staff.	<b>Medical Teams International, Portland</b>	\$5,000	To bring a mobile dental van to Southern Oregon to provide free dental services.	<b>Crater Lake National Park Trust, Ashland</b>	\$4,000
<b>Community Works, Medford</b>	\$6,756	To hire relief staff to operate HelpLine crisis hotline when volunteers are not available.	<b>Mobility Unlimited, Medford</b>	\$3,000	Toward the purchase of mobility equipment for underinsured physically disabled working people.	<b>Gilder Lehrman Institute American History, New York</b>	\$2,500
<b>Faith House, Grants Pass</b>	\$1,000	Toward the remodel of the existing kitchen.	<b>Oregon Lions Sight &amp; Hearing Fnd., Portland</b>	\$5,000	In support of mobile health screening at various local sites.	<b>The Glass Rail Outfit, Cave Junction</b>	\$1,000
<b>Family Nurturing Center, Medford</b>	\$15,000	In support of a coordinator to work with families on the wait list for services.	<b>Phoenix Counseling Center</b>	\$5,000	For a parenting and family counseling program for families residing at the Salvation Army’s Hope House.	<b>The Job Council, Medford</b>	\$11,800
<b>First Christian Church of Grants Pass</b>	\$10,000	Toward staffing costs for the ROC Food Pantry serving low-income residents.	<b>Rogue Retreat, Medford</b>	\$ 7,500	To construct a classroom/meeting room at the supportive housing project.	<b>Little Butte School, Eagle Point</b>	\$4,000
<b>Glenridge Terrace Apartments, Medford</b>	\$2,000	Toward the purchase and installation of new computers for the Computer Learning Center.	<b>Rogue Valley Pregnancy Resources Center, Medford</b>	\$2,000	To purchase car seats to give to low-income pregnant women.	<b>Oregon Museum of Science &amp; Industry, Portland</b>	\$2,500
<b>Greenleaf Industries, Grants Pass</b>	\$8,000	Toward the replacement of two bridges on the nursery property.	<b>Rotary First Harvest of Oregon, Medford</b>	\$1,500	In support of a program that collects and delivers food to food banks, pantries and kitchens.	<b>OSU Extension Services, Central Point</b>	\$3,500
<b>Health Care Coalition of So OR, Medford</b>	\$15,000	To provide comprehensive prenatal and delivery services to low income women.	<b>Spiral Living Center, Cave Junction</b>	\$3,000	In support of a project coordinator, and a brochure for a gleaning program.	<b>Phoenix-Talent School District</b>	\$8,500
<b>Hearts &amp; Hope Musical Ministries, Ashland</b>	\$2,000	To provide group musical sessions in local elder care group homes.	<b>St. Vincent de Paul Society, Grants Pass</b>	\$5,000	To provide rent and utility assistance to local low-income families.	<b>Rogue Valley Foundation, Medford</b>	\$5,000
<b>HOPE Equestrian Center, Eagle Point</b>	\$5,000	To provide scholarships for children with disabilities to participate in a therapeutic riding program.	<b>St. Vincent de Paul Society, Medford</b>	\$11,500	To provide funds for low-income families to prevent their utilities from being disconnected.	<b>Roots &amp; Wings Child Development, Medford</b>	\$3,000
<b>Illinois Valley Safe House Alliance, Cave Junction</b>	\$7,500	In support of general operating costs.	<b>The Union, Grants Pass</b>	\$5,500	Toward rent for a drop-in center that serves the mentally ill, and for board strategic planning.	<b>Science Works Hands-On Museum, Ashland</b>	\$5,000
<b>The Inn Between, Grants Pass</b>	\$15,000	To purchase and remodel the building they currently occupy.				<b>Southern Oregon Child &amp; Family Council, Central Point</b>	\$17,000
						In support of Project Listo, a literacy program for Latino families.	
						<b>Southern Oregon Historical Society, Jacksonville</b>	\$4,500
						In support of a historical education program provided in local schools and at the Museum.	
						<b>Southern Oregon University, Ashland</b>	\$25,000
						In support of faculty development opportunities which improve teaching.	
						<b>TACS, Portland</b>	\$10,000
						For a series of training and educational programs for local nonprofit staff and board members.	
						<b>SCHOLARSHIPS</b>	
						The following public high schools received funding for Carpenter Scholarships. The grants are administered by each school under contract with the Foundation.	
						<b>Ashland High School</b>	\$14,400
						<b>Butte Falls High School</b>	\$ 1,100
						<b>Central Point High School</b>	\$16,500
						<b>Eagle Point High School</b>	\$12,000
						<b>North Medford High School</b>	\$21,500
						<b>Phoenix High School</b>	\$ 9,100
						<b>Prospect High School</b>	\$ 1,100
						<b>Rogue River High School</b>	\$ 4,500
						<b>South Medford High School</b>	\$19,800
						<b>Oregon Independent College Foundation, Portland</b>	\$6,500
						Scholarships for local students to attend private colleges and universities in Oregon.	
						<b>Rogue Community College, Medford and Grants Pass</b>	\$25,000
						For Jackson & Josephine County student scholarships.	
						<b>ARTS</b>	
						<b>Ashland Artisan Gallery &amp; Art Center</b>	\$2,000
						For costs associated with an arts education program for the local community.	
						<b>Britt Festivals, Medford</b>	\$20,000
						Support for 2010 classical music season.	
						<b>Camelot Theatre Company, Talent</b>	\$5,000
						Toward costs associated with the construction of a new theatre facility.	
						<b>Charitable Partnership Fund, Portland</b>	\$1,000
						In support of a week-long educational environmental project with South Medford High School.	
						<b>City of Ashland</b>	\$1,000
						Toward creation and installation the Peace Fence at Ashland Library.	
						<b>Dancing People Company, Ashland</b>	\$5,000
						In support of a residency dance program at local high schools.	
						<b>Illinois River Valley Arts Council, Cave Junction</b>	\$4,500
						To continue an educational arts program in Illinois Valley schools.	
						<b>Living Opportunities, Medford</b>	\$10,000
						Support for Studio Sfumato art programs for persons with developmental disabilities, and for art therapy for abused teens.	
						<b>Miracle Theatre, Portland</b>	\$1,500
						Towards a bilingual/bicultural theatre residency program at Crater High School.	
						<b>Multicultural Association of So OR, Medford</b>	\$1,500
						Toward bringing a professional dance instructor to work with the Ballet Folklorico Ritmo Alegre dancers and for costume updates.	
						<b>Oregon Shakespeare Festival, Ashland</b>	\$20,000
						In support of a special matinee program for students and seniors.	
						<b>Phoenix Elementary School</b>	\$2,500
						For a special art program at the school.	
						<b>Rogue Valley Opera, Medford</b>	\$6,000
						In support of Opera in the Schools, tickets for youth and Programs with SOU.	
						<b>Rogue Valley Symphony, Ashland</b>	\$8,000
						Toward musical programs and concerts for local schools.	
						<b>The Siskiyou Institute, Ashland</b>	\$3,000
						General support for the concert and workshop series.	
						<b>South Medford High School</b>	\$2,500
						To purchase a new piano for the school theatre.	
						<b>St. Clair Productions, Ashland</b>	\$1,500
						In support of the Rogue Valley Blues Festival and other concerts.	
						<b>Youth Symphony of Southern Oregon, Medford</b>	\$7,000
						For general operating and program costs	
						<b>PUBLIC INTEREST</b>	
						<b>Bear Creek Watershed Education Partners, Ashland</b>	\$1,500
						To support educational programs, office space and insurance.	
						<b>Cascade Community Pool, White City</b>	\$6,000
						For staff time to focus on various membership and fund development activities.	
						<b>Council on Foundations</b>	\$1,940
						Portion of membership dues that are used for charitable purposes.	
						<b>Disabilities Recreation Project, Talent</b>	\$1,000
						To create access to the Expo ponds and grounds for persons with physical disabilities.	
						<b>Jackson County Library System, Medford</b>	\$2,000
						An Alfred S.V. Carpenter Memorial grant to purchase books on selected topics.	
						<b>Klamath-Siskiyou Wildlands Center, Ashland</b>	\$1,000
						In support of a media campaign and educational program to promote the documentary “A Wild American Forest.”	
						<b>Netcorps, Eugene</b>	\$10,000
						To provide technical assistance and technology training to local nonprofit organizations.	
						<b>Oregon Nonprofit Leaders Conference, Medford</b>	\$1,500
						To support the 2010 Conference.	
						<b>Wildlife Images, Merlin</b>	\$5,000
						To assist in the transition from free entrance fees to paid admission.	