

# Oregon Foundation DataBook, 11th Ed. & Software SAMPLE PAGE & ORDER FORM

22 THE BRAEMAR CHARIT... © C&D Publishing 2012 OR Foundation DataBook, 11th Ed.

**The Braemar Charitable Trust** ① ✓ Independent

Trust Mngmt. Svcs—Po Box 1990, Waldport, OR 97394 Established 1994

URL: www.trustmanagementservices.net AG No. 20813

Contact: Ms. Mary Bird EIN 936272124

Phone: (541) 563-7279; email: MaryL@trustmanagementservices.net Fiscal Year: 9/30/10

Total Revenue: \$655,602  
Prog. Service: \$1,017,551  
Mgmt + Gen: \$222,066  
Fund balance: \$21,091,733

**Trustees:** Martha B. Cox, Beaverton; Hobart M. Bird, Portland; Melanie Ann Dawson, Portland.

**Purpose:** Trust Management Services (TMS) administers the Braemar Charitable Trust. TMS/Braemar funds non-profit organizations throughout Oregon, by region. Six Regions comprise the 36 counties in Oregon: Three Regions are funded annually, each county is funded biannually. TMS actively seeks grant applications with emphasis on Education, Community Service, Cultural, Youth Activities and Historical Preservation with funding to \$10,000. Grant applications for specific projects that will be completed in one year, have project budgets less than \$50,000 and contain an educational factor will be viewed more favorably than other requests.

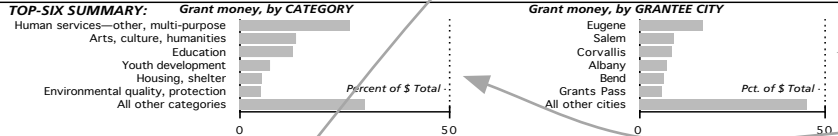
**Restrictions:** Maximum grant size: \$10,000. Must be a 501(c)(3) or equivalent. We Do Not Fund: Capital Campaigns; Individuals or Individual Scholarships; Endowments; Debt Retirement; Requests for General Operating Expenses; Salaries with the exception of those applied to a specific project; Projects with budgets greater than \$50,000.

**Geographic Focus:** State of Oregon.

**Deadlines:** Contact Trust Management Services for deadlines, which vary by region within the State of Oregon; also posted on website. Deadline Dates for 2012: February 15 for Mid Valley Region, including: Benton, Linn & Marion Counties (Decisions should be made by late May); June 1 for Central Oregon Region including: Crook, Deschutes, Hood River, Jefferson, Klamath, Lake, Sherman, & Wasco Counties (Decisions should be made by late August); August 15 for Portland Metro Region, including Clackamas, Columbia, Multnomah & Washington Counties (Decisions should be made by late November). Grant requests may be submitted up to 30 days prior to the deadline date, but must be postmarked no later than the deadline date.

**Published Info:** Other Info: Contact Trust Management Services for application requirements, either by phone or in writing. Application must be in writing; see website for specific application instructions. Note that TMS's role is to administer the small grants program; see the website for descriptions and restrictions for grant requests.

<b>Overview</b>	<b>Assets Rank:</b> 27	<b>Total # of Grants:</b> 116	<b>Largest:</b> \$25,000
<input checked="" type="checkbox"/> <b>Proof returned</b>	<b>Grants Rank:</b> 32	<b>Total Amount:</b> \$1,017,551	<b>Smallest:</b> \$1,955
<input checked="" type="checkbox"/> <b>RAG: COSW</b>	<b>Exp/Grants:</b> 21.8%	<b>Average Amount:</b> \$8,772	<b>Funded in Prior Edition:</b> 41%



GRANTEES, by Category	City, ST	\$ Amount	Purpose
<b>•Animal-related activities</b>		<b>20,000</b>	<b>(2.0% of total, Avg. = \$10,000)</b>
• Klamath Bird Observatory	Ashland, OR	10,000	School binding program.
• Oregon Zoo Foundation	Portland, OR	10,000	Overnights At The Zoo Program.
<b>•Arts, culture, humanities</b>		<b>137,707</b>	<b>(13.5% of total, Avg. = \$9,180)</b>
• A.C. Gilbert's Discovery Village	Salem, OR	10,000	Exhibit on veterinary science.
• Arts Central	Bend, OR	10,000	Strategic planning: Artist in the Schools program.
• Bandon Historical Society	Bandon, OR	10,000	Roof and sign repair. •Capital grant.
• Dancing People Company	Ashland, OR	8,000	Dance residency project; three high schools.
• Eugene Ballet Company	Eugene, OR	10,000	Trans \$ for school program.
• Eugene Symphony	Eugene, OR	5,000	School concert program.
• High Desert Museum	Bend, OR	10,000	Discovery Class series.
• Historical Outreach Foundation	Portland, OR	5,000	Historical presentations to schools.
• History Museum Of Hood River County	Hood River, OR	10,000	Large format reader/scanner/printer. •Capital grant.
• Jefferson County Historical Society	Madras, OR	6,787	Microform reader/printer/scanner internet.
• Kerbyville Museum	Kerby, OR	3,850	Heritage Days programs.
• Old Aurora Colony	Aurora, OR	6,070	Ten minute orientation video.
• Oregon Museum Of Science & Industry (OMSI)	Portland, OR	25,000	Camp Hancock upgrades. •Capital grant.
• Rogue Opera	Medford, OR	10,000	Schools Programs.
• Salem Art Association	Salem, OR	8,000	High School Intern Art Program.
<b>•Community improvement, development</b>		<b>35,000</b>	<b>(3.4% of total, Avg. = \$8,750)</b>
• Crook County Foundation	Prineville, OR	5,000	Town Talk Project.
• Greater Jefferson Community Center	10,000	Re-establish the computer lab.	
• Oregon Coast Community Action	Cross Bay, OR	10,000	CASA - recruit, train and support volunteers.
• South Benton County Enhancement	Monroe, OR	10,000	Art in the Park.
<b>•Education</b>		<b>130,317</b>	<b>(12.8% of total, Avg. = \$7,666)</b>
• Back In School	Roseburg, OR	2,361	Horsemanship and education program.
• Brighton Academy	Grants Pass, OR	6,906	Science equipment for First Aid Program.
• Central Point School District	Central Point, OR	9,436	Word processor lab.
• Friends Of The Albany Public Library	Albany, OR	4,703	Furnishings for the children's section.
• Friends Of The Curry Public Library	Gold Beach, OR		
• Harrisburg Library Guild	Harrisburg, OR		
• Lake County Library District	Lakeview, OR		
• Linn Benton Community College	Albany, OR		
• Melrose Elementary School	Roseburg, OR		
• Phoenix Talent School District	Phoenix, OR		
• Port Orford Public Library Foundation	Port Orford, OR		
• Powers School District #31	Powers, OR		
• Rogue Community College	Grants Pass, OR		

**FINANCIAL DATA** for each foundation shows assets, revenue, expenses and program service (grants) amount for fiscal year shown

**DETAILED INFORMATION**  
Each listing includes trustees, purpose, restrictions, geographic focus and other detail. **ALL THE GRANTS** for each profiled Foundation are included.

**OVERVIEW** shows Assets rank, Grants rank, expense to grants ratio, total number of grants, total amount, average, largest, smallest and percent funded in the prior edition.

**BAR CHARTS SHOW** all the Foundation's grants by CATEGORY and by LOCATION so you can see at a glance the granting patterns of each Foundation. **ALL THE DETAIL** is also included: grants are grouped by category, with subtotals for each category and the percentage of total grant dollars each category represents as well.

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