### Form 990

#### Return of Organization Exempt From Income Tax

**Department of the Treasury**  
**Internal Revenue Service**

**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**

- Do not enter Social Security numbers on this form as it may be made public.

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**For the 2013 calendar year, or tax year beginning**, 2013, and ending, 2013.

**B Check if applicable.**

- **C Name of organization**: SHENANDOAH COMMUNITY FOUNDATION
- **D Employer identification number**: 54-1963011
- **E Telephone number**: 540-459-7737
- **G Gross receipts $**: 481,933

**J Website**: [www.ShenandoahCF.org](http://www.ShenandoahCF.org)

**K Form of organization**: Corporation

<table>
<thead>
<tr>
<th>L Year of formation</th>
<th>M State of legal domicile</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>VA</td>
</tr>
</tbody>
</table>

#### Part I  
**Summary**

1. Briefly describe the organization’s mission or most significant activities:
   
   The Foundation promotes long-term charitable giving in Shenandoah County and surrounding areas. In 2013 more than $190,000 in scholarships and other grants were awarded and four new funds were in organization or finalized.

2. Check this box ☑️ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3. **Number of voting members of the governing body (Part VI, line 1a)**: 3
   
   12

4. **Number of independent voting members of the governing body (Part VI, line 1b)**: 4
   
   12

5. **Total number of individuals employed in calendar year 2013 (Part V, line 2a)**: 5
   
   0

6. **Total number of volunteers (estimate if necessary)**: 6
   
   52

7. **Total unrelated business revenue from Part VIII, column (C), line 12**: 7a
   
   0

7b **Net unrelated business taxable income from Form 990-T, line 34**: 0

8. **Contributions and grants (Part VIII, line 1h)**: 248,456
   
   313,179

9. **Program service revenue (Part VIII, line 2g)**: 0
   
   0

10. **Investment income (Part VIII, column (A), lines 3, 4, and 7c)**: 50,163
    
    106,108

11. **Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)**: 0
    
    0

12. **Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)**: 298,619
    
    413,287

13. **Grants and similar amounts paid (Part IX, column (A), lines 1–3)**: 125,849
    
    193,253

14. **Benefits paid to or for members (Part IX, column (A), line 4)**: 0
    
    0

15. **Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)**: 0
    
    0

16a. **Professional fundraising fees (Part IX, column (A), line 11e)**: 0
    
    0

17. **Total fundraising expenses (Part IX, column (D), line 25)**: **1,072**

18. **Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)**: 32,619
    
    34,943

19. **Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)**: 158,268
    
    228,236

20. **Revenue less expenses. Subtract line 18 from line 12**: 140,371
    
    185,051

21. **Beginning of Current Year**

22. **End of Year**

#### Part II  
**Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here**

<table>
<thead>
<tr>
<th>Signature of officer</th>
<th>Date</th>
</tr>
</thead>
</table>

**Paid Preparer Use Only**

<table>
<thead>
<tr>
<th>Print/Type preparer’s name</th>
<th>Preparer’s signature</th>
<th>Date</th>
<th>Check [ ] if self-employed</th>
<th>PTIN</th>
</tr>
</thead>
</table>

**May the IRS discuss this return with the preparer shown above? (see instructions)**

[ ] Yes [x] No

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 11282Y  
Form 990 (2013)
Part III  Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III.

1. Briefly describe the organization’s mission:
   The mission of the Shenandoah Community Foundation is to promote philanthropy in Shenandoah County and surrounding areas by connecting people who care with causes that matter.

2. Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?
   □ Yes   ☑ No
   If “Yes,” describe these new services on Schedule O.

3. Did the organization cease conducting, or make significant changes in how it conducts, any program services?
   □ Yes   ☑ No
   If “Yes,” describe these changes on Schedule O.

4. Describe the organization’s program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a. (Code:     ) (Expenses $     53,570 including grants of $     49,507 ) (Revenue $     0 )
   Unrestricted Grants Program providing grants to non-profit organizations that benefit Shenandoah County and its residents. 2013 grant recipients were:
   A Small Hand
   Bread of Life Food Pantry
   Columbia Furnace Love Center Food Pantry
   Compassion Cupboard
   Help with Housing
   Humane Society of Shenandoah County
   Jobs and Services Daily
   Loaves and Fishes
   Luke’s Backpack
   Mt. Olive & Shiloh UMC Enrich Program
   Open Door Food Pantry
   Response
   Shenandoah Alliance for Shelter
   Shenandoah County Free Clinic
   Shenandoah County Soccer League
   Skyline Community Action
   Smart Beccinimus, Shenandoah Valley Theatre
   VECCA
   Waxis Theatre

4b. (Code:     ) (Expenses $     70,223 including grants of $     65,125 ) (Revenue $     0 )
   Scholarship Program providing college and other post-secondary school scholarships to graduates of the Shenandoah County school system. 2013 scholarships were awarded from the following funds:
   Shenandoah Scholars Fund
   Maroe Movers Memorial Scholarship Fund
   4-H Dairy Club Fund
   Michael Morehead Memorial Scholarship Fund
   Jessica Pumptrey Memorial Scholarship Fund
   Colton T. Lindamood Memorial Fund
   Harry H. Combs Memorial Scholarship Fund
   John C. Cope Scholarship Fund
   Brandon Kelly Dawson Memorial Athletic Scholarship Fund
   Stonewall Jackson High School Alumni Fund
   Helene Albright Scholarship Fund
   Doris Knicey Scholarship Fund

4c. (Code:     ) (Expenses $     77,038 including grants of $     76,863 ) (Revenue $     0 )
   Grants from restricted funds providing grants for purposes other than post-secondary school scholarships:
   Donald H. Albright Fund
   Dr. John and Elizabeth Cottrell Fund
   Curtis L. Graves Fund
   Dr. Jacob and Diane Gardner Fund
   William C. (Ches) and Evelyn E. Lambert Memorial Fund
   Shenandoah County Free Clinic-Dr. Charles Miller Fund
   Herbert Parker Funds
   Punky Riley Memorial Youth Scholarship Fund

4d. Other program services (Describe in Schedule O.)
   (Expenses $     0 including grants of $     0 ) (Revenue $     0 )

4e. Total program service expenses  ▶  $200,831
<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td>1</td>
<td>Yes</td>
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<tr>
<td>2</td>
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<td>Yes</td>
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<td>10</td>
<td>Yes</td>
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</tbody>
</table>

**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part I.

Did the organization receive any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
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<tbody>
<tr>
<td>a</td>
<td>Yes</td>
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<tr>
<td>b</td>
<td>Yes</td>
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<tr>
<td>c</td>
<td>Yes</td>
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<td>d</td>
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<td>e</td>
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<td>18</td>
<td>Yes</td>
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<tr>
<td>19</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H.

If "Yes," to line 20a, did the organization attach a copy of its audited financial statements to this return?
### Part IV Checklist of Required Schedules (continued)

<table>
<thead>
<tr>
<th></th>
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<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>21</td>
<td>Did the organization report more than $5,000 of grants or other assistance to any domestic organization or government on Part IX, column (A), line 1? If “Yes,” complete Schedule I, Parts I and II</td>
<td>21</td>
<td>✓</td>
</tr>
<tr>
<td>22</td>
<td>Did the organization report more than $5,000 of grants or other assistance to individuals in the United States on Part IX, column (A), line 2? If “Yes,” complete Schedule I, Parts I and III</td>
<td>22</td>
<td>✓</td>
</tr>
<tr>
<td>23</td>
<td>Did the organization answer “Yes” to Part VII, Section A, line 3, 4, or 5 about compensation of the organization’s current and former officers, directors, trustees, key employees, and highest compensated employees? If “Yes,” complete Schedule J</td>
<td>23</td>
<td>✓</td>
</tr>
<tr>
<td>24a</td>
<td>Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year that was issued after December 31, 2002? If “Yes,” answer lines 24b through 24d and complete Schedule K. If “No,” go to line 25a</td>
<td>24a</td>
<td>✓</td>
</tr>
<tr>
<td>b</td>
<td>Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?</td>
<td>24b</td>
<td>✓</td>
</tr>
<tr>
<td>c</td>
<td>Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?</td>
<td>24c</td>
<td>✓</td>
</tr>
<tr>
<td>d</td>
<td>Did the organization act as an “on behalf of” issuer for bonds outstanding at any time during the year?</td>
<td>24d</td>
<td>✓</td>
</tr>
<tr>
<td>25a</td>
<td><strong>Section 501(c)(3) and 501(c)(4) organizations.</strong> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If “Yes,” complete Schedule L, Part I</td>
<td>25a</td>
<td>✓</td>
</tr>
<tr>
<td>b</td>
<td>Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization’s prior Forms 990 or 990-EZ? If “Yes,” complete Schedule L, Part I</td>
<td>25b</td>
<td>✓</td>
</tr>
<tr>
<td>26</td>
<td>Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If so, complete Schedule L, Part II</td>
<td>26</td>
<td>✓</td>
</tr>
<tr>
<td>27</td>
<td>Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If “Yes,” complete Schedule L, Part III</td>
<td>27</td>
<td>✓</td>
</tr>
<tr>
<td>28</td>
<td>Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>A current or former officer, director, trustee, or key employee? If “Yes,” complete Schedule L, Part IV</td>
<td>29a</td>
<td>✓</td>
</tr>
<tr>
<td>b</td>
<td>A family member of a current or former officer, director, trustee, or key employee? If “Yes,” complete Schedule L, Part IV</td>
<td>29b</td>
<td>✓</td>
</tr>
<tr>
<td>c</td>
<td>An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If “Yes,” complete Schedule L, Part IV</td>
<td>29c</td>
<td>✓</td>
</tr>
<tr>
<td>29</td>
<td>Did the organization receive more than $25,000 in non-cash contributions? If “Yes,” complete Schedule M</td>
<td>29</td>
<td>✓</td>
</tr>
<tr>
<td>30</td>
<td>Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If “Yes,” complete Schedule M</td>
<td>30</td>
<td>✓</td>
</tr>
<tr>
<td>31</td>
<td>Did the organization liquidate, terminate, or dissolve and cease operations? If “Yes,” complete Schedule N, Part I</td>
<td>31</td>
<td>✓</td>
</tr>
<tr>
<td>32</td>
<td>Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If “Yes,” complete Schedule N, Part II</td>
<td>32</td>
<td>✓</td>
</tr>
<tr>
<td>33</td>
<td>Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If “Yes,” complete Schedule R, Part I</td>
<td>33</td>
<td>✓</td>
</tr>
<tr>
<td>34</td>
<td>Was the organization related to any tax-exempt or taxable entity? If “Yes,” complete Schedule R, Part II, III, or IV, and Part V, line 1</td>
<td>34</td>
<td>✓</td>
</tr>
<tr>
<td>35a</td>
<td>Did the organization have a controlled entity within the meaning of section 512(b)(13)?</td>
<td>35a</td>
<td>✓</td>
</tr>
<tr>
<td>b</td>
<td>If “Yes” to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If “Yes,” complete Schedule R, Part V, line 2</td>
<td>35b</td>
<td>✓</td>
</tr>
<tr>
<td>36</td>
<td><strong>Section 501(c)(3) organizations.</strong> Did the organization make any transfers to an exempt non-charitable related organization? If “Yes,” complete Schedule R, Part V, line 2</td>
<td>36</td>
<td>✓</td>
</tr>
<tr>
<td>37</td>
<td>Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If “Yes,” complete Schedule R, Part VI</td>
<td>37</td>
<td>✓</td>
</tr>
<tr>
<td>38</td>
<td>Did the organization complete Schedule O and provide explanations in Schedule O for Part VII, lines 11b and 19? <strong>Note.</strong> All Form 990 filers are required to complete Schedule O</td>
<td>38</td>
<td>✓</td>
</tr>
<tr>
<td>Part V Statements Regarding Other IRS Filings and Tax Compliance</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>---------------------------------------------------------------</td>
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<tr>
<td>Check if Schedule O contains a response or note to any line in this Part V</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable</td>
</tr>
<tr>
<td>1b</td>
<td>Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable</td>
</tr>
<tr>
<td>1c</td>
<td>Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gambling winnings to prize winners?</td>
</tr>
<tr>
<td>2a</td>
<td>Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return</td>
</tr>
<tr>
<td>2b</td>
<td>If at least one is reported on line 2a, did the organization file all required federal employment tax returns?</td>
</tr>
<tr>
<td>3a</td>
<td>Did the organization have unrelated business gross income of $1,000 or more during the year?</td>
</tr>
<tr>
<td>3b</td>
<td>If “Yes,” has it filed a Form 990-T for this year? If “No” to line 3b, provide an explanation in Schedule O</td>
</tr>
<tr>
<td>4a</td>
<td>At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?</td>
</tr>
<tr>
<td>5a</td>
<td>Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?</td>
</tr>
<tr>
<td>5b</td>
<td>Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</td>
</tr>
<tr>
<td>6a</td>
<td>Did the organization solicit any contributions that were not tax deductible as charitable contributions?</td>
</tr>
<tr>
<td>6b</td>
<td>If “Yes,” did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?</td>
</tr>
<tr>
<td>7a</td>
<td>Organizations that may receive deductible contributions under section 170(c). Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?</td>
</tr>
<tr>
<td>7b</td>
<td>If “Yes,” did the organization notify the donor of the value of the goods or services provided?</td>
</tr>
<tr>
<td>7c</td>
<td>Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?</td>
</tr>
<tr>
<td>7d</td>
<td>If “Yes,” indicate the number of Forms 8282 filed during the year</td>
</tr>
<tr>
<td>7e</td>
<td>Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</td>
</tr>
<tr>
<td>7f</td>
<td>Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</td>
</tr>
<tr>
<td>7g</td>
<td>If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?</td>
</tr>
<tr>
<td>7h</td>
<td>If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?</td>
</tr>
<tr>
<td>8</td>
<td>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?</td>
</tr>
<tr>
<td>9</td>
<td>Sponsoring organizations maintaining donor advised funds. Did the organization make any taxable distributions under section 4966?</td>
</tr>
<tr>
<td>10</td>
<td>Section 501(c)(7) organizations. Enter:</td>
</tr>
<tr>
<td>10a</td>
<td>Initiation fees and capital contributions included on Part VIII, line 12</td>
</tr>
<tr>
<td>10b</td>
<td>Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</td>
</tr>
<tr>
<td>11</td>
<td>Section 501(c)(12) organizations. Enter:</td>
</tr>
<tr>
<td>11a</td>
<td>Gross income from members or shareholders</td>
</tr>
<tr>
<td>11b</td>
<td>Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)</td>
</tr>
<tr>
<td>12a</td>
<td>Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?</td>
</tr>
<tr>
<td>12b</td>
<td>If “Yes,” enter the amount of tax-exempt interest received or accrued during the year</td>
</tr>
<tr>
<td>13</td>
<td>Section 501(c)(29) qualified nonprofit health insurance issuers.</td>
</tr>
<tr>
<td>13a</td>
<td>Is the organization licensed to issue qualified health plans in more than one state?</td>
</tr>
<tr>
<td>13b</td>
<td>Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans</td>
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<tr>
<td>13c</td>
<td>Enter the amount of reserves on hand</td>
</tr>
<tr>
<td>14a</td>
<td>Did the organization receive any payments for indoor tanning services during the tax year?</td>
</tr>
<tr>
<td>14b</td>
<td>If “Yes,” has it filed a Form 720 to report these payments? If “No,” provide an explanation in Schedule O</td>
</tr>
</tbody>
</table>
Part VI  Governance, Management, and Disclosure  For each “Yes” response to lines 2 through 7f below, and for a “No” response to line 8a, b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI .........

Section A. Governing Body and Management

1a Enter the number of voting members of the governing body at the end of the tax year .......... Yes, 12
1b Enter the number of voting members included in line 1a, above, who are independent ...... Yes, 12
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? Yes
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? Yes
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? Yes
5 Did the organization become aware during the year of a significant diversion of the organization’s assets? Yes
6 Did the organization have members or stockholders? Yes
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? Yes
7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? Yes
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: a The governing body? Yes
8b Each committee with authority to act on behalf of the governing body? Yes
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization’s mailing address? If “Yes,” provide the names and addresses in Schedule O Yes

Section B. Policies  (This Section B requests information about policies not required by the Internal Revenue Code.):

10a Did the organization have local chapters, branches, or affiliates? Yes
10b If “Yes,” did the organization have written policies and procedures governing the activities of such chapters, branches, or affiliates, and to ensure their operations are consistent with the organization’s exempt purposes? Yes
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? Yes
11b Describe in Schedule O the process, if any, used by the organization to review this Form 990. Yes
12a Did the organization have a written conflict of interest policy? If “No,” go to line 13 Yes
12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? Yes
12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If “Yes,” describe in Schedule O how this was done Yes
13 Did the organization have a written whistleblower policy? Yes
14 Did the organization have a written document retention and destruction policy? Yes
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? Yes
15a The organization’s CEO, Executive Director, or top management official Yes
15b Other officers or key employees of the organization Yes
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? Yes
16b If “Yes,” to line 15a or 15b, describe the process in Schedule O (see instructions). Yes

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶
18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3) is only available for public inspection. Indicate how you made these available. Check all that apply.
✓ Own website □ Another’s website □ Upon request □ Other (explain in Schedule O)
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ▶ Guy A. Ackerson 540-477-9514 512 Beaver Lane Mt. Jackson, VA 22842

Form 990 (2013)
### Part VII  Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII.

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

**1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization’s **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization’s **current** key employees, if any. See instructions for definition of "key employee."

- List the organization’s five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations.

- List all of the organization’s **former** officers, key employees, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization’s **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $100,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☑ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>(C) Individual trustee or director</th>
<th>(D) Reportable compensation from the organization (W-3/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Jeffrey Dalke</td>
<td>President and Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(2) Jacob Haun, Jr.</td>
<td>Vice President and Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(3) Guy Ackerson</td>
<td>Treasurer and Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(4) Donald Albritt</td>
<td>Secretary and Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(5) John Adamson</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(6) Jerry Gerhardt</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(7) Dallas Bushong</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(8) David Fauspan</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(9) William Holtzma</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(10) Kevin Flins</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(11) Patsy Morehead</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(12) Adele Skolits</td>
<td>Director</td>
<td>✓</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>(13)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(14)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Part VII  Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week list any hours for related organizations below dotted line</th>
<th>(C) Position who is both an officer and a director/trustee in director/trustee</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(15)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(16)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(17)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(18)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(19)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(20)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(21)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(22)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(23)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(24)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(25)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1b Sub-total:  
2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization: 0

3 Did the organization list any former officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual: Yes / No: Yes

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? If "Yes," complete Schedule J for such individual: Yes / No: Yes

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person: Yes / No: Yes

### Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization’s tax year.

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization: 0
### Part VIII: Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII.

<table>
<thead>
<tr>
<th>Contribution, Gift, Grant, and Other Similar Amounts</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512, 514</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Federated campaigns</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>20,350</td>
</tr>
<tr>
<td>1b Membership dues</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1c Fundraising events</td>
<td>20,350</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1d Related organizations</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>1e Government grants (contributions)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>292,829</td>
</tr>
<tr>
<td>1f All other contributions, gifts, grants, and similar amounts not included above</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>292,829</td>
</tr>
<tr>
<td>1g Noncash contributions included in lines 1a-1f: $</td>
<td>68,471</td>
<td>0</td>
<td>0</td>
<td>68,471</td>
</tr>
<tr>
<td>1h Total, Add lines 1a-1f</td>
<td>313,179</td>
<td>0</td>
<td>0</td>
<td>313,179</td>
</tr>
<tr>
<td>2a Program Service Revenue</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3 Investment income (including dividends, interest, and other similar amounts)</td>
<td>42,494</td>
<td>42,494</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4 Income from investment of tax-exempt bond proceeds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>5 Royalties</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6a Gross rents</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6b Less: rental expenses</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6c Rental income or (loss)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6d Net rental income or (loss)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>7a Gross amount from sales of assets other than inventory</td>
<td>126,260</td>
<td>126,260</td>
<td>0</td>
<td>126,260</td>
</tr>
<tr>
<td>7b Less: cost or other basis and sales expenses</td>
<td>68,046</td>
<td>0</td>
<td>0</td>
<td>68,046</td>
</tr>
<tr>
<td>7c Gain or (loss)</td>
<td>57,614</td>
<td>0</td>
<td>0</td>
<td>57,614</td>
</tr>
<tr>
<td>7d Net gain or (loss)</td>
<td>57,614</td>
<td>0</td>
<td>0</td>
<td>57,614</td>
</tr>
<tr>
<td>8a Gross income from fundraising events (not including $20,350 of contributions reported on line 1c). See Part IV, line 18</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8b Less: direct expenses</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8c Net income or (loss) from fundraising events</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9a Gross income from gaming activities. See Part IV, line 19</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9b Less: direct expenses</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9c Net income or (loss) from gaming activities</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>10a Gross sales of inventory, less returns and allowances</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>10b Less: cost of goods sold</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>10c Net income or (loss) from sales of inventory</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Miscellaneous Revenue**

| Business Code | 0 |

**11a**

| Business Code | 0 |

**11b**

| Business Code | 0 |

**11c**

| Business Code | 0 |

**11d**

| Business Code | 0 |

**11e**

| Business Code | 0 |

**12 Total revenue, See instructions.**

| Business Code | 0 |

| Total revenue | 413,287 |
### Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX.

**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

<table>
<thead>
<tr>
<th></th>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grants and other assistance to governments and organizations in the United States, See Part IV, line 21</td>
<td>125,720</td>
<td>125,720</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to individuals in the United States, See Part IV, line 22</td>
<td>67,573</td>
<td>67,573</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to governments, organizations, and individuals outside the United States, See Part IV, lines 15 and 16</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (non-employees):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Legal</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accounting</td>
<td>1,500</td>
<td>1,500</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lobbying</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional fundraising services, See Part IV, line 17</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Investment management fees</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other, if line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O</td>
<td>18,754</td>
<td>6,712</td>
<td>12,042</td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
<td>4,065</td>
<td>4,065</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
<td>2,581</td>
<td>2,581</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
<td>4,125</td>
<td>4,125</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
<td>1,065</td>
<td>1,065</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24a</td>
<td>4-H Gallon of Milk Auction</td>
<td>1,072</td>
<td></td>
<td>1,072</td>
</tr>
<tr>
<td>24b</td>
<td>Dues &amp; Subscriptions</td>
<td>890</td>
<td></td>
<td>890</td>
</tr>
<tr>
<td>24c</td>
<td>Grants Reception</td>
<td>826</td>
<td>826</td>
<td></td>
</tr>
<tr>
<td>24d</td>
<td>All other expenses</td>
<td>65</td>
<td></td>
<td>65</td>
</tr>
<tr>
<td>25</td>
<td>Total functional expenses, Add lines 1 through 24e</td>
<td>228,236</td>
<td>200,831</td>
<td>26,333</td>
</tr>
</tbody>
</table>

**Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here if following SOP 98-2 (ASC 958-720).
## Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X.

<table>
<thead>
<tr>
<th></th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash—non-interest-bearing</td>
<td>93,029</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L.</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Notes and loans receivable, net</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>Inventories for sale or use</td>
<td>8</td>
</tr>
<tr>
<td>9</td>
<td>Prepaid expenses and deferred charges</td>
<td>9</td>
</tr>
<tr>
<td>10a</td>
<td>Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.</td>
<td>10a</td>
</tr>
<tr>
<td>10b</td>
<td>Less: accumulated depreciation</td>
<td>10b</td>
</tr>
<tr>
<td>11</td>
<td>Investments—publicly traded securities</td>
<td>1,905,631</td>
</tr>
<tr>
<td>12</td>
<td>Investments—other securities. See Part IV, line 11</td>
<td>12</td>
</tr>
<tr>
<td>13</td>
<td>Investments—program-related. See Part IV, line 11</td>
<td>13</td>
</tr>
<tr>
<td>14</td>
<td>Intangible assets</td>
<td>14</td>
</tr>
<tr>
<td>15</td>
<td>Other assets. See Part IV, line 11</td>
<td>15</td>
</tr>
<tr>
<td>16</td>
<td>Total assets. Add lines 1 through 15 (must equal line 34)</td>
<td>1,998,660</td>
</tr>
<tr>
<td>17</td>
<td>Accounts payable and accrued expenses</td>
<td>17</td>
</tr>
<tr>
<td>18</td>
<td>Grants payable</td>
<td>18</td>
</tr>
<tr>
<td>19</td>
<td>Deferred revenue</td>
<td>19</td>
</tr>
<tr>
<td>20</td>
<td>Tax-exempt bond liabilities</td>
<td>20</td>
</tr>
<tr>
<td>21</td>
<td>Escrow or custodial account liability. Complete Part IV of Schedule D.</td>
<td>21</td>
</tr>
<tr>
<td>22</td>
<td>Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L</td>
<td>22</td>
</tr>
<tr>
<td>23</td>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td>23</td>
</tr>
<tr>
<td>24</td>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td>24</td>
</tr>
<tr>
<td>25</td>
<td>Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D</td>
<td>25</td>
</tr>
<tr>
<td>26</td>
<td>Total liabilities. Add lines 17 through 25</td>
<td>26</td>
</tr>
<tr>
<td>27</td>
<td>Organizations that follow SFAS 117 (ASC 958), check here ▶ and complete lines 27 through 29, and lines 33 and 34.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Unrestricted net assets</td>
<td>28</td>
</tr>
<tr>
<td>29</td>
<td>Temporarily restricted net assets</td>
<td>29</td>
</tr>
<tr>
<td>30</td>
<td>Organizations that do not follow SFAS 117 (ASC 958), check here ▶ and complete lines 30 through 34.</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Capital stock or trust principal, or current funds</td>
<td>31</td>
</tr>
<tr>
<td>32</td>
<td>Paid-in or capital surplus, or land, building, or equipment fund</td>
<td>32</td>
</tr>
<tr>
<td>33</td>
<td>Retained earnings, endowment, accumulated income, or other funds</td>
<td>33</td>
</tr>
<tr>
<td>34</td>
<td>Total net assets or fund balances</td>
<td>34</td>
</tr>
<tr>
<td>35</td>
<td>Total liabilities and net assets/fund balances</td>
<td>35</td>
</tr>
</tbody>
</table>
### Part XI  Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain in Schedule O)</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))</td>
</tr>
</tbody>
</table>

### Part XII  Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

1. Accounting method used to prepare the Form 990: Cash ☑ Accrual ☐ Other ☐
   
   If the organization changed its method of accounting from a prior year or checked “Other,” explain in Schedule O.

2a. Were the organization’s financial statements compiled or reviewed by an independent accountant? ☑

   If “Yes,” check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:
   - Separate basis ☑
   - Consolidated basis ☐
   - Both consolidated and separate basis ☐

2b. Were the organization’s financial statements audited by an independent accountant? ☑

   If “Yes,” check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:
   - Separate basis ☐
   - Consolidated basis ☑
   - Both consolidated and separate basis ☐

2c. If “Yes” to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

   If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.

3a. As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? ☑

3b. If “Yes,” did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.
SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Attach to Form 990 or Form 990-EZ.

Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Name of the organization

Employer identification number

SHEPHERD COMMUNITY FOUNDATION

54-1963011

Part I  Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

1  ☐ A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).

2  ☐ A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)

3  ☐ A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).

4  ☐ A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iv). Enter the hospital's name, city, and state:

5  ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(v). (Complete Part II.)

6  ☐ A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(vii).

7  ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vii). (Complete Part II.)

8  ☑ A community trust described in section 170(b)(1)(A)(viii). (Complete Part II.)

9  ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.)

10 ☐ An organization organized and operated exclusively to test for public safety. See section 509(a)(4).

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a  ☐ Type I  b  ☐ Type II  c  ☐ Type III—Functionally integrated  d  ☐ Type III—Non-functionally integrated

e  ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f  ☐ If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box.

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?

(ii) A family member of a person described in (i) above.

(iii) A 35% controlled entity of a person described in (i) or (ii) above.

h  ☐ If the organization accepted any gift or contribution from any of the following persons, provide the following information about the supported organization(s):

<table>
<thead>
<tr>
<th>(i) Name of supported organization</th>
<th>(ii) EIN</th>
<th>(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))</th>
<th>(iv) Is the organization in col. (ii) listed in your governing document?</th>
<th>(v) Did you notify the organization in col. (iii) of your support?</th>
<th>(vi) Is the organization in col. (iii) organized in the U.S.?</th>
<th>(vii) Amount of monetary support</th>
</tr>
</thead>
</table>

(A)  
(B)  
(C)  
(D)  
(E)  

Total

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.
### Part II  Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

#### Section A. Public Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2009</th>
<th>(b) 2010</th>
<th>(c) 2011</th>
<th>(d) 2012</th>
<th>(e) 2013</th>
<th>(f) Total</th>
</tr>
</thead>
</table>
| 1 Gifts, grants, contributions, and membership fees received.  
   (Do not include any "unusual grants.") | 300,492 | 255,169 | 264,143 | 248,456 | 313,179 | 1,381,439 |
| 2 Tax revenues levied for the organization’s benefit and either paid to or expended on its behalf |         |         |         |         |         |         |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge |         |         |         |         |         |         |
| 4 Total. Add lines 1 through 3 | 300,492 | 255,169 | 264,143 | 248,456 | 313,179 | 1,381,439 |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) |         |         |         |         |         |         |
| 6 Public support. Subtract line 5 from line 4 |         |         |         |         |         |         |

#### Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2009</th>
<th>(b) 2010</th>
<th>(c) 2011</th>
<th>(d) 2012</th>
<th>(e) 2013</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Amounts from line 4</td>
<td>300,492</td>
<td>255,169</td>
<td>264,143</td>
<td>248,456</td>
<td>313,179</td>
<td>1,381,439</td>
</tr>
<tr>
<td>8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</td>
<td>28,814</td>
<td>42,615</td>
<td>36,802</td>
<td>42,413</td>
<td>42,494</td>
<td>193,138</td>
</tr>
<tr>
<td>9 Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Total support. Add lines 7 through 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,574,577</td>
</tr>
<tr>
<td>12 Gross receipts from related activities, etc. (see instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>13 First five years. If the Form 990 is for the organization’s first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
</tbody>
</table>

#### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th></th>
<th>(a) 2009</th>
<th>(b) 2010</th>
<th>(c) 2011</th>
<th>(d) 2012</th>
<th>(e) 2013</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Public support percentage for 2013 line 6, column (f) divided by line 11, column (f)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>74.95 %</td>
</tr>
<tr>
<td>15 Public support percentage from 2012 Schedule A, Part II, line 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>81.60 %</td>
</tr>
<tr>
<td>16a 33 1/3% support test—2013. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>16b 33 1/3% support test—2012. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>17a 10%-facts-and-circumstances test—2013. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the &quot;facts-and-circumstances&quot; test, check this box and stop here. Explain in Part IV how the organization meets the &quot;facts-and-circumstances&quot; test. The organization qualifies as a publicly supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>17b 10%-facts-and-circumstances test—2012. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the &quot;facts-and-circumstances&quot; test, check this box and stop here. Explain in Part IV how the organization meets the &quot;facts-and-circumstances&quot; test. The organization qualifies as a publicly supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
<tr>
<td>18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>✔</td>
</tr>
</tbody>
</table>
### Part III  Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II.
If the organization fails to qualify under the tests listed below, please complete Part II.)

#### Section A. Public Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2009</th>
<th>(b) 2010</th>
<th>(c) 2011</th>
<th>(d) 2012</th>
<th>(e) 2013</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Gross receipts from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 <strong>Total. Add lines 1 through 5</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7a Amounts included on lines 1, 2, and 3 received from disqualified persons</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>c Add lines 7a and 7b</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>8 Public support</strong> (Subtract line 7c from line 6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2009</th>
<th>(b) 2010</th>
<th>(c) 2011</th>
<th>(d) 2012</th>
<th>(e) 2013</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 Amounts from line 8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>c Add lines 10a and 10b</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>13 Total support. (Add lines 9, 10c, 11, and 12)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th>(a) Public support percentage for 2013 (line 8, column (f) divided by line 13, column (f))</th>
<th>15%</th>
</tr>
</thead>
<tbody>
<tr>
<td>(b) Public support percentage from 2012 Schedule A, Part III, line 15</td>
<td>16%</td>
</tr>
</tbody>
</table>

#### Section D. Computation of Investment Income Percentage

<table>
<thead>
<tr>
<th>Investment income percentage for 2013 (line 10c, column (f) divided by line 13, column (f))</th>
<th>17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment income percentage from 2012 Schedule A, Part III, line 17</td>
<td>18%</td>
</tr>
</tbody>
</table>

**19a 33½% support tests—2013. If the organization did not check the box on line 14, and line 15 is more than 33½%, and line 17 is not more than 33½%, check this box and stop here. The organization qualifies as a publicly supported organization.**

**19b 33½% support tests—2012. If the organization did not check the box on line 14 or line 19a, and line 16 is more than 33½%, and line 18 is not more than 33½%, check this box and stop here. The organization qualifies as a publicly supported organization.**

| Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions |   |
Part IV  Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).
Supplemental Financial Statements

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Part I  Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.
Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number at end of year</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Aggregate contributions to (during year)</td>
<td>68,169</td>
<td>18,885</td>
<td>12</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Aggregate grants from (during year)</td>
<td>61,750</td>
<td>8,351</td>
<td>15</td>
<td>16</td>
<td>17</td>
</tr>
<tr>
<td>Aggregate value at end of year</td>
<td>529,728</td>
<td>131,945</td>
<td>18</td>
<td>19</td>
<td>20</td>
</tr>
</tbody>
</table>

Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?  Yes □ No □

Did the organization inform all grantors, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?  Yes □ No □

Part II  Conservation Easements.
Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1. Purposes of conservation easements held by the organization (check all that apply).
   - Preservation of land for public use (e.g., recreation or education)
   - Preservation of an historically important area
   - Protection of natural habitat
   - Preservation of a certified historic structure
   - Preservation of open space

2. Complete lines 2a through 2d if the organization held a qualified conservation easement in the form of a conservation easement on the last day of the tax year.
   - Total number of conservation easements
   - Total acreage restricted by conservation easements
   - Number of conservation easements on a certified historic structure included in (a)
   - Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register

3. Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year

4. Number of states where property subject to conservation easement is located

5. Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?  Yes □ No □

6. Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year

7. Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year
   - $...

8. Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?  Yes □ No □

9. In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III  Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.
Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a. If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

1b. If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:
   - Revenues included in Form 990, Part VIII, line 1
   - Assets included in Form 990, Part X

2. If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:
   - Revenues included in Form 990, Part VIII, line 1
   - Assets included in Form 990, Part X
**Part III** Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization’s acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Public exhibition</td>
</tr>
<tr>
<td>b</td>
<td>Scholarly research</td>
</tr>
<tr>
<td>c</td>
<td>Preservation for future generations</td>
</tr>
<tr>
<td>d</td>
<td>Loan or exchange programs</td>
</tr>
<tr>
<td>e</td>
<td>Other</td>
</tr>
</tbody>
</table>

4 Provide a description of the organization’s collections and explain how they further the organization’s exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization’s collection?  

[ ] Yes [ ] No

**Part IV** Escrow and Custodial Arrangements.

Complete if the organization answered “Yes” to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  

[ ] Yes [ ] No

b If “Yes,” explain the arrangement in Part XIII and complete the following table:

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>c</td>
<td>Starting balance</td>
</tr>
<tr>
<td>d</td>
<td>Additions during the year</td>
</tr>
<tr>
<td>e</td>
<td>Distributions during the year</td>
</tr>
<tr>
<td>f</td>
<td>Ending balance</td>
</tr>
</tbody>
</table>

2a Did the organization include an amount on Form 990, Part X, line 21?  

[ ] Yes [ ] No

b If “Yes,” explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII.

**Part V** Endowment Funds.

Complete if the organization answered “Yes” to Form 990, Part IV, line 10.

<table>
<thead>
<tr>
<th></th>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Beginning of year balance</td>
<td>1,935,947</td>
<td>1,638,882</td>
<td>1,559,703</td>
<td>1,288,626</td>
<td>1,171,017</td>
</tr>
<tr>
<td>b Contributions</td>
<td>295,172</td>
<td>228,059</td>
<td>215,722</td>
<td>200,575</td>
<td>300,493</td>
</tr>
<tr>
<td>c Net investment earnings, gains, and losses</td>
<td>396,335</td>
<td>209,464</td>
<td>-19,738</td>
<td>183,614</td>
<td>-14,392</td>
</tr>
<tr>
<td>d Grants or scholarships</td>
<td>-193,293</td>
<td>-120,356</td>
<td>-99,188</td>
<td>-97,848</td>
<td>-156,857</td>
</tr>
<tr>
<td>e Other expenditures for facilities and programs</td>
<td>-1,073</td>
<td>-1,822</td>
<td>-1,848</td>
<td>-2,000</td>
<td>0</td>
</tr>
<tr>
<td>f Administrative expenses</td>
<td>-22,321</td>
<td>-18,280</td>
<td>-15,769</td>
<td>-13,264</td>
<td>-11,635</td>
</tr>
<tr>
<td>g End of year balance</td>
<td>2,410,767</td>
<td>1,935,947</td>
<td>1,638,882</td>
<td>1,559,703</td>
<td>1,288,626</td>
</tr>
</tbody>
</table>

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Board designated or quasi-endowment [ ] 100%</td>
</tr>
<tr>
<td>b</td>
<td>Permanent endowment [ ] 0%</td>
</tr>
<tr>
<td>c</td>
<td>Temporarily restricted endowment [ ] 0%</td>
</tr>
</tbody>
</table>

The percentages in lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>(i)</td>
<td>unrelated organizations [ ] Yes [ ] No</td>
</tr>
</tbody>
</table>
| (ii) | related organizations [ ] Yes [ ] No 3a(ii)  

b If “Yes” to 3a(ii), are the related organizations listed as required on Schedule R?  

[ ] Yes [ ] No 3b

4 Describe in Part XIII the intended uses of the organization’s endowment funds.

**Part VI** Land, Buildings, and Equipment.

Complete if the organization answered “Yes” to Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Land</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Buildings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c Leasehold improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)
### Part VII  Investments — Other Securities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) Closely-held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(A)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(B)</td>
<td></td>
<td></td>
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<tr>
<td>(C)</td>
<td></td>
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<tr>
<td>(D)</td>
<td></td>
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<tr>
<td>(E)</td>
<td></td>
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<tr>
<td>(F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(G)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(H)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total, (Column (b) must equal Form 990, Part X, col. (B) line 12.)

### Part VIII  Investments — Program Related.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
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<tr>
<td>(5)</td>
<td></td>
<td></td>
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<tr>
<td>(6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
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<tr>
<td>(8)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total, (Column (b) must equal Form 990, Part X, col. (B) line 13.)

### Part IX  Other Assets.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
</tbody>
</table>

Total, (Column (b) must equal Form 990, Part X, col. (B) line 15.)

### Part X  Other Liabilities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability | (b) Book value |
   (1) Federal income taxes    |                |
   (2)                         |                |
   (3)                         |                |
   (4)                         |                |
   (5)                         |                |
   (6)                         |                |
   (7)                         |                |
   (8)                         |                |
   (9)                         |                |

Total, (Column (b) must equal Form 990, Part X, col. (B) line 25.)

2. Liability for uncertain positions. In Part XIII, provide the text of the footnote to the organization’s financial statements that reports the organization’s liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII.
**Part XI**  Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.
Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part VIII, line 12:</td>
</tr>
<tr>
<td>a</td>
<td>Net unrealized gains on investments</td>
</tr>
<tr>
<td>b</td>
<td>Donated services and use of facilities</td>
</tr>
<tr>
<td>c</td>
<td>Recoveries of prior year grants</td>
</tr>
<tr>
<td>d</td>
<td>Other (Describe in Part XIII)</td>
</tr>
<tr>
<td>e</td>
<td>Add lines 2a through 2d</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part VIII, line 12, but not on line 1:</td>
</tr>
<tr>
<td>a</td>
<td>Investment expenses not included on Form 990, Part VIII, line 7b</td>
</tr>
<tr>
<td>b</td>
<td>Other (Describe in Part XIII)</td>
</tr>
<tr>
<td>c</td>
<td>Add lines 4a and 4b</td>
</tr>
<tr>
<td>5</td>
<td>Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)</td>
</tr>
</tbody>
</table>

**Part XII**  Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.
Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part IX, line 25:</td>
</tr>
<tr>
<td>a</td>
<td>Donated services and use of facilities</td>
</tr>
<tr>
<td>b</td>
<td>Prior year adjustments</td>
</tr>
<tr>
<td>c</td>
<td>Other losses</td>
</tr>
<tr>
<td>d</td>
<td>Other (Describe in Part XIII)</td>
</tr>
<tr>
<td>e</td>
<td>Add lines 2a through 2d</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part IX, line 25, but not on line 1:</td>
</tr>
<tr>
<td>a</td>
<td>Investment expenses not included on Form 990, Part VIII, line 7b</td>
</tr>
<tr>
<td>b</td>
<td>Other (Describe in Part XIII)</td>
</tr>
<tr>
<td>c</td>
<td>Add lines 4a and 4b</td>
</tr>
<tr>
<td>5</td>
<td>Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 16.)</td>
</tr>
</tbody>
</table>

**Part XIII**  Supplemental Information.
Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Part V, Line 4: The Foundation's endowment funds serve various purposes. For example, some provide annual grants to specified organizations such as the Fort Valley Community Center, the Fort Valley Museum, and the Shenandoah County Library Archives. Others provide scholarships to graduating seniors of the County's high schools. The Unrestricted Grants Fund provides annual grants to various organizations for the benefit of the County and its residents. Still others are intended to grow revenues to provide future funding for the Foundation's grant programs and administrative expenses.
**Part I  Fundraising Activities.** Complete if the organization answered “Yes” to Form 990, Part IV, line 17.  
Form 990-EZ filers are not required to complete this part.

1. Indicate whether the organization raised funds through any of the following activities. Check all that apply.
   - [ ] Mail solicitations
   - [ ] Internet and email solicitations
   - [ ] Phone solicitations
   - [ ] In-person solicitations
   - [ ] Solicitation of non-government grants
   - [ ] Solicitation of government grants
   - [ ] Special fundraising events

2. Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?  
   - [ ] Yes  [ ] No
   - If “Yes,” list the ten highest paid individuals or entities ( fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

<table>
<thead>
<tr>
<th>(i) Name and address of individual or entity (fundraiser)</th>
<th>(ii) Activity</th>
<th>(iii) Did fundraiser have custody or control of contributions?</th>
<th>(iv) Gross receipts from activity</th>
<th>(v) Amount paid to (or retained by) fundraiser listed in col. (i)</th>
<th>(vi) Amount paid to (or retained by) organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
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<tr>
<td>4</td>
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<tr>
<td>5</td>
<td></td>
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<tr>
<td>6</td>
<td></td>
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<td></td>
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<tr>
<td>7</td>
<td></td>
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<tr>
<td>8</td>
<td></td>
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<tr>
<td>9</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

---

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.  
Cat. No. 50083H  
Schedule G (Form 990 or 990-EZ) 2013
### Part II  
**Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

<table>
<thead>
<tr>
<th>Revenue</th>
<th>(a) Event #1</th>
<th>(b) Event #2</th>
<th>(c) Other events</th>
<th>(d) Total events (add col. (a) through col. (c))</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gross receipts</td>
<td><strong>20,350</strong></td>
<td></td>
<td></td>
<td><strong>20,350</strong></td>
</tr>
<tr>
<td>2 Less: Contributions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Gross income (line 1 minus line 2)</td>
<td><strong>20,350</strong></td>
<td></td>
<td></td>
<td><strong>20,350</strong></td>
</tr>
<tr>
<td>4 Cash prizes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Noncash prizes</td>
<td></td>
<td><strong>75</strong></td>
<td></td>
<td><strong>75</strong></td>
</tr>
<tr>
<td>6 Rent/facility costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Food and beverages</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Entertainment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Other direct expenses</td>
<td><strong>997</strong></td>
<td></td>
<td></td>
<td><strong>997</strong></td>
</tr>
<tr>
<td>10 Direct expense summary. Add lines 4 through 9 in column (d)</td>
<td></td>
<td></td>
<td></td>
<td><strong>1,672</strong></td>
</tr>
<tr>
<td>11 Net income summary. Subtract line 10 from line 3, column (d)</td>
<td></td>
<td></td>
<td><strong>19,278</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Part III  
**Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

<table>
<thead>
<tr>
<th>Revenue</th>
<th>(a) Bingo</th>
<th>(b) Pull tab/instant bingo/progressive bingo</th>
<th>(c) Other gaming</th>
<th>(d) Total gaming (add col. (a) through col. (c))</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gross revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Cash prizes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Noncash prizes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Rent/facility costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Other direct expenses</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Volunteer labor</td>
<td>□ Yes % □ No</td>
<td>□ Yes % □ No</td>
<td>□ Yes % □ No</td>
<td></td>
</tr>
<tr>
<td>7 Direct expense summary. Add lines 2 through 5 in column (d)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Net gaming income summary. Subtract line 7 from line 1, column (d)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9 Enter the state(s) in which the organization operates gaming activities:
   a. Is the organization licensed to operate gaming activities in each of these states? □ Yes □ No
   b. If "No," explain: ____________________________________________________________

10a Were any of the organization’s gaming licenses revoked, suspended or terminated during the tax year? □ Yes □ No
   b. If "Yes," explain: ____________________________________________________________

Schedule G (Form 990 or 990-EZ) 2013
11 Does the organization operate gaming activities with members? □ Yes □ No
12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity
    formed to administer charitable gaming? □ Yes □ No
13 Indicate the percentage of gaming activity operated in:
   a The organization's facility .................................................. %
   b An outside facility ............................................................. %
14 Enter the name and address of the person who prepares the organization's gaming/special events books and
    records:
    Name ▶
    Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming
       revenue? □ Yes □ No
   b If “Yes,” enter the amount of gaming revenue received by the organization ▶ $ and the amount of gaming revenue
      retained by the third party ▶ $
   c If “Yes,” enter name and address of the third party:
    Name ▶
    Address ▶

16 Gaming manager information:
    Name ▶
    Gaming manager compensation ▶ $
    Description of services provided ▶
    □ Director/officer □ Employee □ Independent contractor

17 Mandatory distributions:
   a Is the organization required under state law to make charitable distributions from the gaming proceeds to
      retain the state gaming license? □ Yes □ No
   b Enter the amount of distributions required under state law to be distributed to other exempt organizations or
      spent in the organization's own exempt activities during the tax year ▶ $

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v), and
Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).
**SHENANDOAH COMMUNITY FOUNDATION**

**Part I: General Information on Grants and Assistance**

1. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? [ ] Yes [ ] No

2. Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II: Grants and Other Assistance to Governments and Organizations in the United States**

<table>
<thead>
<tr>
<th>No.</th>
<th>Name and address of organization or government</th>
<th>EIN</th>
<th>IRC section (if applicable)</th>
<th>Amount of cash grant</th>
<th>Amount of non-cash assistance</th>
<th>Method of valuation (book, FMV, appraisal, other)</th>
<th>Description of non-cash assistance</th>
<th>Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td>Neip with Housing, PO Box 124, Berryville, VA 22611</td>
<td>54-1485313</td>
<td>501(c)(3)</td>
<td>$6,000.00</td>
<td></td>
<td></td>
<td></td>
<td>Low-Income Home Repair</td>
</tr>
<tr>
<td>(2)</td>
<td>Small Hand/Editions Christian Church, 210 Edinburg, VA 22824</td>
<td>54-1068905</td>
<td>501(c)(3)</td>
<td>$10,000.00</td>
<td></td>
<td></td>
<td></td>
<td>Infant Needs</td>
</tr>
<tr>
<td>(3)</td>
<td>Shen. City, Free Clinic, VA</td>
<td>54-2012308</td>
<td>501(c)(3)</td>
<td>$51,200.00</td>
<td></td>
<td></td>
<td></td>
<td>Clinic Building Campaign</td>
</tr>
<tr>
<td>(4)</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(5)</td>
<td>...</td>
<td>...</td>
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<td>...</td>
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<tr>
<td>(6)</td>
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<tr>
<td>(7)</td>
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<td>(8)</td>
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<td>(9)</td>
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<tr>
<td>(10)</td>
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</tr>
<tr>
<td>(11)</td>
<td>...</td>
<td>...</td>
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<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>(12)</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

2. Enter total number of section 501(c)(3) and government organizations listed in the line 1 table: 3

3. Enter total number of other organizations listed in the line 1 table: 0

---

For Paperwork Reduction Act Notice, see the Instructions for Form 990.
### Part III  Grants and Other Assistance to Individuals in the United States

Complete if the organization answered “Yes” to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

<table>
<thead>
<tr>
<th>(a) Type of grant or assistance</th>
<th>(b) Number of recipients</th>
<th>(c) Amount of cash grant</th>
<th>(d) Amount of non-cash assistance</th>
<th>(e) Method of valuation (book, FMV, appraisal, other)</th>
<th>(f) Description of non-cash assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarship Programs for Shen Cty Students</td>
<td>54</td>
<td>$65,775</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Part IV  Supplemental Information

Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

Part I, Line 2. The Foundation monitors its grants to ensure they are used for proper purposes and are not otherwise diverted from their intended use. (1) Grants made by the Foundation are paid by check in the name of the grantee. (2) In the case of a grant that is made for a specific purpose, a grantee organization agrees to inform the Foundation after the grant has been expended for that purpose. (3) In the case of a grant that is made for a specific purpose, a grantee organization also agrees to obtain the Foundation’s approval before the grant is expended for another purpose. (4) Through their community involvement and contact with the grantees, the directors and staff of the Foundation, and the donors to the Foundation’s restricted Funds, often have direct or indirect knowledge regarding the expenditure of grants. 

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Schedule I (Form 990) (2013)
General Instructions

Future developments. For the latest information about developments related to Schedule I (Form 990), such as legislation enacted after the schedule and its instructions were published, go to www.irs.gov/form990.

Notes. Terms in bold are defined in the Glossary of the Instructions for Form 990.

Purpose of Schedule I

Schedule I (Form 990) is used by an organization that files Form 990 to provide information on grants and other assistance made by the filing organization during the tax year to domestic organizations, domestic governments and domestic individuals.

Grants and other assistance include awards, prizes, contributions, non-cash assistance, cash allocations, stipends, scholarships, fellowships, research grants, and similar payments and distributions made by the organization during the tax year. For purposes of Schedule I, grants and other assistance do not include:

- Salaries or other compensation to employees, or payments to independent contractors if the primary purpose of such payments is to serve the direct and immediate needs of the organization (such as legal, accounting, or fundraising services).
- The payment of any benefit by a 501(c)(9) voluntary employees' beneficiary association (VEBA) to employees of a sponsoring organization or contributing employer, if such payment is made under the terms of the VEBA trust and in compliance with section 505.
- Grants to affiliates that are not organized as legal entities separate from the filing organization, or payments made to branch offices, accounts, or employees of the organization located in the United States.

A domestic organization includes a corporation or partnership created or organized in the United States or under the law of the United States or of any state or possession. A trust is a domestic organization if a court within the United States or a U.S. possession is able to exercise primary supervision over the administration of the trust; and one or more U.S. persons (or persons in U.S. possessions) have the authority to control all substantial decisions of the trust.

A domestic government is a state, a U.S. possession, a political subdivision of a state or U.S. possession, the United States, or the District of Columbia. A grant to a U.S. government agency must be included on this schedule regardless of where the agency is located or operated.

A domestic individual is a person, including a foreign citizen, who lives or resides in the United States (or a U.S. possession) and not outside of the United States (or a U.S. possession).

Parts II and III of this schedule may be duplicated to list additional grantees (Part II) or types of grants/assistance (Part III) that do not fit on the first page of these parts. Number each page of each part.

Do not report on this schedule foreign grants or assistance, including grants or assistance provided to domestic organizations, domestic governments, or domestic individuals for the purpose of providing grants or other assistance to a designated foreign organization, foreign government, or foreign individual. Instead, report them on Schedule F (Form 990), Statement of Activities Outside the United States.

Who Must File

An organization that answered “Yes” to Form 990, Part IV, Checklist of Required Schedules, line 21 or 22, must complete Part I and either Part II or Part III of this schedule and attach it to Form 990.

If an organization is not required to file Form 990 but chooses to do so, it must file a complete return and provide all of the information requested, including the required schedules.

Specific Instructions

Part I. General Information on Grants and Assistance

Complete this part if the organization answered “Yes” on Form 990, Part IV, line 21 or 22.

Lines 1 and 2. On line 1, indicate “Yes” or “No” regarding whether the organization maintains records to substantiate amounts, eligibility, and selection criteria used for grants. In general terms, describe how the organization monitors its grants to ensure that such grants are used for proper purposes and are not otherwise diverted from the intended use. For example, the organization can describe the periodic reports required or field investigations conducted. Use Part IV for the organization’s narrative response to line 2.

Part II. Grants and Other Assistance to Governments and Organizations in the United States

Line 1. Complete line 1 if the organization answered “Yes” on Form 990, Part IV, line 21. A “Yes” response means that the organization reported more than $5,000 on Form 990, Part IX, line 1, column (A). Enter information only for each recipient domestic organization or domestic government that received more than $5,000 aggregate of grants or assistance from the organization during the tax year.

Enter the details of each organization or entity on a separate line of Part II. If there are more organizations or entities to report in Part II than space available, report the additional organizations or entities on duplicate copies of Part II. Use as many duplicate copies as needed, and number each page. Use Part IV if additional space is needed for descriptions of particular column entries.

Column (a). Enter the full legal name and mailing address of each recipient organization or government entity.

Column (b). Enter the employer identification number (EIN) of the grant recipient.

Column (c). Enter the section of the Internal Revenue Code under which the organization receiving the assistance is tax-exempt, if applicable (for example, a school described in section 501(c)(3) or a social club described in section 501(c)(7)). If a recipient is a government entity, enter the name of the government entity. If a recipient is neither a tax-exempt nor a government entity, leave column (c) blank.

Column (d). Enter the total dollar amount of cash grants to each recipient organization or entity for the tax year. Cash grants include grants and allocations paid by cash, check, money order, electronic fund or wire transfer, and other charges against funds on deposit at a financial institution.

Columns (e) and (f). Enter the fair market value of noncash property. Describe the method of valuation. Report property with a readily determinable market value (for example, market quotations for securities) at its fair market value. For marketable securities registered and listed on a recognized securities exchange, measure market value on the date the property is distributed to the grantee by the average of the highest and lowest quoted selling prices or the average between the buyer’s bid and asked prices. When fair market value cannot be readily determined, use an appraised or estimated value.

Column (g). For noncash property or assistance, enter a description of the property or assistance. List all that apply. Examples of noncash assistance include medical supplies or equipment, pharmaceuticals, blankets, and books or other educational supplies.

Column (h). Describe the purpose or ultimate use of the grant funds or other assistance. Do not use general terms such as charitable, educational, religious, or scientific. Use more specific descriptions such as general support, payments for nursing services, or laboratory construction. Enter the type of assistance, such as medical, dental, or free care for indigent hospital patients. In the case of disaster assistance, include a description of the disaster and the assistance provided (for example, “Food, shelter, and clothing for Organization A’s assistance to victims of Colorado wildfires”). Use Part IV if additional space is needed for descriptions.

If the organization checks “Accrual” on Form 990, Part XII, line 1, follows SFAS 116 (ASC 958) (see Instructions for Form 990, Part IX), and makes a grant during the tax year to be paid in future years to a domestic organization or domestic government, it should report the grant’s present value in Part II, line 1, column (a) or (b), and report any accruals of present value increases in future years.
Enter the details of each type of assistance to individuals on a separate line of Part III. If there are more types of assistance than space available, report the types of assistance on duplicate copies of Part III. Use as many duplicate copies as needed, and number each page. Use Part IV if additional space is needed for descriptions of particular column entries.

**Column (a):** Specify type(s) of assistance provided, or describe the purpose or use of grant funds. Do not use general terms such as charitable, educational, religious, or scientific. Use more specific descriptions, such as scholarships for students attending a particular school, provision of books or other educational supplies, food, clothing, and shelter for indigents, or direct cash assistance to indigents; etc. In the case of specific disaster assistance, include a description of the type of assistance provided and identify the disaster (for example, "Food, shelter, and clothing for immediate relief for victims of Colorado wildfires").

**Column (b):** Enter the number of recipients for each type of assistance. If the organization is unable to determine the actual number, provide an estimate of the number. Explain in Part IV how the organization arrived at the estimate.

**Column (c):** Enter the aggregate dollar amount of cash grants for each type of grant or assistance. Cash grants include grants and allocations paid by cash, check, money order, electronic fund or wire transfer, and other charges against funds on deposit at a financial institution.

**Columns (d) and (e):** Enter the **fair market value** of noncash property. Describe the method of valuation. Report property with a readily determinable market value (for example, market quotations for securities) at its fair market value. For marketable securities registered and listed on a recognized securities exchange, measure market value by the average of the highest and lowest quoted selling prices or the average between the bona fide bid and asked prices, on the date the property is distributed to the grantee. When fair market value cannot be readily determined, use an appraised or estimated value.

**Column (f):** For noncash grants or assistance, enter descriptions of property. List all that apply. Examples of noncash assistance include medical supplies or equipment, pharmaceuticals, blankets, and books or other educational supplies.

**TIP:**

"Accrual" on Form 990, Part IV, line 1, follows SFAS 116 (ASC 958) (see instructions for Form 990, Part IX), and makes a grant during the tax year to be paid in future years to a **domestic individual**, it should report the grant's present value in Part III, column (c) or (d), and report any accruals of present value increments in future years.

**Part IV. Supplemental Information**

Use Part IV to provide narrative information required in Part I, line 2 regarding monitoring of funds, and in Part III, column (b) regarding how the organization estimated the number of recipients for each type of grant or assistance. Also use Part IV to provide other narrative explanations and descriptions, as needed. Identify the specific part and line(s) that the response supports. Part IV can be duplicated if more space is needed.
<table>
<thead>
<tr>
<th>Part I</th>
<th>Types of Property</th>
<th>(a) Check if applicable</th>
<th>(b) Number of contributions or items contributed</th>
<th>(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g</th>
<th>(d) Method of determining noncash contribution amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Art—Works of art</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Art—Historical treasures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Art—Fractional interests</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Books and publications</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Clothing and household goods</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Cars and other vehicles</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Boats and planes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Intellectual property</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Securities—Publicly traded</td>
<td></td>
<td>✓ 3</td>
<td>$68,471.11 market quotations</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Securities—Closely held stock</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Securities—Partnership, LLC, or trust interests</td>
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<td></td>
</tr>
<tr>
<td>12</td>
<td>Securities—Miscellaneous</td>
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</tr>
<tr>
<td>13</td>
<td>Qualified conservation contribution—Historic structures</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Qualified conservation contribution—Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Real estate—Residential</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Real estate—Commercial</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Real estate—Other</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Collectibles</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>19</td>
<td>Food inventory</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Drugs and medical supplies</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Taxidermy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Historical artifacts</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Scientific specimens</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>24</td>
<td>Archaeological artifacts</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Other ▶ (            )</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Other ▶ (            )</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>Other ▶ (            )</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Other ▶ (            )</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement</td>
<td>29</td>
<td>0</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 - 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period? Yes | No

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If "Yes," describe in Part II.

33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.
Part II  Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.
General Instructions
Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Schedule M (Form 990), such as legislation enacted after the schedule and its instructions were published, go to www.irs.gov/form990.

Note. Terms in bold are defined in the Glossary of the Instructions for Form 990.

Purpose of Schedule
Schedule M (Form 990) is used by an organization that files Form 990 to report the types of noncash contributions received during the year by the organization and certain information regarding such contributions. The schedule requires reporting of the quantity and the reported financial statement amount of noncash contributions received by type of property. Report noncash donated items even if sold immediately after received. Do not report noncash contributions received by the organization in a prior year. Do not report donations of services or the donated use of facilities, equipment, or materials donated.

Who Must File
An organization that answered “Yes” to Form 990, Part IV, lines 29 or 32, must complete Schedule M (Form 990) and attach it to Form 990. This means an organization that reported more than $25,000 of aggregate noncash contributions on Form 990, Part VIII, Line 1g, or that during the year received contributions of art, historical treasures, or other similar assets, or qualified conservation contributions, regardless of whether it reported any revenues for such contributions in Part VIII.

If an organization is not required to file Form 990 but chooses to do so, it must file a complete return and provide all of the information requested, including the required schedules.

Specific Instructions
Part I. Types of Property
Column (a). Check the box if during the year the organization received any contributions of the property type identified.

Column (b). For each type of property received during the year, enter the number of contributions or the number of items contributed, determined in accordance with the organization’s recordkeeping practices. Explain in Part II of this schedule whether the organization is reporting the number of contributions or the number of items received, or a combination of both methods. As described below, for contributions of securities, such as publicly traded stock, treat each separate gift (rather than each share received) as an item for this purpose.

Organizations that receive contributions of books, publications, clothing, and household goods are not required to complete column (b) for those items reported on lines 4 and 5.

Columns (c)–(d). In column (c), enter the revenues reported on Form 990, Part VIII, line 1g, for the appropriate property type. If none were reported, enter “0.”

In column (d), describe the method used to determine the amount reported on Form 990, Part VIII, line 1g (for example, cost or selling price of the donated property, sale of comparable properties, replacement cost, opinions of experts, etc.). See Pub. 561, Determining the Value of Donated Property, for more information.

Example 1. A used car in poor condition is donated to a local high school for use by students studying car repair. A used car guide shows the dealer retail value for this type of car in poor condition is $1,600. However, the guide shows the price for a private party sale of the car is only $750. The fair market value of the car is considered to be $750, which is the amount the organization reported on Form 990, Part VIII, line 1g. In column (c), the organization should enter $750. In column (d), the organization should enter “sale of comparable properties and/or opinion of expert” as the method used to determine fair market value.

Example 2. An organization primarily receives bulk donations of clothing, household goods, and other similar items, intended for resale. Under its permitted financial reporting practices, it does not recognize or record revenue at the time of receipt of the contribution, but instead records such items in inventory and reports contribution revenue at the time of sale based on prior inventory turnover experience. In column (c), the organization can enter the amount that represents the total estimated amount of annual sales revenue for each type of property received under its permitted financial reporting method, and in column (d), enter “resale value or annual sales revenue” as the method of determining revenue.

Museums and other organizations that do not report contributions of art, historical treasures, and other similar items as revenue, as permitted under generally accepted accounting principles, enter “0” in column (c) and leave column (d) blank. The organization can explain in Part II that a zero amount was reported on Form 990, Part VIII, line 1g, because the museum did not capitalize its collections, as allowed under SFAS 116 (ASC 958-360-25).

An organization that received qualified conservation contributions or conservation easements must report column (c) revenue consistent with how it reports revenue from such contributions in its books, records, and financial statements. The organization must also report revenue from such qualified conservation contributions and conservation easements consistently with how it reports such revenue in Form 990, Part VIII.

Line 1. Works of art include paintings, sculptures, prints, drawings, ceramics, antiques, decorative arts, textiles, carpets, silver, photography, film, video, installation and multimedia arts, rare books and manuscripts, historical memorabilia, and other similar objects. Works of art do not include collectibles reported on line 18 or taxidermy reported on line 21.

Line 2. An historical treasure is a building, structure, area, or property with recognized cultural, aesthetic, or historical value that is significant in the history, architecture, archeology, or culture of a country, state, or city.

Line 3. A contribution of a fractional interest in art is a contribution, not in trust, of an undivided portion of a donor’s entire interest in a work of art. A contribution of the donor’s entire interest must consist of a part of each substantial interest or right the donor owns in such work of art and must extend over the entire term of the donor’s interest in the property. A gift generally is treated as a gift of an undivided portion of a donor’s entire interest in property if the donee is given the right, as a tenant in common with the donor, to possession, dominion, and control of the property for a portion of each year appropriate to its interest in such property. For each work of art or item, report in column (b) the fractional interest for each year an interest in the property is received for the underlying work of art or item. See section 170(d) for special rules for fractional gifts.

Line 4. Enter information about contributions of all books and publications. Do not include rare books and manuscripts reported on line 1, collectibles reported on line 18, and archival records reported on lines 25 through 28.
Lines 5–14. A qualified conservation contribution is a contribution of qualified real property interest to a qualified organization exclusively for conservation purposes. A qualified real property interest means any of the following interests in real property:

1. The entire interest of the donor,
2. A remainder interest, or
3. A restriction (an easement), granted in perpetuity, on the use which may be made of the real property.

A qualified organization means an organization which is:

1. A governmental unit described in section 170(c)(1);
2. A publicly supported charitable organization described in sections 501(c)(3) and 170(b)(1)(A)(vi) or section 509(a)(2) (see the instructions for Parts II and III of Schedule A (Form 990 or 990-EZ)); or
3. A supporting organization described in sections 501(c)(3) and 509(a)(3) that is controlled by a governmental unit or a publicly supported charitable organization.

In addition, a qualified organization must have a commitment to protect the conservation purposes of a qualified conservation contribution, and have the resources to enforce those restrictions.

A conservation purpose means:

1. The preservation of land areas for outdoor recreation used by, or for the education of, the general public;
2. The protection of a relatively natural habitat of fish, wildlife, plants, or similar ecosystems;
3. The preservation of open space (including farmland and forest land) where such preservation is for the scenic enjoyment of the general public or pursuant to a clearly delineated federal, state, or local governmental conservation policy; or
4. The preservation of an historically important land area or a certified historic structure.

See section 170(h) for additional information, including special rules for the conservation purpose requirement for buildings in registered historic districts.

On line 13, enter information about contributions of a qualified real property interest that is a restriction for the exterior of a certified historic structure. A certified historic structure is any building or structure listed on the National Register of Historic Places as well as any building certified as being of historic significance to a registered historic district. See section 170(h)(4)(B) for special rules that apply to contributions made after August 17, 2006.

On line 14, enter information about qualified conservation contributions other than those entered on line 13. This includes conservation easements to preserve land areas for outdoor recreation used by, or for the education of, the general public; to protect a relatively natural habitat or ecosystem; to preserve open space; or to preserve an historically important land area.

Lines 15–23. Enter information about contributions of residential real estate. Include information about contributions (not in trust) of a remainder interest in a personal residence which was not the donor’s entire interest in the property. The term personal residence includes any property used by the donor as a personal residence but is not limited to the donor’s principal residence. The term personal residence also includes stock owned by the donor as a tenant-stockholder in a cooperative housing corporation if the dwelling the donor is entitled to occupy as a tenant-stockholder is used by the donor as a personal residence. Do not enter information about contributions of the use of facilities or property, as such contributions are not reportable on Form 990, Part VIII.

Line 16. Enter information about contributions of commercial real estate, such as a commercial office building. Include information about contributions (not in trust) of a remainder interest in a farm which was not the donor’s entire interest in the property. The term farm includes land used for the production of crops, fruits, or other agricultural products, or for the maintenance of livestock. A farm includes the improvements located on the farm property.

Line 17. Enter information about real estate interests not reported on lines 15 or 16.

Lines 18–22. Enter information about contributions of collectibles. Collectibles include autographs, sports memorabilia, dolls, stamps, coins, books (other than books and publications reported on line 4), gems, and jewelry (other than costume jewelry reported on line 5), but not art reported on lines 1 through 3, or historical artifacts or scientific specimens reported on lines 22 or 23.

Line 19. Enter information about food items, including food inventory contributed by corporations and other businesses.
Line 20. Enter information about drugs, medical supplies, and similar items contributed by corporations and other businesses that manufactured or distributed such items.

Line 21. Taxidermy property means any work of art that is the reproduction or preservation of an animal, in whole or in part; is prepared, stuffed, or mounted to recreate or more characteristics of the animal; and contains a part of the body of the dead animal.

Line 22. Enter information about historical artifacts such as furniture, fixtures, textiles, and household items of an historic nature. Do not include Art reported on lines 1 through 3, or any archeological artifacts reported on line 24.

Line 23. Scientific specimens include living plant and animal specimens, natural and physical sciences specimens (such as rocks and minerals), and objects or materials that relate to, or exhibit, the methods or principles of science.

Line 24. Enter information about archeological and ethnographic artifacts, other than Art reported on lines 1 through 3, and historical artifacts reported on line 22. An archeological artifact is any object over 250 years old and is normally discovered as a result of scientific excavation, clandestine or accidental digging for exploration on land, or under water. Ethnological artifacts are objects which are the product of a tribal or nonindustrial society, and important to the cultural heritage of a people because of its distinctive characteristics, comparative rarity, or its contribution to the knowledge of the origins, development, or history of that people.

Lines 25–28. Use lines 25 through 28 to separately report other types of property not described above or reported on previous lines. These include items that did not satisfy specific charitable deduction requirements applicable to the contribution of such type of property, but which were contributed to the organization, such as clothing and household goods that were not in good used or better condition, and conservation easements that the organization knows do not constitute qualified conservation contributions.

Self-created items, such as personal papers and manuscripts, including archival records, are to be listed separately as a type. Archival records are materials of any kind created or received by any person, family, or organization in the conduct of their affairs that are preserved because of the enduring value of the information they contain or as evidence of the functions and responsibilities of their creator.

Donations of items used by the organization at a charitable auction (other than goods sold by the charity at the auction, which should be reported on lines 1 through 24, as appropriate), such as food served at the event or floral centerpieces, can be reported separately on lines 25 through 28. Noncash contributions do not include donations of services or donated use of materials, equipment, or facilities, which may be reported in the narrative section of Form 990, Part III, line 4.

Line 29. Enter the number of Forms 8283, Noncash Charitable Contributions, received by the organization during the year for contributions for which the organization completed Form 8283, Part IV.

Lines 30a–30b. Answer “Yes” to line 30a if the organization received during the year a noncash contribution reportable on lines 1 through 28 for which the organization is required, by the terms of the gift or otherwise, to hold the property for at least three years from the date of the contribution and which property is not required to be used for exempt purposes for the entire holding period. An organization that answers “Yes” to line 30a must describe the arrangement in Part II.

Line 31. Answer “Yes” if the organization has a gift acceptance policy that requires the review of any non-standard contributions. A non-standard contribution includes a contribution of an item that is not reasonably expected to be used to satisfy or further the organization's exempt purposes (aside from the need of such organization for income or funds) and for which (a) there is no ready market to which the organization can go to liquidate the contribution and convert it to cash, and (b) the value of the item is highly speculative or difficult to ascertain. For example, the contribution of a taxpayer's successor member interest of the type described in Notice 2007-72, 2007-36 I.R.B. 544, is a non-standard contribution for this purpose.

Lines 32a–32b. Answer “Yes” to line 32a if the organization hires or uses third parties or related organizations to solicit, process, or sell noncash contributions. Answer “No” if the only third party used by the organization to solicit, process, or sell noncash contributions is a broker who sells publicly traded securities received by the organization as a gift. An organization that answers “Yes” to line 32a must describe these arrangements in Part II.

Line 33. If applicable, describe in Part II why the organization did not report revenue in column (c) for a type of property for which column (a) is checked.

Part II. Supplemental Information

Use Part II to provide narrative information required in Part I, column (b), and Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also use Part II to provide other narrative explanations and descriptions, as needed. Identify the specific line number that the response supports. Part II can be duplicated if more space is needed.
Form 990, Part IV, Section A, Line 1: Pursuant to its By Laws, the Foundation has established an Executive Committee. The members of this Committee are the Foundation's President, Vice President, Treasurer, and Secretary, all of whom are Directors of the Foundation. The Committee performs the administrative function of the Foundation and implements Board directions. Among other things, the Executive Committee is authorized to function in place of the Board of Directors between meetings.

Form 990, Part VI, Section B, Line 11: An initial draft of this Form 990 was prepared by the Foundation's President. That draft was mailed to the Foundation's Executive Committee for review, and then subsequently mailed to all Directors of the Foundation for review prior to filing.

Form 990, Part VI, Section B, Line 12: The Foundation monitors and enforces compliance with its Conflict of Interest Policy as follows. Directors and officers are asked to sign conflict of interest forms, and are expected to provide updated disclosures annually or more frequently as appropriate. Moreover, the family and business connections of the Directors and officers are generally known in the Foundation's small, rural community. At present, the Foundation has a limited number of vendor relationships and its grants are generally awarded directly to non-profit organizations (or government entities) or to a diverse group of scholarship recipients. Directors are expected to recuse themselves from Board decisions that present a personal conflict of interest.

Form 990, Part VI, Section C, Line 19: In 2013 the Foundation's 2012 Form 990 was posted on the Foundation's website. In 2013, the Foundation's Articles of Incorporation, By-Laws, Conflict of Interest Policy, and 2012 Annual Financial Statements were available to the public upon request.
General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Schedule O (Form 990 or 990-EZ), such as legislation enacted after the schedule and its instructions were published, go to www.irs.gov/form990.

Purpose of Schedule

An organization should use Schedule O (Form 990 or 990-EZ), rather than separate attachments, to provide the IRS with narrative information required for responses to specific questions on Form 990 or 990-EZ, and to explain the organization's operations or responses to various questions. It allows organizations to supplement information reported on Form 990 or 990-EZ.

Do not use Schedule O to supplement responses to questions in other schedules of the Form 990 or 990-EZ. Each of the other schedules includes a separate part for supplemental information.

Who Must File

All organizations that file Form 990 and certain organizations that file Form 990-EZ must file Schedule O (Form 990 or 990-EZ). At a minimum, the schedule must be used to answer Form 990, Part VI, lines 11b and 19. If an organization is not required to file Form 990 or 990-EZ but chooses to do so, it must file a complete return and provide all of the information requested, including the required schedules.

Specific Instructions

Use as many continuation sheets of Schedule O (Form 990 or 990-EZ) as needed.

Complete the required information on the appropriate line of Form 990 or 990-EZ prior to using Schedule O (Form 990 or 990-EZ).

Identify clearly the specific part and line(s) of Form 990 or 990-EZ to which each response relates. Follow the part and line sequence of Form 990 or 990-EZ.

Late return. If the return is not filed by the due date (including any extension granted), attach a separate statement giving the reasons for not filing on time. Do not use this schedule to provide the late-filing statement.

Amended return. If the organization checked the Amended return box on Form 990, Heading, item B, or Form 990-EZ, Heading, item B, use Schedule O (Form 990 or 990-EZ) to list each part or schedule and line item of the Form 990 or 990-EZ that was amended.

Group return. If the organization answered "Yes" to Form 990, line Hia, but "No" to line H1b), use a separate attachment to list the name, address, and EIN of each affiliated organization included in the group return. Do not use this schedule. See the Instructions for Form 990, I. Group Return.

Form 990, Parts III, V, VI, VII, IX, XI, and XII. Use Schedule O (Form 990 or 990-EZ) to provide any narrative information required for the following questions in the Form 990.

1. Part III, Statement of Program Service Accomplishments.
   a. "Yes" response to line 2.
   b. "Yes" response to line 3.
   c. Other program services on line 4d.

2. Part V, Statements Regarding Other IRS Filings and Tax Compliance.
   a. "No" response to line 3b.
   b. "Yes" or "No" response to line 13a. "No" response to line 14b.
   c. Other statements on line 14b.
   d. Part VI, Governance, Management, and Disclosure.

   a. Material differences in voting rights among members of the governing body in line 1a.
   b. Delegation of governing board's authority to executive committee.
   c. "Yes" responses to lines 2 through 7b.
   d. "No" responses to lines 8a, 8b, and 10b.
   e. "Yes" response to line 9.
   f. Description of process for review of Form 990, if any, in response to line 11b.
   g. "Yes" response to line 12c.
   h. Description of process for determining compensation in response to lines 15a and 15b.

   i. If applicable, in response to line 18, an explanation as to why the organization checked the "Other" box or did not make any of Forms 1023, 1024, 990, or 990-T publicly available.
   j. Description of public disclosure of documents in response to line 19.


   a. Explain if reporting of compensation paid by a related organization is provided only for the period during which the related organization was related, not the entire calendar year ending with or within the tax year, and state the period during which the related organization was related.
   b. Description of reasonable efforts undertaken to obtain information on compensation paid by related organizations, if the organization is unable to obtain such information to report in column (E).

4. Part IX, Statement of Functional Expenses, line 11g (other fees for services), including the type and amount of each expense included in line 11g, if the amount in Part IX, line 11g, exceeds 10% of the amount in Part IX, line 25 (total functional expenses).

5. Explanation for Part IX, Statement of Functional Expenses, line 24e (all other expenses), including the type and amount of each expense included in line 24e, if the amount on line 24e exceeds 10% of the amount in Part IX, line 25 (total functional expenses).

6. Part XI, Reconciliation of Net Assets. Explain any other changes in net assets or fund balances reported on line 9.

7. Part XII, Financial Statements and Reporting.

   a. Change in accounting method or description of other accounting method used on line 1.
   b. Change in committee oversight review from prior year on line 2c.
   c. "No" response to line 3b.

Form 990-EZ, Parts I, II, III, and V. Use Schedule O (Form 990 or 990-EZ) to provide any narrative information required for the following questions:

1. Part I, Revenue, Expenses, and Changes in Net Assets or Fund Balances.
   a. Description of other revenue, in response to line 8.
   b. List of grants and similar amounts paid, in response to line 10.
   c. Description of other expenses, in response to line 16.
   d. Explanation of other changes in net assets or fund balances, in response to line 20.

2. Part II, Balance Sheets.
   a. Description of other assets, in response to line 24.
   b. Description of total liabilities, in response to line 26.

3. Description of other program services in response to Part III, Statement of Program Service Accomplishments, line 31.

4. Part V, Other Information.
   a. "Yes" response to line 33.
   b. "Yes" response to line 34.

5. Explanation of why organization did not report unrelated business gross income of $1,000 or more to the IRS on Form 990-T, in response to line 35b.

Other. Use Schedule O (Form 990 or 990-EZ) to provide narrative explanations and descriptions in response to other specific questions. The narrative provided should refer and relate to a particular line and respond on the form.

Do not include on Schedule O (Form 990 or 990-EZ) any social security numbers, because this schedule will be made available for public inspection.