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## Return of Organization Exempt From Income Tax

OMB No 1545-0047

2005

Open to Public Inspection

Department of the Treasury  
Internal Revenue ServiceUnder section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code  
(except black lung benefit trust or private foundation)

The organization may have to use a copy of this return to satisfy state reporting requirements

## A For the 2005 calendar year, or tax year beginning , 2005, and ending

## B Check if applicable

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return  
☒ Amended return  
☐ Application pending

Please use  
IRS label  
or print  
or type.  
See  
specific  
instruc-  
tions.

## C Name of organization

Pittsburgh History and Landmarks Foundation

Number and street (or P O box if mail is not delivered to street addr) Room/suite

100 West Station Square Drive

450

City, town or country

State ZIP code + 4

Pittsburgh

PA 15219

## D Employer Identification Number

25-6058560

## E Telephone number

(412) 471-5805

## F Accounting method:

- ☐ Cash ☒ Accrual  
☐ Other (specify) ▶

Section 501(c)(3) organizations and 4947(a)(1) nonexempt  
charitable trusts must attach a completed Schedule A  
(Form 990 or 990-EZ).

H and I are not applicable to section 527 organizations

H (a) Is this a group return for affiliates? ☐ Yes ☒ No

H (b) If 'Yes,' enter number of affiliates ▶

H (c) Are all affiliates included? ☐ Yes ☒ No

(If 'No,' attach a list See instructions)

H (d) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☒ No

## I Group Exemption Number ▶

M Check ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

## G Web site: ▶ N/A

## J Organization type (check only one)

☒ 501(c) 3 (insert no) ☐ 4947(a)(1) or ☐ 527

K Check here ☐ if the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS, but if the organization chooses to file a return, be sure to file a complete return. Some states require a complete return.

L Gross receipts Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 4, 473, 570.

## Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Instructions)

## 1 Contributions, gifts, grants, and similar amounts received

## a Direct public support

1a 1,358,803.

## b Indirect public support

1b 2,716,715.

## c Government contributions (grants)

1c 164,223.

## d Total (add lines 1a through 1c) (cash \$ 4,239,741. noncash \$ )

1d 4,239,741.

## 2 Program service revenue including government fees and contracts (from Part VII, line 93)

2 210,623.

## 3 Membership dues and assessments

3 11,000.

## 4 Interest on savings and temporary cash investments

4 969.

## 5 Dividends and interest from securities

5

## 6a Gross rents

## b Less rental expenses

## c Net rental income or (loss) (subtract line 6b from line 6a)

6c

## 7 Other investment income (describe ▶ )

7

## 8a Gross amount from sales of assets other than inventory

## (A) Securities

## (B) Other

8a

## b Less cost or other basis and sales expenses

8b

## c Gain or (loss) (attach schedule)

8c

## d Net gain or (loss) (combine line 8c, columns (A) and (B))

8d

9 Special events and activities (attach schedule) If any amount is from gaming, check here ☐

## a Gross revenue (not including \$ of contributions reported on line 1a)

9a

## b Less direct expenses other than fundraising expenses

9b

## c Net income or (loss) from special events (subtract line 9b from line 9a)

9c

## 10a Gross sales of inventory, less returns and allowances

10a 11,237.

## b Less cost of goods sold

10b 5,400.

## c Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)

10c 5,837.

## 11 Other revenue (from Part VII, line 103)

11

## 12 Total revenue (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)

12 4,468,170.

## 13 Program services (from line 44, column (B))

13 2,067,502.

## 14 Management and general (from line 44, column (C))

14 310,165.

## 15 Fundraising (from line 44, column (D))

15 179,003.

## 16 Payments to affiliates (attach schedule)

16

## 17 Total expenses (add lines 16 and 44, column (A))

17 2,556,670.

## 18 Excess or (deficit) for the year (subtract line 17 from line 12)

18 1,911,500.

## 19 Net assets or fund balances at beginning of year (from line 73, column (A))

19 2,435,053.

## 20 Other changes in net assets or fund balances (attach explanation)

20

## 21 Net assets or fund balances at end of year (combine lines 18, 19, and 20)

21 4,346,553.

**Part II Statement of Functional Expenses** All organizations must complete column (A). Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22 Grants and allocations (att sch) (cash \$ 84,269. non-cash \$ ) If this amount includes foreign grants, check here <input type="checkbox"/>	22	84,269.	84,269.		
23 Specific assistance to individuals (att sch)	23				
24 Benefits paid to or for members (att sch)	24				
25 Compensation of officers, directors, etc	25	467,356.	338,851.	122,780.	5,725.
26 Other salaries and wages	26	667,919.	519,401.	57,559.	90,959.
27 Pension plan contributions	27	100,470.	76,004.	15,968.	8,498.
28 Other employee benefits	28	185,649.	140,976.	29,150.	15,523.
29 Payroll taxes	29	80,508.	61,332.	12,132.	7,044.
30 Professional fundraising fees	30				
31 Accounting fees	31	8,400.	5,600.	1,800.	1,000.
32 Legal fees	32	59,159.	55,720.	2,667.	772.
33 Supplies	33	54,310.	40,390.	9,003.	4,917.
34 Telephone	34	11,676.	7,836.	1,555.	2,285.
35 Postage and shipping	35	20,880.	15,495.	4,002.	1,383.
36 Occupancy	36	191,547.	144,932.	30,425.	16,190.
37 Equipment rental and maintenance	37	11,692.	9,709.	1,368.	615.
38 Printing and publications	38	74,174.	69,985.	895.	3,294.
39 Travel	39	30,047.	28,238.	0.	1,809.
40 Conferences, conventions, and meetings	40	13,434.	10,244.	2,505.	685.
41 Interest	41	232.	0.	232.	0.
42 Depreciation, depletion, etc (attach schedule)	42	50,341.	44,392.	3,865.	2,084.
43 Other expenses not covered above (itemize)					
a See attached schedule	43a	444,607.	414,128.	14,259.	16,220.
b	43b				
c	43c				
d	43d				
e	43e				
f	43f				
g	43g				
44 Total functional expenses. Add lines 22 through 43 (Organizations completing columns (B) - (D), carry these totals to lines 13 - 15)	44	2,556,670.	2,067,502.	310,165.	179,003.

Joint Costs. Check ☐ if you are following SOP 98-2Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services? ☐ Yes ☒ No

If 'Yes,' enter (i) the aggregate amount of these joint costs \$ , (ii) the amount allocated to Program services \$ , (iii) the amount allocated to Management and general \$ , and (iv) the amount allocated to Fundraising \$

BAA

Form 990 (2005)

**Part III Statement of Program Service Accomplishments**

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

What is the organization's primary exempt purpose? ▶ <u>Preserve historic buildings and educate the public</u>	Program Service Expenses (Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, but optional for others)
<b>a</b> <u>Educating the public concerning historical</u> <u>architecturally significant properties and methods of</u> <u>preserving and restoring aging neighborhoods (See</u> <u>attached listing details)</u>  (Grants and allocations \$ <u>0.</u> ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	604,111.
<b>b</b> <u>Maintenance and preservation of historic and/or</u> <u>significant buildings, displays, artifacts and events</u> <u>(see attached listing details)</u>  (Grants and allocations \$ <u>0.</u> ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	1,454,499.
<b>c</b> <u>Developing, writing and publishing books and pamphlets</u> <u>concerning the architecture and history of buildings</u> <u>in the greater Pittsburgh area (see attached listing</u> <u>details)</u>  (Grants and allocations \$ <u>0.</u> ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	8,892.
<b>d</b> _____ _____ _____ _____ _____ (Grants and allocations \$ _____ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>e</b> Other program services (Grants and allocations \$ _____ ) If this amount includes foreign grants, check here ▶ <input type="checkbox"/>	
<b>f Total of Program Service Expenses</b> (should equal line 44, column (B), Program services) ▶	2,067,502.

BAA

Form 990 (2005)

**Part IV Balance Sheets** (See Instructions)**Note:** Where required, attached schedules and amounts within the description column should be for end-of-year amounts only

		(A) Beginning of year		(B) End of year
<b>ASSETS</b>	<b>45</b> Cash — non-interest-bearing	49,579.	<b>45</b>	1,954,993.
	<b>46</b> Savings and temporary cash investments		<b>46</b>	
	<b>47a</b> Accounts receivable	<b>47a</b> 58,573.		
	<b>b</b> Less allowance for doubtful accounts	<b>47b</b>	264,201.	<b>47c</b> 58,573.
	<b>48a</b> Pledges receivable	<b>48a</b>		
	<b>b</b> Less allowance for doubtful accounts	<b>48b</b>		<b>48c</b>
	<b>49</b> Grants receivable		<b>49</b>	
	<b>50</b> Receivables from officers, directors, trustees, and key employees (attach schedule)		<b>50</b>	
	<b>51a</b> Other notes & loans receivable (attach sch)	<b>51a</b> 1,182,090.		
	<b>b</b> Less allowance for doubtful accounts	<b>51b</b> 286,006.	751,987.	<b>51c</b> 896,084.
	<b>52</b> Inventories for sale or use		96,330.	<b>52</b> 90,930.
	<b>53</b> Prepaid expenses and deferred charges			<b>53</b>
	<b>54</b> Investments — securities (attach schedule)	<input type="checkbox"/> Cost <input type="checkbox"/> FMV		<b>54</b>
	<b>55a</b> Investments — land, buildings, & equipment basis	<b>55a</b>		
	<b>b</b> Less accumulated depreciation (attach schedule)	<b>55b</b>		<b>55c</b>
<b>56</b> Investments — other (attach schedule)			<b>56</b>	
<b>57a</b> Land, buildings, and equipment basis	<b>57a</b> 2,000,465.			
<b>b</b> Less accumulated depreciation (attach schedule)	<b>57b</b> 532,408.	1,487,422.	<b>57c</b> 1,468,057.	
<b>58</b> Other assets (describe ► <u>See attached schedule</u> )		298,900.	<b>58</b> 319,781.	
<b>59 Total assets</b> (must equal line 74) Add lines 45 through 58		2,948,419.	<b>59</b> 4,788,418.	
<b>LIABILITIES</b>	<b>60</b> Accounts payable and accrued expenses		366,834.	<b>60</b> 316,237.
	<b>61</b> Grants payable			<b>61</b>
	<b>62</b> Deferred revenue		2,419.	<b>62</b> 1,369.
	<b>63</b> Loans from officers, directors, trustees, and key employees (attach schedule)			<b>63</b>
	<b>64a</b> Tax-exempt bond liabilities (attach schedule)			<b>64a</b>
	<b>b</b> Mortgages and other notes payable (attach schedule)			<b>64b</b>
	<b>65</b> Other liabilities (describe ► <u>Annuities Payable</u> )		144,113.	<b>65</b> 124,259.
<b>66 Total liabilities.</b> Add lines 60 through 65		513,366.	<b>66</b> 441,865.	
<b>NET ASSETS OR FUND BALANCES</b>	<b>Organizations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> and complete lines 67 through 69 and lines 73 and 74.			
	<b>67</b> Unrestricted		758,717.	<b>67</b> 1,741,017.
	<b>68</b> Temporarily restricted		1,569,411.	<b>68</b> 2,498,611.
	<b>69</b> Permanently restricted		106,925.	<b>69</b> 106,925.
	<b>Organizations that do not follow SFAS 117, check here</b> <input type="checkbox"/> and complete lines 70 through 74			
	<b>70</b> Capital stock, trust principal, or current funds			<b>70</b>
	<b>71</b> Paid-in or capital surplus, or land, building, and equipment fund			<b>71</b>
	<b>72</b> Retained earnings, endowment, accumulated income, or other funds			<b>72</b>
	<b>73 Total net assets or fund balances</b> (add lines 67 through 69 or lines 70 through 72, column (A) must equal line 19, column (B) must equal line 21)		2,435,053.	<b>73</b> 4,346,553.
	<b>74 Total liabilities and net assets/fund balances.</b> Add lines 66 and 73		2,948,419.	<b>74</b> 4,788,418.

BAA

Form 990 (2005)

**Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return** (See instructions.)

<b>a</b>	Total revenue, gains, and other support per audited financial statements	<b>a</b>	10,077,853.
<b>b</b>	Amounts included on line <b>a</b> but not on Part I, line 12		
1	Net unrealized gains on investments	<b>b1</b>	
2	Donated services and use of facilities	<b>b2</b>	
3	Recoveries of prior year grants	<b>b3</b>	
4	Other (specify) <u>Income from Equity Affiliate</u>	<b>b4</b>	8,320,998.
	Add lines <b>b1</b> through <b>b4</b>	<b>b</b>	8,320,998.
<b>c</b>	Subtract line <b>b</b> from line <b>a</b>	<b>c</b>	1,756,855.
<b>d</b>	Amounts included on Part I, line 12, but not on line <b>a</b> :		
1	Investment expenses not included on Part I, line 6b	<b>d1</b>	
2	Other (specify) <u>Cost of Goods Sold (\$5,400)</u> <u>Grants from affiliates (\$2,716,715)</u>	<b>d2</b>	2,711,315.
	Add lines <b>d1</b> and <b>d2</b>	<b>d</b>	2,711,315.
<b>e</b>	<b>Total revenue</b> (Part I, line 12) Add lines <b>c</b> and <b>d</b>	<b>e</b>	4,468,170.

**Part IV-B Reconciliation of Expenses per Audited Financial Statements with Expenses per Return**

<b>a</b>	Total expenses and losses per audited financial statements	<b>a</b>	2,562,070.
<b>b</b>	Amounts included on line <b>a</b> but not on Part I, line 17		
1	Donated services and use of facilities	<b>b1</b>	
2	Prior year adjustments reported on Part I, line 20	<b>b2</b>	
3	Losses reported on Part I, line 20	<b>b3</b>	
4	Other (specify) <u>Cost of Goods Sold</u>	<b>b4</b>	5,400.
	Add lines <b>b1</b> through <b>b4</b>	<b>b</b>	5,400.
<b>c</b>	Subtract line <b>b</b> from line <b>a</b>	<b>c</b>	2,556,670.
<b>d</b>	Amounts included on Part I, line 17, but not on line <b>a</b> :		
1	Investment expenses not included on Part I, line 6b	<b>d1</b>	
2	Other (specify)	<b>d2</b>	
	Add lines <b>d1</b> and <b>d2</b>	<b>d</b>	
<b>e</b>	<b>Total expenses</b> (Part I, line 17) Add lines <b>c</b> and <b>d</b>	<b>e</b>	2,556,670.

**Part V-A Current Officers, Directors, Trustees, and Key Employees** (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated.) (See the instructions.)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (if not paid, enter -0-)	(D) Contributions to employee benefit plans and deferred compensation plans	(E) Expense account and other allowances
Arthur P. Ziegler Jr. 220 S. Home Avenue Pittsburgh, PA 15202	President 60	225,000.	17,200.	4,073.
Henry P. Hoffstot III 100 W. Station Square Dr. Ste 450 Pgh, PA 15219	CFO 40	125,000.	7,900.	0.
Louise Sturgess 161 Mayfair Drive Pittsburgh, PA 15228	Ex. Director 55	86,983.	1,200.	0.
Mark S. Bibro 31 Terminal Way Pittsburgh, PA 15219	Chairman 15	0.	0.	0.
Eric Dickerson 33 River Walk Way Pittsburgh, PA 15219	Treasurer 5	0.	0.	0.
See List of Officers, Etc. Statement				

Yes	No
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75b		X
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75c		X
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[illegible]

75d	X	
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**Benefits** (If any former officer, director, trustee, or key employee received compensation or other benefits (described below) during the year, list that person below and enter the amount of compensation or other benefits in the appropriate column. See the instructions.)

(A) Name and address	(B) Loans and Advances	(C) Compensation	(D) Contributions to employee benefit plans and deferred compensation plans	(E) Expense account and other allowances
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Yes	No
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76		X
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77		X
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78a	X
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78b		
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79		X
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80 a	X	
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1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466
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81 a

81 b		X
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**Part VI Other Information** (continued)

		Yes	No
<b>82 a</b>	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?		X
<b>82 b</b>	If 'Yes,' you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions in Part III.)		
<b>83 a</b>	Did the organization comply with the public inspection requirements for returns and exemption applications?	X	
<b>83 b</b>	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	X	
<b>84 a</b>	Did the organization solicit any contributions or gifts that were not tax deductible?		X
<b>84 b</b>	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>85 a</b>	<b>501(c)(4), (5), or (6) organizations</b> Were substantially all dues nondeductible by members?		
<b>85 b</b>	Did the organization make only in-house lobbying expenditures of \$2,000 or less?		
If 'Yes' was answered to either 85a or 85b, do not complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.			
<b>85 c</b>	Dues, assessments, and similar amounts from members		
<b>85 d</b>	Section 162(e) lobbying and political expenditures		
<b>85 e</b>	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices		
<b>85 f</b>	Taxable amount of lobbying and political expenditures (line 85d less 85e)		
<b>85 g</b>	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?		
<b>85 h</b>	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?		
<b>86 a</b>	<b>501(c)(7) organizations</b> Enter Initiation fees and capital contributions included on line 12		
<b>86 b</b>	Gross receipts, included on line 12, for public use of club facilities		
<b>87 a</b>	<b>501(c)(12) organizations</b> Enter Gross income from members or shareholders		
<b>87 b</b>	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)		
<b>88</b>	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If 'Yes,' complete Part IX.		X
<b>89 a</b>	<b>501(c)(3) organizations</b> Enter Amount of tax imposed on the organization during the year under section 4911 <u>0.</u> , section 4912 <u>0.</u> , section 4955 <u>0.</u>		
<b>89 b</b>	<b>501(c)(3) and 501(c)(4) organizations</b> Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If 'Yes,' attach a statement explaining each transaction.		X
<b>c</b> Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <u>0.</u>			
<b>d</b> Enter Amount of tax on line 89c, above, reimbursed by the organization <u>0.</u>			
<b>90 a</b>	List the states with which a copy of this return is filed <u>Pennsylvania</u>		
<b>90 b</b>	Number of employees employed in the pay period that includes March 12, 2005 (See instructions.)		21
<b>91 a</b>	The books are in care of <u>Tom Croyle-Controller</u> Telephone number <u>(412) 471-5808</u> Located at <u>Foundation Address</u> ZIP + 4 <u>15219</u>		
<b>91 b</b>	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)? If 'Yes,' enter the name of the foreign country <u>See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Statements</u>		X
<b>91 c</b>	At any time during the calendar year, did the organization maintain an office outside of the United States? If 'Yes,' enter the name of the foreign country <u></u>		X
<b>92</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041 - Check here <u></u> and enter the amount of tax-exempt interest received or accrued during the tax year <u>92</u>		

BAA

Form 990 (2005)



**Part VII Analysis of Income-Producing Activities** (See the instructions)

Note: Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue:					
a Preservation Programs					148,785.
b NAP/CSP Southside Programs					25,070.
c Educational Programs					36,768.
d					
e					
f Medicare/Medicaid payments					
g Fees & contracts from government agencies					
94 Membership dues and assessments			03	11,000.	
95 Interest on savings & temporary cash invmnts			14	969.	
96 Dividends & interest from securities					
97 Net rental income or (loss) from real estate:					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from pers prop					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					5,837.
103 Other revenue a					
b					
c					
d					
e					
104 Subtotal (add columns (B), (D), and (E))				11,969.	216,460.
105 Total (add line 104, columns (B), (D), and (E))					228,429.

Note: Line 105 plus line 1d, Part I, should equal the amount on line 12, Part I

**Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes** (See the instructions)

Line No.	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
93a	See attached statement
93b	See attached statement
93c	See attached statement

**Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities** (See the instructions)

N/A

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
	%			
	%			
	%			
	%			

**Part X Information Regarding Transfers Associated with Personal Benefit Contracts** (See the instructions)

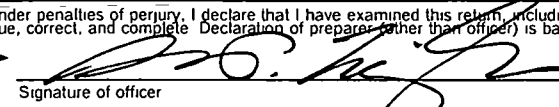
a Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes ☒ No

Note: If 'Yes' to (b), file Form 8870 and Form 4720 (see instructions)

Please Sign Here	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.	
	Signature of officer 	Date Oct 7 2011
	Arthur P. Ziegler Jr. President Type or print name and title	

Paid Preparer's Use Only	Preparer's signature David Hess, CPA	Date 10/5/11	Check if self-employed <input type="checkbox"/>	Preparer's SSN or PTIN (See General instruction W)
	Firm's name (or yours if self-employed), address, and ZIP + 4 Frank P. Hess & Co., Inc. 51 South 14th Street Pittsburgh PA 15203	EIN	Phone no	

**SCHEDULE A**  
(Form 990 or 990-EZ)Department of the Treasury  
Internal Revenue Service**Organization Exempt Under  
Section 501(c)(3)**(Except Private Foundation) and Section 501(e), 501(f), 501(k),  
501(n), or 4947(a)(1) Nonexempt Charitable Trust

Supplementary Information — (See separate instructions.)

▶ **MUST be completed by the above organizations and attached to their Form 990 or 990-EZ.**

OMB No 1545-0047

**2005**

Name of the organization

Pittsburgh History and Landmarks Foundation

Employer identification number

25-6058560

**Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees**

(See instructions List each one If there are none, enter 'None ')

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances
John C. Miller Foundation Address	Development 50	96,812.	18,000.	0.
Cathy McCollum Foundation Address	Operations 50	84,479.	6,000.	0.
Eugene Matta Foundation Address	Real Estate 50	77,812.	0.	0.
Tom Keffer Foundation Address	Construction 50	74,987.	0.	0.
Charles Croyle Foundation Address	Controller 50	58,542.	4,200.	0.
Total number of other employees paid over \$50,000 ▶	3			

**Part II— A Compensation of the Five Highest Paid Independent Contractors for Professional Services**

(See instructions List each one (whether individuals or firms) If there are none, enter 'None ')

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
Bruder Construction 1525 Buena Vista; Pgh, PA 15212	Construction	195,758.
Total number of others receiving over \$50,000 for professional services ▶	None	

**Part II — B Compensation of the Five Highest Paid Independent Contractors for Other Services**

(List each contractor who performed services other than professional services, whether individuals or firms If there are none, enter 'None ' See instructions )

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
None		
Total number of other contractors receiving over \$50,000 for other services ▶	None	

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990 and Form 990-EZ.**

Schedule A (Form 990 or 990-EZ) 2005

**Part III** Statements About Activities (See instructions)

Yes No

- 1 During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If 'Yes,' enter the total expenses paid or incurred in connection with the lobbying activities **1** \$ \_\_\_\_\_ (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B)

Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A. Other organizations checking 'Yes' must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities

- 2 During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary? (If the answer to any question is 'Yes,' attach a detailed statement explaining the transactions)

a Sale, exchange, or leasing of property?

b Lending of money or other extension of credit?

c Furnishing of goods, services, or facilities?

See Part V, Form 990

d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?

e Transfer of any part of its income or assets?

- 3a Do you make grants for scholarships, fellowships, student loans, etc? (If 'Yes,' attach an explanation of how you determine that recipients qualify to receive payments)

b Do you have a section 403(b) annuity plan for your employees?

c During the year, did the organization receive a contribution of qualified real property interest under section 170(h)?

- 4a Did you maintain any separate account for participating donors where donors have the right to provide advice on the use or distribution of funds?

b Do you provide credit counseling, debt management, credit repair, or debt negotiation services?

**Part IV** Reason for Non-Private Foundation Status (See instructions)

The organization is not a private foundation because it is (Please check only **ONE** applicable box.)

- 5 ☐ A church, convention of churches, or association of churches Section 170(b)(1)(A)(i).
- 6 ☐ A school Section 170(b)(1)(A)(ii) (Also complete Part V)
- 7 ☐ A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)
- 8 ☐ A Federal, state, or local government or governmental unit Section 170(b)(1)(A)(v)
- 9 ☐ A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii) Enter the hospital's name, city, and state **10** ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the **Support Schedule** in Part IV-A)
- 11a ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A)
- 11b ☐ A community trust. Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A)
- 12 ☐ 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 charitable, etc., 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) (Also complete the **Support Schedule** in Part IV-A)
- 13 ☐ An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in (1) lines 5 through 12 above, or (2) section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2). Check the box that describes the type of supporting organization ☐ Type 1 ☐ Type 2 ☐ Type 3

Provide the following information about the supported organizations (See instructions)

(a) Name(s) of supported organization(s)	(b) Line number from above

- 14 ☐ An organization organized and operated to test for public safety Section 509(a)(4) (See instructions)

**Part IV-A Support Schedule** (Complete only if you checked a box on line 10, 11, or 12) *Use cash method of accounting.***Note:** You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2003	(c) 2002	(d) 2001	(e) Total
<b>15</b> Gifts, grants, and contributions received (Do not include unusual grants. See line 28.)	804,690.	743,030.	900,716.	877,681.	3,326,117.
<b>16</b> Membership fees received	12,000.	13,000.	13,000.	13,000.	51,000.
<b>17</b> Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to the organization's charitable, etc., purpose	145,862.	211,321.	317,630.	117,268.	792,081.
<b>18</b> Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	18,756.	2,626.	3,329.	5,542.	30,253.
<b>19</b> Net income from unrelated business activities not included in line 18					
<b>20</b> Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
<b>21</b> The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge.					
<b>22</b> Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets.					
<b>23</b> Total of lines 15 through 22	981,308.	969,977.	1,234,675.	1,013,491.	4,199,451.
<b>24</b> Line 23 minus line 17	835,446.	758,656.	917,045.	896,223.	3,407,370.
<b>25</b> Enter 1% of line 23	9,813.	9,700.	12,347.	10,135.	

<b>26 Organizations described on lines 10 or 11:</b>	<b>a</b> Enter 2% of amount in column (e), line 24	<b>26a</b> 68,147.
<b>b</b> Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 2001 through 2004 exceeded the amount shown in line 26a. Do not file this list with your return. Enter the total of all these excess amounts.		<b>26b</b> 1,102,265.
<b>c</b> Total support for section 509(a)(1) test. Enter line 24, column (e).		<b>26c</b> 3,407,370.
<b>d</b> Add: Amounts from column (e) for lines <b>18</b> 30,253. <b>19</b> _____		<b>26d</b> 1,132,518.
<b>22</b> _____ <b>26b</b> 1,102,265.		<b>26e</b> 2,274,852.
<b>e</b> Public support (line 26c minus line 26d total)		<b>26f</b> 66.76 %
<b>f</b> Public support percentage (line 26e (numerator) divided by line 26c (denominator))		

**27 Organizations described on line 12:**

**a** For amounts included in lines 15, 16, and 17 that were received from a 'disqualified person,' prepare a list for your records to show the name of, and total amounts received in each year from, each 'disqualified person.' Do not file this list with your return. Enter the sum of such amounts for each year:

(2004) \_\_\_\_\_ (2003) \_\_\_\_\_ (2002) \_\_\_\_\_ (2001) \_\_\_\_\_

**b** For any amount included in line 17 that was received from each person (other than 'disqualified persons'), prepare a list for your records to show the name of, and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) \$5,000. (Include in the list organizations described in lines 5 through 11b, as well as individuals.) Do not file this list with your return. After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year:

(2004) \_\_\_\_\_ (2003) \_\_\_\_\_ (2002) \_\_\_\_\_ (2001) \_\_\_\_\_

<b>c</b> Add: Amounts from column (e) for lines <b>15</b> _____ <b>16</b> _____		<b>27c</b> _____
<b>17</b> _____ <b>20</b> _____ <b>21</b> _____		<b>27d</b> _____
<b>d</b> Add: Line 27a total _____ and line 27b total _____		<b>27e</b> _____
<b>e</b> Public support (line 27c total minus line 27d total)		
<b>f</b> Total support for section 509(a)(2) test. Enter amount from line 23, column (e)	<b>27f</b> _____	
<b>g</b> Public support percentage (line 27e (numerator) divided by line 27f (denominator))		<b>27g</b> %
<b>h</b> Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))		<b>27h</b> %

**28 Unusual Grants:** For an organization described in line 10, 11, or 12 that received any unusual grants during 2001 through 2004, prepare a list for your records to show, for each year, the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant. Do not file this list with your return. Do not include these grants in line 15.

**Part V****Private School Questionnaire** (See instructions)

(To be completed ONLY by schools that checked the box on line 6 in Part IV)

		N/A	
		Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?		
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?		
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If 'Yes,' please describe, if 'No,' please explain. (If you need more space, attach a separate statement )		
32	Does the organization maintain the following		
a	Records indicating the racial composition of the student body, faculty, and administrative staff?		
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?		
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?		
d	Copies of all material used by the organization or on its behalf to solicit contributions?		
	If you answered 'No' to any of the above, please explain (If you need more space, attach a separate statement )		
33	Does the organization discriminate by race in any way with respect to		
a	Students' rights or privileges?		
b	Admissions policies?		
c	Employment of faculty or administrative staff?		
d	Scholarships or other financial assistance?		
e	Educational policies?		
f	Use of facilities?		
g	Athletic programs?		
h	Other extracurricular activities?		
	If you answered 'Yes' to any of the above, please explain. (If you need more space, attach a separate statement )		
34a	Does the organization receive any financial aid or assistance from a governmental agency?		
b	Has the organization's right to such aid ever been revoked or suspended?		
	If you answered 'Yes' to either 34a or b, please explain using an attached statement		
35	Does the organization certify that it has complied with the applicable requirements of sections 4 01 through 4 05 of Rev Proc 75-50, 1975-2 C B 587, covering racial nondiscrimination? If 'No,' attach an explanation		

**Part VI-A Lobbying Expenditures by Electing Public Charities** (See instructions )  
(To be completed **ONLY** by an eligible organization that filed Form 5768)Check ☒ **a** if the organization belongs to an affiliated group Check ☐ **b** if you checked 'a' and 'limited control' provisions apply

<b>Limits on Lobbying Expenditures</b> (The term 'expenditures' means amounts paid or incurred )		<b>(a)</b> Affiliated group totals	<b>(b)</b> To be completed for ALL electing organizations
<b>36</b> Total lobbying expenditures to influence public opinion (grassroots lobbying)	<b>36</b>		
<b>37</b> Total lobbying expenditures to influence a legislative body (direct lobbying)	<b>37</b>		
<b>38</b> Total lobbying expenditures (add lines 36 and 37)	<b>38</b>		
<b>39</b> Other exempt purpose expenditures	<b>39</b>		
<b>40</b> Total exempt purpose expenditures (add lines 38 and 39)	<b>40</b>		
<b>41</b> Lobbying nontaxable amount Enter the amount from the following table –			
<b>If the amount on line 40 is –</b>	<b>The lobbying nontaxable amount is –</b>		
Not over \$500,000	20% of the amount on line 40		
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000		
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000		
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000		
Over \$17,000,000	\$1,000,000		
<b>42</b> Grassroots nontaxable amount (enter 25% of line 41)	<b>42</b>		
<b>43</b> Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36	<b>43</b>		
<b>44</b> Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38	<b>44</b>		
<b>Caution:</b> If there is an amount on either line 43 or line 44, you must file Form 4720			

**4-Year Averaging Period Under Section 501(h)**(Some organizations that made a section 501(h) election do not have to complete all of the five columns below  
See the instructions for lines 45 through 50 )

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2004	(c) 2003	(d) 2002	(e) Total
<b>45</b> Lobbying nontaxable amount					
<b>46</b> Lobbying ceiling amount (150% of line 45(e))					
<b>47</b> Total lobbying expenditures					
<b>48</b> Grassroots non-taxable amount					
<b>49</b> Grassroots ceiling amount (150% of line 48(e))					
<b>50</b> Grassroots lobbying expenditures					

**Part VI-B Lobbying Activity by Nonelecting Public Charities**

(For reporting only by organizations that did not complete Part VI-A) (See instructions )

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of

- a** Volunteers
- b** Paid staff or management (Include compensation in expenses reported on lines c through h.)
- c** Media advertisements
- d** Mailings to members, legislators, or the public
- e** Publications, or published or broadcast statements
- f** Grants to other organizations for lobbying purposes
- g** Direct contact with legislators, their staffs, government officials, or a legislative body
- h** Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means
- i** Total lobbying expenditures (add lines c through h.)

Yes	No	Amount
	X	
	X	
	X	
	X	
	X	
	X	
	X	
	X	

If 'Yes' to any of the above, also attach a statement giving a detailed description of the lobbying activities



Form 990, Page 5, Part V-A

**List of Officers, Etc. Statement**

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (if not paid, enter -0-)	(D) Contributions to employee benefit plans and deferred compensation	(E) Expense account and other allowances
Mary McDonough 217 Tennyson Avenue Pittsburgh, PA 15213	Secretary 0	0.	0.	0.
Martha Jordan 600 Locust Avenue Pittsburgh, PA 15282	Vice Chairman 0	0.	0.	0.
George Dorman 1619 Tiffany Ridge Rd Pittsburgh, PA 15241	Vice Chairman 0	0.	0.	0.
Howard Slaughter 625 Liberty Ave; ste 910 Pittsburgh, PA 15222	Vice Chairman 0	0.	0.	0.
See additional listing attached-no compensation benefits or expense accounts	Board of Directors 0	0.	0.	0.



Pittsburgh History and Landmarks Foundation  
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Page One

Form 990, Part II, Line 22 - Grants and Allocations

	<u>Amount</u>	<u>Purpose</u>
Religious Properties Historic Restoration Program	\$53,945	Historic Religious Properties
National Trust	9,000	Preservation Serv.
Northside Leadership	2,200	Preservation Serv.
Preservation Pennsylvania	2,025	Preservation Serv.
West Pittsburgh Partnership	1,500	Preservation Serv.
East Liberty Development Inc.	1,500	Preservation Serv.
Mattress Factory	1,500	Preservation Serv.
Preservation Action	1,450	Preservation Serv.
Phipps Conservatory	1,030	Preservation Serv.
Pittsburgh Parks Conservancy	1,000	Preservation Serv.
Miscellaneous Other	<u>9,119</u>	Preservation Serv.
	<u>\$ 84,269</u>	

Form 990, Part II, Line 43 - Other Expenses

<u>Expense</u>	<u>[A] Total</u>	<u>[B] Program Services</u>	<u>[C] Management &amp; General</u>	<u>[D] Fundraising</u>
Program and Tours	\$275,775	\$269,309	\$ -	\$ 6,466
Professional Fees	59,243	57,860	1,383	-
Insurance	44,303	33,176	9,585	1,542
Advertising	18,245	16,295	-	1,950
Fees	11,615	6,931	1,619	3,065
Transportation	7,782	7,057	378	347
Utilities	5,710	5,710	-	-
Memberships	5,640	4,205	278	1,157
Photography	4,822	4,822	-	-
Plaques	2,244	2,244	-	-
Subscriptions	6,530	4,011	826	1,693
Taxes	2,031	1,841	190	-
Security	489	489	-	-
Signage	178	178	-	-
	<u>\$444,607</u>	<u>\$414,128</u>	<u>\$14,259</u>	<u>\$16,220</u>

Pittsburgh History and Landmarks Foundation  
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Page Two

Form 990, Part IV, Line 51a Loans Receivable

	<u>Amount</u>
1505 East Carson	\$ 250,000
Townhouses on 5408-5420	197,536
North Side Civic Council	190,006
The Union Project	170,000
Aliquippa Place Assoc.	96,000
Deliverance Development	92,000
Black Vietnam Era Veterans	51,505
Methodist Union of Social Agencies	49,000
Mattress Factory	37,000
Michael George Corp.	8,280
Burtner House Restoration	7,000
Bulgarian Macedonian Center	6,901
Allegheny County	15,000
Sara Wyckoff	<u>11,862</u>
	<u>\$1,182,090</u>

Form 990, Part IV, Line 57c - Fixed Assets

	<u>Cost</u>	<u>Accumulated Depreciation</u>	<u>Net Book Value</u>
Building & Restoration	\$ 689,003	\$199,337	\$ 489,666
Artifacts	940,270	97,556	842,714
Land	32,450	-	32,450
Office Equipment	180,760	139,950	40,810
Railroad & Trolley Cars	110,420	63,433	46,987
Furniture & Fixtures	<u>47,562</u>	<u>32,132</u>	<u>15,430</u>
	<u>\$2,000,465</u>	<u>\$532,408</u>	<u>\$1,468,057</u>

Form 990, Part IV, Line 58 - Other Assets

Assets Held In Trust	\$258,808
Prepaid Expenses	<u>60,973</u>
	<u>\$319,781</u>

Form 990, Part IIIa

EDUCATION

\$479,224 1. Education Programs

Amounts are expended to develop and deliver public education programs. These include courses in local history, architecture and urban planning; tours and exhibitions of local historical sites for public and private school classes in the Allegheny County area; seminars on Pittsburgh history for school children; and the research and preparation of booklets and brochures on local history and architecture. Treasury Regulation Section 1.501(c)(3)-1(d)(3) provides that the instruction of the public on subjects useful to the individual and beneficial to the community promotes educational purposes within the meaning of IRC Section 501(c)(3). Since the Educational Fund carries on such activities, it is operating for educational purposes within the meaning of the regulations.

124,887 2. Programs and Tours

Amounts are expended to conduct two types of activities. First, funds are disbursed to pay for lecturers who present programs on local history, architecture and preservation methods. Second, the fund subsidizes tour programs to historic buildings and neighborhoods that are conducted to educate members of the public on the interrelationship between architectural styles and living styles years ago. Treasury Regulation Section 1.501(c)(3)-1(d)(3)(ii) provides that educational purposes may be promoted through the presentation of forums, lectures and similar programs. It also indicated that making museum exhibits available for public view is educational. The Programs and Tours Fund conducts both such activities--offering lectures and offering members of the public the opportunity to visit historic buildings which are "museums" of a particular period of history.

\$604,111 Total

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Form 990, Part IIIb

PRESERVATION

\$1,409,466 1. Preservation Programs

Amounts are expended to support the preservation activities of nonprofit neighborhood organizations. Grants are made to provide technical support to organizations undertaking projects to preserve and beautify their communities. Loans are also provided to organizations that are attempting to restore housing in deteriorating inner-city neighborhoods for the benefit of low and moderate income families. Treasury Regulation 1.501(c)(3)-1(d)(2) provides that the term, "charitable," includes the promotion of social welfare by organizations designed to combat community deterioration. Revenue Ruling 68-14, 1968-1 CB 243, provides that an organization formed to promote and assist in city beautification projects is operating for charitable purposes within the meaning of IRC Section 501(c)(3). Revenue Ruling 86-49 provides that an organization formed to acquire and occasionally restore historically or architecturally significant properties and to subsequently dispose of these properties subject to restrictive covenants to preserve the historical or architectural value of such properties is operating for educational purposes within the meaning of IRC Section 501(c)(3).

By providing grants or loans to nonprofit organizations whose purpose is to combat community deterioration or preserve the educational value of historical homes in the manner described in Revenue Rulings 68-14, 70-585 and 86-49, Pittsburgh History and Landmarks Foundation is, itself, operating for educational and charitable purposes within the meaning of IRC Section 501(c)(3).

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Form 990, Part IIIb (continued)

20,679 2. Artifacts

Amounts are expended to acquire and restore historically significant railroad and trolley equipment, and is then put on public display. Revenue Ruling 75-470, 1975-2 CB 207, states that an organization that promotes appreciation of history by acquiring and restoring buildings having special historical significance for public display is an educational purpose within the meaning of IRC Section 501(c)(3). Similarly, the acquisition of historically significant personal property that is restored and put on public display is an educational purpose under IRC Section 501(c)(3).

24,354 3. Neville House

Amounts are expended for the restoration and maintenance of an 18th-century house open to the public for viewing. Revenue Ruling 75-470, 1975-2 CB 207, states that an organization formed to promote an appreciation of history through the acquisition, restoration and preservation of buildings having special historic significance and which are open for viewing by the general public is an educational activity within the meaning of IRC Section 501(c)(3).

\$1,454,499 Total

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Form 990, Part IIIC

BOOKS

\$ 461 1. Clyde Hare Book

Amounts are expended in support of the research, writing and publication of a photographic album documenting Pittsburgh from the 1950's to the present. It reveals the dramatic physical changes of Pittsburgh's rebuilding during Renaissance I, the heroics of steel making and the variety of life and natural beauty of Pittsburgh. Revenue Rulings 64-195, 67-1 and 67-148.

8,431 2. A.W. Schmidt Book

Amounts are expended in support of the research, writing and publication of a book on the historical and architecturally significant buildings within the region.

\$ 8,892 Total

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Form 990, Part VI, Line 80b - Related Entities

<u>Organization</u>	<u>Relationship</u>	<u>Exempt/ Nonexempt</u>
Landmarks Financial Corporation	Subsidiary	Exempt
Landmarks Development Corporation	Subsidiary(1)	Nonexempt

(1) 100% - Owned subsidiary of Landmarks Financial Corporation.

Form 990, Part VIII

<u>Line Number</u>	<u>Explanation</u>
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93a

PHLF creates programs to identify and help preserve the architectural landmarks, historic neighborhoods, and historic designed landscapes of Allegheny County. It makes low interest preservation loans to other 501 (c) (3) nonprofit organization based in Allegheny County for use in preserving buildings and neighborhoods of historical and architectural value. PHLF also provides programs and technical assistants to these low and moderate income people in methods of preserving their neighborhoods.

93b

PHLF is currently developing programs in order to help in the revitalization of a local historic community. The programs include education, job training, publications and landscaping improvements.

93c

Pittsburgh History and Landmarks Foundation sponsors lectures on local sites and properties with historical or architectural significance. It also sponsors tours to give members of the public the opportunity to visit historic buildings and neighborhoods with a guide who can discuss with them the significance of the sites. Treasury Regulations Section 1.501(c)(3)-1(d)(3) provides that the instruction of the public on subjects useful to the individual and beneficial to the community promotes educational purposes within the meaning of IRC Section 501(c)(3). Such educational purposes can be promoted through the presentation of forums, lectures and similar programs. The regulations also state that making museum exhibits open for public display is educational. PHLF's activities in providing lectures and tours of historically and architecturally significant properties and the preservation of such properties promotes its tax-exempt educational purposes. Income received from the conduct of such activities is, therefore, not subject to the Unrelated Business Income Tax.

Form 990, Part VIII (continued)

102 PHLF finances the research, writing and publication of books on issues of historic preservation in the western Pennsylvania area. These books are written for their historic value rather than popular appeal and are not sold in a commercial manner. Revenue Ruling 67-4, 1967-1 CB 326, states that an organization engaged in publishing will be operating for exempt purposes within the meaning of IRC Section 501(c)(3) if (1) the content of the publication is educational, (2) preparation of the material follows methods generally accepted as educational in character, (3) the distribution of the materials is necessary or valuable in achieving the organization's educational purposes, and (4) the manner in which the distribution is accomplished is distinguishable from ordinary commercial publishing practices. Information on historic preservation is clearly educational. Distribution of the books written and published under PHLF sponsorship is necessary to educate the public on historic preservation issues; and, because the sale of such books is not conducted in a commercial manner, income received is not subject to the UBI Tax.

Form 990, Schedule A, Part III, Line 3a Statements About Activities

The prerequisites necessary to apply for a scholarship award are as follows:

1. The applicant must be a resident of Allegheny County.
2. The applicant's cumulative Quality Point Average at end of the first semester senior year must be 3.25 or greater.
3. The award is based on a student's academic achievement, community service/work experience, financial need, and interest in the history, architecture, and/or landscape design in the Pittsburgh region.
4. The applicant must write an essay, provide a high school transcript, a copy of his/her college acceptance letter, and one letter of recommendation.
5. We want the applicant to be pursuing a degree in some form of architectural preservation of historic preservation that meets our charitable purposes.



# 2005 Pittsburgh History & Landmarks Foundation Board Members

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