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THE HERBERT JONES FOUNDATION

Form 990-PF (2008)

C/O KEYBANK NATIONAL ASSOCIATION, TTEE

94-3124801

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Part II	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments		827,734.	648,031.	648,031.
	3 Accounts receivable ►				
	Less allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U S and state government obligations	STMT 8	1,489,146.	1,739,146.	1,817,891.
	b Investments - corporate stock	STMT 9	3,616,598.	3,470,606.	4,227,934.
	c Investments - corporate bonds	STMT 10	1,206,138.	905,879.	947,015.
	11 Investments - land, buildings, and equipment basis ►				
	Less: accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other	STMT 11	2,821,494.	2,742,314.	2,590,960.
	14 Land, buildings, and equipment basis ►				
	Less: accumulated depreciation ►				
	15 Other assets (describe ►)	STATEMENT 12)	0.	136,682.	136,682.
	16 Total assets (to be completed by all filers)		9,961,110.	9,642,658.	10,368,513.
	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ►)				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds		9,961,110.	9,642,658.	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30 Total net assets or fund balances		9,961,110.	9,642,658.	
	31 Total liabilities and net assets/fund balances		9,961,110.	9,642,658.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	9,961,110.
2 Enter amount from Part I, line 27a	2	-318,452.
3 Other increases not included in line 2 (itemize) ►	3	0.
4 Add lines 1, 2, and 3	4	9,642,658.
5 Decreases not included in line 2 (itemize) ►	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,642,658.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a SHORT-TERM CAPITAL LOSS - SEE ATTACHED DETAIL	P	VARIOUS	VARIOUS
b LONG-TERM CAPITAL GAIN - SEE ATTACHED DETAIL	P	VARIOUS	VARIOUS
c OTHER NON-CASH ADJUSTMENTS	P	VARIOUS	VARIOUS
d MISCELLANEOUS BASIS ADJUSTMENTS	P	VARIOUS	VARIOUS
e			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 54,827.		61,770.	-6,943.
b 2,095,866.		2,126,397.	-30,531.
c		2,475.	-2,475.
d		964.	-964.
e			
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-6,943.
b			-30,531.
c			-2,475.
d			-964.
e			
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-40,913.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

Yes No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col. (c))
2007	589,688.	12,192,245.	.048366
2006	612,364.	12,142,212.	.050433
2005	559,102.	11,521,419.	.048527
2004	535,155.	11,089,480.	.048258
2003	519,220.	10,960,606.	.047371

2 Total of line 1, column (d)

2 .242955

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

3 .048591

4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5

4 9,565,317.

5 Multiply line 4 by line 3

5 464,788.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 2,784.

7 Add lines 5 and 6

7 467,572.

8 Enter qualifying distributions from Part XII, line 4

8 548,842.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate
See the Part VI Instructions

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Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)1a Exempt operating foundations described in section 4940(d)(2), check here ► and enter "N/A" on line 1

Date of ruling letter _____ (attach copy of ruling letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► and enter 1% of Part I, line 27b

c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-

6 Credits/Payments

a 2008 estimated tax payments and 2007 overpayment credited to 2008

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

6a	9,160.
6b	
6c	
6d	

7 Total credits and payments Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be Credited to 2009 estimated tax ►

6,376. Refunded ►

11 0.

7 9,160.

8

9

10 6,376.

11

0.

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a	X
1b	X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?

1b	
1c	X

If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

1c	X
2	X

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2	X
3	X

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If "Yes," attach a detailed description of the activities.

3	X
4a	X

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

4a	X
4b	

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4b	
5	X

5	X
6	X

b If "Yes," has it filed a tax return on Form 990-T for this year?

6	X
7	X

7 Did the foundation have at least \$5,000 in assets at any time during the year?

If "Yes," complete Part II, col. (c), and Part XV.

7	X
8b	X

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

WA

8b	X
9	X

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation

9	X
10	X

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV.

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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Part VII-A Statements Regarding Activities (continued)

11		X
12		X
13	X	
14	Telephone no ► 425-709-4209	
15	► 15	N/A ►

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	N/A	
Organizations relying on a current notice regarding disaster assistance check here ►		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b	
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4a	X
	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

 Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

 Yes No Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

 Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

 Yes No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

Organizations relying on a current notice regarding disaster assistance check here ►

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

 Yes No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

 Yes No

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

If you answered "Yes" to 6b, also file Form 8870.

 Yes No

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

 Yes No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(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, other allowances
SEE STATEMENT 13		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If 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, other allowances
NONE				

Total number of other employees paid over \$50,000

►

0

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Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	
1	N/A
2	
3	
4	

Part IX-B | Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	0.
2		
3	All other program-related investments. See instructions	
Total. Add lines 1 through 3.		0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes	1a	9,160,667.
a Average monthly fair market value of securities	1b	549,566.
b Average of monthly cash balances	1c	749.
c Fair market value of all other assets	1d	9,710,982.
d Total (add lines 1a, b, and c)		
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	9,710,982.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	145,665.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	9,565,317.
6 Minimum investment return. Enter 5% of line 5	6	478,266.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► and do not complete this part)

1 Minimum investment return from Part X, line 6	1	478,266.
2a Tax on investment income for 2008 from Part VI, line 5	2a	2,784.
b Income tax for 2008 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	2,784.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	475,482.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	475,482.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	475,482.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	548,842.
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1b	0.
b Program-related investments - total from Part IX-B		
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	548,842.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	2,784.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	546,058.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				475,482.
2 Undistributed income, if any, as of the end of 2007			245,665.	
a Enter amount for 2007 only				
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ► \$ 548,842.			245,665.	
a Applied to 2007, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				303,177.
e Remaining amount distributed out of corpus	0.			0.
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				172,305.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

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Part XIV **Private Operating Foundations** (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling
b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ► if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a. The name, address, and telephone number of the person to whom applications should be addressed.

SEE STATEMENT 14

b The form in which applications should be submitted and information and materials they should include:

6 Any submission deadlines.

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
SEE STATEMENT 15				
Total			► 3a	493,754.
<i>b Approved for future payment</i>				
NONE				
Total			► 3b	0.

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

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		
1 Program service revenue				
a				
b				
c				
d				
e				
f				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
3 Interest on savings and temporary cash investments			14	165,093.
4 Dividends and interest from securities			14	118,919.
5 Net rental income or (loss) from real estate				
a Debt-financed property				
b Not debt-financed property				
6 Net rental income or (loss) from personal property				
7 Other investment income				
8 Gain or (loss) from sales of assets other than inventory			18	-40,913.
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue				
a				
b				
c				
d				
e				
12 Subtotal Add columns (b), (d), and (e)		0.	243,099.	0.
13 Total. Add line 12, columns (b), (d), and (e)			13	243,099.
(See worksheet in line 12 instructions to verify calculations.)				

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

823821
01-02-09

THE HERBERT JONES FOUNDATION
C/O KEYBANK NATIONAL ASSOCIATION, TTEE

Form 990-PF (2008)

94-3124801

Page 13

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
(1)	Cash	1a(1)	X
(2)	Other assets	1a(2)	X
b	Other transactions		
(1)	Sales of assets to a noncharitable exempt organization	1b(1)	X
(2)	Purchases of assets from a noncharitable exempt organization	1b(2)	X
(3)	Rental of facilities, equipment, or other assets	1b(3)	X
(4)	Reimbursement arrangements	1b(4)	X
(5)	Loans or loan guarantees	1b(5)	X
(6)	Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received		

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? .. .

b If "Yes," complete the following schedule.		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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 taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of officer or trustee		Date	Title	
Paid Preparer's Use Only	Preparer's signature	► <i>Mary Ann Petersel</i>	Date 1/23/10	Check if self- employed ► <input type="checkbox"/>
	Firm's name (or yours) If self-employed, address, and ZIP code			Preparer's identifying number EIN ►
► HAGEN, KURTH, PERMAN & CO., P.S. 601 UNION ST., SUITE 2700 SEATTLE, WA 98101-2392			Phone no 206 682-9200	

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01-02-09

HERBERT B JONES FOUNDATION
EIN: 94-3124801
2008 FORM 990-PF
SCHEDULE D ATTACHMENT

HERBERT B JONES FOUNDATION M/AG 40
Schedule D Detail of Short-term Capital Gains and Losses

HERBERT B JONES FOUNDATION
 EIN: 94-3124801
 2008 FORM 990-PF
 SCHEDULE D ATTACHMENT

HERBERT B JONES FOUNDATION M/AG 40
 Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
151 RATE CAPITAL GAINS (LOSSES)					
100000. WAL MART STORES INC NOTE	09/26/2001	10/01/2008	100,000.00	100,000.00	
861. GENERAL ELEC CO COM	07/07/2006	10/17/2008	17,370.40	28,697.13	-11,326.73
1639. GENERAL ELEC CO COM	02/27/1995	10/17/2008	33,066.31	14,949.05	18,117.26
600. MERRILL LYNCH & CO INC COM	05/17/1999	10/22/2008	11,103.11	23,565.00	-12,461.89
300. MERRILL LYNCH & CO INC COM	04/02/2001	10/22/2008	5,551.56	11,481.00	-5,929.44
200. MERRILL LYNCH & CO INC COM	09/26/2001	10/22/2008	3,701.04	7,590.00	-3,888.96
1500. STERICYCLIC INC COM	12/24/2001	12/10/2008	80,357.39	35,595.53	44,761.86
800. AMGEN INC COM	08/12/2004	12/18/2008	47,285.73	44,138.24	2,947.49
500. GENENTECH INC COM	07/31/2006	12/18/2008	39,782.77	40,320.00	-537.23
1000. ISHARES S&P SMALLCAP 600	12/22/2003	12/18/2008	130,543.36	131,860.00	-1,316.64
700. WATERS CORP COM	05/14/2004	12/24/2008	25,314.87	30,615.15	-5,320.28
700. WATERS CORP COM	07/31/2005	12/24/2008	25,314.87	28,686.00	-3,371.13
2500. WATERS CORP COM	07/05/2004	12/24/2008	90,410.23	83,483.24	6,926.99
200. JOHNSON & JOHNSON COM	11/07/2001	01/08/2009	11,750.77	11,858.62	-107.85
500. JOHNSON & JOHNSON COM	07/03/2002	01/08/2009	29,376.93	29,250.00	126.93
500. JOHNSON & JOHNSON COM	02/05/2002	01/08/2009	29,376.94	27,775.00	1,601.94
900. JOHNSON & JOHNSON COM	02/12/2004	01/08/2009	52,878.48	49,185.00	3,693.48
50. STARBUCKS CORP COM	03/29/2004	01/12/2009	490.00	945.00	-455.00
1000. STARBUCKS CORP COM	01/15/2004	01/12/2009	29,399.83	50,385.00	-20,985.17
1150. NIKE INC COM CL B	03/20/2006	01/13/2009	57,855.71	49,245.88	8,609.83
2200. QUEST DIAGNOSTICS INC COM	07/27/2005	01/13/2009	105,469.38	104,585.57	883.81
503. METLIFE INC COM	11/10/2006	01/14/2009	13,795.10	29,168.47	-15,373.17
497. METLIFE INC COM	11/10/2006	01/14/2009	13,630.54	28,816.06	-15,185.52
200. ISHARES S&P MIDCAP 400					
INDEX FD CLOSED-END FUND	08/31/2006	01/15/2009	9,741.94	15,020.00	-5,278.06
300. OCCIDENTAL PETRO CORP DEL	01/03/2008	01/15/2009	15,777.33	24,021.61	-8,244.18
400. OCCIDENTAL PETRO CORP DEL	01/15/2008	01/15/2009	21,036.44	8,844.00	12,192.44
200. STERICYCLE INC COM	12/24/2003	01/15/2009	41,333.52	21,357.31	19,976.21
400. ISHARES S&P MIDCAP 400					
INDEX FD CLOSED-END FUND	08/31/2006	02/06/2009	20,775.88	30,040.00	-9,264.12
100000. PFT200 INC NOTE	09/24/2001	03/02/2009	100,000.00	99,239.00	761.00
100. TRAVELERS COS INC COM	05/13/2006	04/30/2009	4,060.01	4,602.39	-542.38
Totals					

000701000

BCA196 9095 12/11/2009 40-104240809340

STATEMENT 6

HERBERT B JONES FOUNDATION
 EIN: 94-3124801
 2008 FORM 990-PF
 SCHEDULE D ATTACHMENT

HERBERT B JONES FOUNDATION M/AG 40
 Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long Term Gain/Loss
1100 TRAVELERS COS INC COM	07/11/2006	04/10/2009	44,660.06	50,369.00	-5,708.94
1100 TRAVELERS COS INC COM	05/16/2006	04/10/2009	44,660.05	49,335.00	-4,674.95
50 AFLAC INC COM	11/03/2005	05/13/2009	1,639.86	2,381.00	-741.14
850 AFLAC INC COM	07/07/2006	05/13/2009	27,877.58	39,083.00	-11,205.42
2100 AFLAC INC COM	06/09/2004	05/13/2009	68,874.02	86,125.40	-17,251.38
1100 MICROSOFT CORP COM	07/20/2004	05/19/2009	22,472.42	31,020.00	-8,547.58
1000 STERICYCLE INC COM	12/24/2003	05/19/2009	52,071.86	23,730.35	28,341.51
500 OCCIDENTAL PETE CORP DEL	01/15/2004	05/26/2009	31,549.18	11,055.00	20,494.18
705 PEPSICO INC COM	08/05/2005	08/10/2009	40,327.85	38,394.30	1,933.55
400 PEPSICO INC COM	01/07/2005	08/10/2009	22,881.05	21,022.52	1,858.53
115 PEPSICO INC COM	02/12/2004	08/10/2009	6,578.30	5,849.79	728.51
870 PROCTER & GAMBLE CO COM	11/06/2007	08/10/2009	45,291.03	61,314.29	-16,023.26
200 STRYKER CORP COM	08/26/2004	08/10/2009	8,167.81	9,225.82	-1,058.01
675 STRYKER CORP COM	11/03/2005	08/10/2009	27,566.36	29,119.50	-1,553.14
1600 STRYKER CORP COM	12/24/2003	08/10/2009	65,342.48	66,053.60	-711.12
100000 AMERICAN GENERAL FINANCE CORP MED TERM NT	03/23/2003	08/18/2009	87,501.00	101,020.00	-13,519.00
250000 PROCTER & GAMBLE INTL FINANCE FGN NT	02/13/2008	08/19/2009	250,000.00	250,232.50	-232.50
500 PRAXAIR INC COM	07/07/2006	08/26/2009	38,013.02	27,031.35	10,981.67
830 PROCTER & GAMBLE CO COM	11/06/2007	08/26/2009	43,841.46	58,495.25	-14,653.79
TOTAL 15% RATE CAPITAL GAINS (LOSSES)			2095866.00	2126397.00	-30,531.00
Total			2095866.00	2126397.00	-30,531.00

500071.000

BCA196 9095 12/11/2009 40-104240809340

STATEMENT 7

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FORM 990-PF

GAIN OR (LOSS) FROM SALE OF ASSETS

STATEMENT 1

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
SHORT-TERM CAPITAL LOSS - SEE ATTACHED DETAIL		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
54,827.	61,770.	0.	0.				-6,943.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
LONG-TERM CAPITAL GAIN - SEE ATTACHED DETAIL		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
2,095,866.	2,126,397.	0.	0.				-30,531.

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
OTHER NON-CASH ADJUSTMENTS		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
0.	2,475.	0.	0.				-2,475.

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED		DATE SOLD
				PURCHASED	VARIOUS	
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS		
0.	964.	0.	0.	0.		-964.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	-40,913.

FORM 990-PF	INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS	STATEMENT	2
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SOURCE	AMOUNT
KEY BANK - CORPORATE INTEREST	97,165.
KEY BANK - FOREIGN INTEREST	6,385.
KEY BANK - US GOVT INTEREST	61,543.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	165,093.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	3
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
KEY BANK - FOREIGN DIVIDENDS	10,650.	0.	10,650.
KEY BANK - OTHER DIVIDENDS	97,220.	0.	97,220.
KEY BANK - USGI DIVIDENDS	11,049.	0.	11,049.
TOTAL TO FM 990-PF, PART I, LN 4	118,919.	0.	118,919.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	1,665.	832.		833.
TO FORM 990-PF, PG 1, LN 16B	1,665.	832.		833.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EVERTRUST FEES & COMMISSIONS	55,354.	2,768.		52,586.
TO FORM 990-PF, PG 1, LN 16C	55,354.	2,768.		52,586.

FORM 990-PF

TAXES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAXES PAID	7,060.	0.		0.
FOREIGN TAXES PAID	960.	960.		0.
TO FORM 990-PF, PG 1, LN 18	8,020.	960.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MEMBERSHIP - ASSOCIATION OF SMALL FOUNDATIONS	495.	0.		495.
WEBSITE MAINTENANCE	83.	0.		83.
WASHINGTON STATE FILING FEES	25.	12.		13.
FIDELITY BOND INSURANCE PREMIUM	1,200.	600.		600.

THE HERBERT JONES FOUNDATION C/O KEYBANK

94-3124801

ANNUAL BOARD MEETING	955.	477.	478.
TO FORM 990-PF, PG 1, LN 23	2,758.	1,089.	1,669.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. AGENCY BOND	X		956,730.	1,012,596.
US TREASURY BONDS/NOTES	X		782,416.	805,295.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,739,146.	1,817,891.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,739,146.	1,817,891.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK	3,470,606.	4,227,934.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,470,606.	4,227,934.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	905,879.	947,015.
TOTAL TO FORM 990-PF, PART II, LINE 10C	905,879.	947,015.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME INVESTMENTS	COST	791,535.	793,728.
EQUITY INVESTMENTS	COST	1,200,880.	1,297,665.
LONG TERM FLOATING BONDS	COST	399,450.	143,934.
FOREIGN BONDS	COST	350,449.	355,633.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,742,314.	2,590,960.

FORM 990-PF

OTHER ASSETS

STATEMENT 12

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SECURITY SALES PROCEEDS			
RECEIVABLE	0.	136,682.	136,682.
TO FORM 990-PF, PART II, LINE 15	0.	136,682.	136,682.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN EXPENSE CONTRIB ACCOUNT		
			BEN	PLAN	EXPENSE ACCOUNT
MICHAEL BAUER C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
JANET WOODS C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
BILL ERWERT C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
GARY KUHAR C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
TERRY SMITH C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
NANCY LEMKE C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
TOM CRHA C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
JUDY KLINKHAM C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

HERBERT B. JONES FOUNDATION C/O KEYBANK NATIONAL ASSOCIATION,
601 - 108TH AVENUE NE SUITE 260
BELLEVUE, WA 98004

TELEPHONE NUMBER

FORM AND CONTENT OF APPLICATIONS

SEE GRANT APPLICATION FORM ATTACHED.

ANY SUBMISSION DEADLINES

APRIL 1

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION PROMOTES ENTREPRENEURISM AND SMALL BUSINESS THROUGH THE INITIAL AND TEMPORARY SUPPORT OF NEW BUSINESS PROGRAMS MANAGED BY POST-SECONDARY EDUCATIONAL ENTITIES IN THE STATE OF WASHINGTON. SEE MISSION STATEMENT ON GRANT APPLICATION.

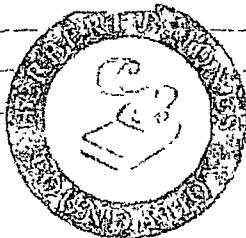
FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ENTERPRISE FOR EQUITY	NONE GREEN ENTERPRISE	EDUCATION	39,000.
GONZAGA UNIVERSITY	NONE BUSINESS PLAN COMPETITION	EDUCATION	20,000.
GONZAGA UNIVERSITY	NONE COLLABORATION WITH SPOKANE CC	EDUCATION	30,000.
HERITAGE COLLEGE	NONE INTERNSHIPS	EDUCATION	25,000.
N W SCHOOL FOR HEARING-IMPAIRED CHILDREN	NONE GENERAL FUND	EDUCATION	30,746.
N W SCHOOL FOR HEARING-IMPAIRED CHILDREN	NONE TEACHER PROGRAM	EDUCATION	36,000.
NORTHWEST ENTREPRENEUR NETWORK	NONE ENTREPRENEUR UNIVERSITY	EDUCATION	22,000.
SEATTLE PACIFIC UNIVERSITY	NONE MENTOR PROGRAMS	EDUCATION	9,008.
SEATTLE PACIFIC UNIVERSITY	NONE SOCIAL VENTURE COMPETITION	EDUCATION	20,000.
SEATTLE UNIVERSITY	NONE STUDENTS IN FREE ENTERPRISE	EDUCATION	30,000.

UNIVERSITY OF WASHINGTON	NONE BUSINESS PLAN COMPETITION	EDUCATION	25,000.
UNIVERSITY OF WASHINGTON LAW SCHOOL	NONE LAW SCHOOL CLINIC	EDUCATION	29,000.
SHORELINE COMMUNITY COLLEGE	NONE SMALL BUSINESS ACCELERATOR	EDUCATION	38,000.
STONE SOUP	NONE RURAL ENTREPRENEUR	EDUCATION	13,000.
WASHINGTON STATE UNIVERSITY	NONE CAMPUS ENTREPRENEUR	EDUCATION	27,000.
EVERETT COMMUNITY COLLEGE	NONE ENTREPRENEUR DEGREE	EDUCATION	35,000.
PACIFIC LUTHERAN UNIVERSITY	NONE IMPACT CASE COMPETITION	EDUCATION	20,000.
SPOKANE COMMUNITY COLLEGE	NONE ENTREPRENEUR COLLABORATION	EDUCATION	15,000.
UNIVERSITY OF WASHINGTON BOTHELL	NONE BUSINESS DEVELOPMENT CENTER	EDUCATION	15,000.
WASHINGTON CASH	NONE MICRO ENTERPRISE DEVELOPMENT	EDUCATION	15,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			<u>493,754.</u>



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[Grant History](#)

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HERBERT JONES FOUNDATION GRANT APPLICATION

MISSION STATEMENT

The Herbert B. Jones Foundation believes that entrepreneurship and small business are the backbone for the strength of our economic system.

We promote this belief through the initial and temporary support of new business programs managed by post-secondary educational entities in the state of Washington.

We desire the business community to be a vibrant and productive environment and the recipients of the Foundation's support to positively impact our greater business community.

GUIDELINES

- Grant requests will be for fiscal years, starting September 1
- Grant requests are due by the first Monday in April.
- Maximum 2 requests for consideration: a. A request can contain two or more inter-related, dependent segments, b. Each segment must show its need for other segments' accomplishment
- The minimum font size: 11
- Grants funds will not be provided for equipment, capital projects, gifts, endowments, or food costs
- Applicants must adhere strictly to format
- Please provide (5) stapled copies to: Herbert B. Jones Foundation c/o Evertrust Asset Management, 505 5th Ave S, Ste. 170, Seattle, WA 98104
- The Foundation may make inquiries before, and will formally respond within 8 weeks

APPLICATION FORMAT

Name of Organization/Amount Requested/Time

Period Requested
Description/summary of program (Maximum 2
pages)

- Goals/objectives of program; i.e. how do these relate to HBJ mission statement?
- Results expected; i.e. how do the results satisfy HBJ goals?
- Target population; i.e. who benefits?
- Key staff and number of students to be involved
- Plan for measuring program results; i.e. how do you know you have succeeded?

**PROGRAM BUDGET (MAXIMUM 1
PAGE)**

- Detailed itemization of costs for each program and HBJ's funding portion
- Other funding resources; participant payments, grants, gifts, other
- Timetable of anticipated organizational expenditures

**APPENDIX (NOT REQUIRED IF
PREVIOUSLY PROVIDED)**

- Resume summary page (no more than ½ a page for each)
- History and mission of the organization
- Board and affiliations
- Overall Structure; description of sub-unit utilizing grant
- Evidence that your organization is a qualified tax-exempt organization capable of receiving grants from a private foundation

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