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# Return of Organization Exempt From Income Tax

Under 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.

OMB No 1545-0047

**2008**

**Open to Public Inspection**

**A** For the 2008 calendar year, or tax year beginning **10/1/2008**, and ending **9/30/2009**

**B** Check if applicable:  
☐ Address change  
☐ Name change  
☐ Initial return  
☐ Termination  
☐ Amended return  
☐ Application pending

**C** Name of organization **Beth Israel Deaconess Department of Medicine**  
 Doing Business As  
 Number and street (or P O box if mail is not delivered to street address) Room/suite  
**330 Brookline Avenue** **YA-419**  
 City or town, state or country, and ZIP + 4  
**Boston MA 02215**

**D** Employer identification number  
**04-3079630**

**E** Telephone number  
**(617) 667-1050**

**G** Gross receipts \$ **2,568,324**

**F** Name and address of principal officer  
**Mark L. Zeidel, President 330 Brookline Avenue, Boston, MA 02215**

**H(a)** Is this a group return for affiliates? ☐ Yes ☒ No  
**H(b)** Are all affiliates included? ☐ Yes ☐ No  
 If "No," attach a list. (see instructions)

**I** Tax-exempt status: ☒ 501(c) ( 3 ) ◀ (insert no ) ☐ 4947(a)(1) or ☐ 527

**J** Website: ► **N/A**

**K** Type of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other ►

**L** Year of formation **1990**

**M** State of legal domicile **MA**

**Part I Summary**

**1** Briefly describe the organization's mission or most significant activities: The mission of Beth Israel Deaconess Department of Medicine Foundation, Inc. is to support medical research, provide instruction and participate in activities designed to improve the general public health and the health of patients served by Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc. (HMFP) and Beth Israel Deaconess Medical Center (BIDMC) and their affiliated organizations.

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

**3** Number of voting members of the governing body (Part VI, line 1a) **3** **6**

**4** Number of independent voting members of the governing body (Part VI, line 1b) **4** **0**

**5** Total number of employees (Part V, line 2a) **5** **0**

**6** Total number of volunteers (estimate if necessary) **6** **0**

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

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

	Prior Year	Current Year
<b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .	1,766,808	1,036,917
<b>9</b> Program service revenue (Part VIII, line 2g) . . . . .	605,126	1,389,454
<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .	543,331	-95,204
<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . . .	239,081	0
<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .	3,154,346	2,331,167
<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3) . . . . .	0	0
<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .	0	0
<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10) . . . . .	8,325	0
<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .	0	0
<b>16b</b> Total fundraising expenses (Part IX, column (D), line 25) ► <b>0</b>		
<b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f) . . . . .	2,760,334	1,646,706
<b>18</b> Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25) . . . . .	2,768,659	1,646,706
<b>19</b> Revenue less expenses. Subtract line 18 from line 12 . . . . .	385,687	684,461
<b>20</b> Total assets (Part X, line 16) . . . . .	Beginning of Year 9,433,293	End of Year 9,920,393
<b>21</b> Total liabilities (Part X, line 26) . . . . .	725,145	436,432
<b>22</b> Net assets or fund balances. Subtract line 21 from line 20 . . . . .	8,708,148	9,483,961

**Part II Signature Block**

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

**Signature of officer** *[Signature]* **Date** **8-9-10**

**Mark L. Zeidel, President**  
Type or print name and title

**Preparer's signature** *[Signature]* **Date** **8-3-10** **Check if self-employed** ☐ **Preparer's identifying number (see instructions)** **700037953**

**Firm's name (or yours if self-employed), address, and ZIP + 4** **KPMG, LLP**  
**Two Financial Center 60 South Street Boston, MA 02111**

**EIN** **13-5565207** **Phone no** **617-988-1000**

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

**Part III Statement of Program Service Accomplishments** (see instructions)**1** Briefly describe the organization's mission.

The mission of Beth Israel Deaconess Department of Medicine Foundation, Inc. is to support medical research, provide instruction and participate in activities designed to improve the general public health and the health of patients served by Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc. (HMFP) and Beth Israel Deaconess Medical Center (BIDMC) and their affiliated organizations.

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the exempt purpose achievements for each of the organization's three largest program services by expenses.

Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ 973,014 including grants of \$ 0 ) (Revenue \$ 1,389,454 )

Beth Israel Deaconess Department of Medicine Foundation, Inc. (BIDDM) plans and administers continuing medical education (CME) courses and seminars held at Beth Israel Deaconess Medical Center (BIDMC) and Harvard Medical School (HMS). The majority of the courses are presented in conjunction with HMS. These programs provide continuing education opportunities for physicians both from the Boston area and throughout the United States. Some courses also attract participants from other countries. The Foundation offers numerous annual CME courses on a wide variety of medical specialties, for example Cardiology, Gastroenterology, Infectious Diseases, Internal Medicine, Nephrology and Pulmonary Medicine. Physicians attending these courses receive continuing education units for maintenance of their licensure and incorporation of new knowledge to improve quality medical care for patients and their communities.

**4b** (Code: ) (Expenses \$ 306,275 including grants of \$ 0 ) (Revenue \$ 0 )

BIDDM provides salary and medical support to cover some expenses incurred by physician and research faculty working for Harvard Medical Faculty Physicians (HMFP) at BIDMC and/or BIDMC. In 2009, BIDDM provided extensive support to a multi-disciplinary effort focusing on Matrix Biology. The Foundation has provided ongoing support to an HIV related research program. BIDDM provides financial support to BIDMC and HMFP for a portion of the salary costs of Department of Medicine physicians and support personnel who provide health care services to BIDMC patients. BIDDM sponsors numerous educational Grand Rounds for the Department of Medicine each year. Distinguished physicians give lectures in their area of expertise. These lectures are a fundamental piece of education of medical trainees (interns, residents, and fellows). Physicians receive payment toward travel expenses and registration costs to attend national conferences for professional development. Emphasis is placed on supporting clinical fellows who are still at the level of trainee, and often financially unable to pay for the conferences out of pocket.

**4c** (Code: ) (Expenses \$ 0 including grants of \$ 0 ) (Revenue \$ 0 )

**4d** Other program services. (Describe in Schedule O.)

(Expenses \$ 0 including grants of \$ 0 ) (Revenue \$ 0 )

**4e** Total program service expenses ▶ \$ 1,279,289 (Must equal Part IX, Line 25, column (B).)

**Part IV Checklist of Required Schedules**

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A . . . . .	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? . . . . .	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I . . . . .		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II . . . . .	X	
5 <b>Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations.</b> Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III . . . . .		
6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I . . . . .		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II . . . . .		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III . . . . .		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV . . . . .		X
10 Did the organization hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V . . . . .		X
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable . . . . .	X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? If "Yes," complete Schedule D, Parts XI, XII, and XIII . . . . .		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E . . . . .		X
14a Did the organization maintain an office, employees, or agents outside of the U.S.? . . . . .		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? If "Yes," complete Schedule F, Part I . . . . .		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II . . . . .		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III . . . . .		X
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? If "Yes," complete Schedule G, Part I . . . . .		X
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II . . . . .		X
19 Did the organization report more than \$15,000 on Part VIII, line 9a? If "Yes," complete Schedule G, Part III . . . . .		X
20 Did the organization operate one or more hospitals? If "Yes," complete Schedule H . . . . .		X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II . . . . .		X
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III . . . . .		X
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J . . . . .	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25 . . . . .		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .		
25a <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I . . . . .		X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If "Yes," complete Schedule L, Part I . . . . .		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II . . . . .		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? If "Yes," complete Schedule L, Part III . . . . .		X

**Part IV Checklist of Required Schedules (continued)**

	Yes	No
<b>28</b> During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
<b>a</b> Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If "Yes," complete Schedule L, Part IV</i>		X
<b>b</b> Have a family member who had a direct or indirect business relationship with the organization? <i>If "Yes," complete Schedule L, Part IV</i>	X	
<b>c</b> Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	X	
<b>35</b> Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable.	81	
<b>1b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	0	
<b>1c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.		
<b>2b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)		
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
<b>3b</b>	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.		
<b>4a</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)?		X
<b>4b</b>	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
<b>5b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
<b>5c</b>	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
<b>6a</b>	Did the organization solicit any contributions that were not tax deductible?		X
<b>6b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>7a</b>	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?		X
<b>7b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
<b>7c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
<b>7d</b>	If "Yes," indicate the number of Forms 8282 filed during the year.		
<b>7e</b>	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>7f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
<b>7g</b>	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
<b>7h</b>	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
<b>8</b>	<b>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
<b>9</b>	<b>Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.</b>		
<b>9a</b>	Did the organization make any taxable distributions under section 4966?		
<b>9b</b>	Did the organization make a distribution to a donor, donor advisor, or related person?		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>10a</b>	Initiation fees and capital contributions included on Part VIII, line 12		
<b>10b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>11a</b>	Gross income from members or shareholders		
<b>11b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		
<b>12b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.		

**Part VI Governance, Management, and Disclosure** (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)**Section A. Governing Body and Management**

For each "Yes" response to lines 2–7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body . . . . .	6	
<b>1b</b> Enter the number of voting members that are independent . . . . .	0	
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . . . .	X	
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? . . . . .		X
<b>4</b> Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed? . . . . .		X
<b>5</b> Did the organization become aware during the year of a material diversion of the organization's assets? . . . . .		X
<b>6</b> Does the organization have members or stockholders? . . . . .	X	
<b>7a</b> Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? . . . . .		X
<b>7b</b> Are any decisions of the governing body subject to approval by members, stockholders, or other persons? . . . . .	X	
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? . . . . .	X	
<b>b</b> Each committee with authority to act on behalf of the governing body? . . . . .	X	
<b>9a</b> Does the organization have local chapters, branches, or affiliates? . . . . .		X
<b>9b</b> If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization? . . . . .		
<b>10</b> Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990 . . . . .		X
<b>11</b> Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O . . . . .		X

**Section B. Policies**

	Yes	No
<b>12a</b> Does the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	X	
<b>12b</b> Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	X	
<b>12c</b> Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done . . . . .	X	
<b>13</b> Does the organization have a written whistleblower policy? . . . . .		X
<b>14</b> Does the organization have a written document retention and destruction policy? . . . . .		X
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
<b>a</b> The organization's CEO, Executive Director, or top management official? . . . . .	X	
<b>b</b> Other officers or key employees of the organization? . . . . .	X	
Describe the process in Schedule O. (see instructions).		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . . . .		X
<b>16b</b> If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? . . . . .		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ► MA

**18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.

☐ Own website ☒ Another's website ☒ Upon request

**19** Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► Joanne Casella (617) 667-1050  
330 Brookline Avenue, Boston, MA 02215-5400

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**
**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

**1a** Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

☐ Check this box if the organization did not compensate any officer, director, trustee, or key employee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Goldberger, M.D. Ary Diseae-HMFP at BIDMC	5	X						2,120	219,030	37,204
Levy, Paul President, & CEO-BIDMC, Director-HMFP at BIDMC, CVMA, BIAF, OB/Gyn Fdn, Pathology Fdn; Surgery Fdn, Trustee BIDN	5	X						0	1,108,958	164,846
Rosenberg, M.D. Stuart A. Director- CVMA, Derm Fdn, Neonat Fdn, Ortho Surg Fdn, Surg Fdn, CEP, President-CAHMFP & APHMFP, Director & CEO- Rad Fdn	5	X						0	633,173	60,061
Zeidel, M.D. Mark L. Ex-Officio & Chief (MED)-BIDMC; Director-CVMA, APG, Professor of Medicine- Harvard Medical School	5	X		X				2,690	635,266	62,604
Schnipper, M.D., Lowell E.  Treasurer- BIDDM, Physician, Medical Oncology- HMFP at BIDMC; Professor of Medicine- Harvard Medical School	5	X		X				2,830	297,463	46,493
Weller, M.D. Peter F.  Clerk-BIDDM, Physician, Infectious Disease- HMFP at BIDMC	5	X		X				1,250	233,057	38,704
Moellering, M.D. Robert C at BIDMC; Former Director Ex-Officio/ Former Chief of Medicine- BIDMC	0	X		X			X	1,080	158,043	25,165
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0
	0							0	0	0

[illegible]

2	Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization	7
---	---	---

	Yes	No
3	X	
4	X	
5		X

4	X	
---	---	--

		
5		X

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation
		0
		0
		0
		0
		0

2	Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization	0
---	---	---

**Part VIII Statement of Revenue**

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under section 512, 513, or 514
<b>Contributions, gifts, grants and other similar amounts</b>	1a	Federated campaigns	1a	0			
	b	Membership dues	1b	0			
	c	Fundraising events	1c	0			
	d	Related organizations	1d	507,704			
	e	Government grants (contributions)	1e	0			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	529,213			
	g	Noncash contributions included in lines 1a-1f: \$		0			
	h	<b>Total.</b> Add lines 1a-1f		1,036,917			
<b>Program Service Revenue</b>			<b>Business Code</b>				
	2a	Education Programs	541700	1,389,454	1,389,454		
	b			0			
	c			0			
	d			0			
	e			0			
	f	All other program service revenue					
	g	<b>Total.</b> Add lines 2a-2f		1,389,454			
<b>Other Revenue</b>	3	Investment income (including dividends, interest, and other similar amounts)		141,954			141,954
	4	Income from investment of tax-exempt bond proceeds		0			
	5	Royalties		0			
	6a	Gross Rents	(i) Real	(ii) Personal			
	b	Less: rental expenses					
	c	Rental income or (loss)	0	0			
	d	Net rental income or (loss)			0		
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
	b	Less: cost or other basis and sales expenses	237,158	0			
	c	Gain or (loss)	-237,158	0			
	d	Net gain or (loss)			-237,158		-237,158
	8a	Gross income from fundraising events (not including \$ 0 of contributions reported on line 1c). See Part IV, line 18	a	0			
	b	Less: direct expenses	b	0			
	c	Net income or (loss) from fundraising events			0		
	9a	Gross income from gaming activities. See Part IV, line 19	a	0			
	b	Less: direct expenses	b	0			
	c	Net income or (loss) from gaming activities			0		
	10a	Gross sales of inventory, less returns and allowances	a	0			
	b	Less: cost of goods sold	b	0			
	c	Net income or (loss) from sales of inventory			0		
<b>Miscellaneous Revenue</b>		<b>Business Code</b>					
11a			0				
b			0				
c			0				
d	All other revenue		0				
e	<b>Total.</b> Add lines 11a-11d		0				
12	<b>Total Revenue.</b> Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e		2,331,167	1,389,454	0	-95,204	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21 . . . . .	0			
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22 . . . . .	0			
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16 . . . . .	0			
4 Benefits paid to or for members . . . . .	0			
5 Compensation of current officers, directors, trustees, and key employees . . . . .	0			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .	0			
7 Other salaries and wages . . . . .	0			
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions) . . . . .	0			
9 Other employee benefits . . . . .	0			
10 Payroll taxes . . . . .	0			
11 Fees for services (non-employees):				
a Management . . . . .	0			
b Legal . . . . .	4,212		4,212	
c Accounting . . . . .	0			
d Lobbying . . . . .	0			
e Professional fundraising services. See Part IV, line 17	0			
f Investment management fees . . . . .	58,543		58,543	
g Other . . . . .	43,213	34,776	8,437	
12 Advertising and promotion . . . . .	0			
13 Office expenses . . . . .	110,130		110,130	
14 Information technology . . . . .	0			
15 Royalties . . . . .	0			
16 Occupancy . . . . .	0			
17 Travel . . . . .	127,786	127,786		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .	0			
19 Conferences, conventions, and meetings . . . . .	0			
20 Interest . . . . .	0			
21 Payments to affiliates . . . . .	0	0	0	0
22 Depreciation, depletion, and amortization . . . . .	0	0	0	0
23 Insurance . . . . .	0			
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below )				
a Dues . . . . .	6,663		6,663	
b Educational Program Costs . . . . .	555,950	555,950		
c Postage . . . . .	142,059	142,059		
d Honoraria . . . . .	227,025	227,025		
e Affiliated Support Expenses . . . . .	371,125	191,693	179,432	
f All other expenses . . . . .	0			
25 Total functional expenses. Add lines 1 through 24f	1,646,706	1,279,289	367,417	0
26 Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation . . . . .				

**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash—non-interest-bearing . . . . .	394,148	1	553,832
	2 Savings and temporary cash investments . . . . .	297,544	2	2,496,009
	3 Pledges and grants receivable, net . . . . .	254,168	3	0
	4 Accounts receivable, net . . . . .	250,000	4	82,287
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L . . . . .	0	5	0
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L . . . . .	0	6	0
	7 Notes and loans receivable, net . . . . .	0	7	1,550,000
	8 Inventories for sale or use . . . . .		8	
	9 Prepaid expenses and deferred charges . . . . .	77,050	9	196,807
	10a Land, buildings, and equipment, cost basis . . . . .	0		
	b Less: accumulated depreciation. Complete Part VI of Schedule D . . . . .	0		
		0	10c	0
	11 Investments—publicly traded securities . . . . .	7,045,051	11	3,848,366
	12 Investments—other securities. See Part IV, line 11 . . . . .	0	12	0
	13 Investments—program-related. See Part IV, line 11 . . . . .	1,115,332	13	1,193,092
	14 Intangible assets . . . . .		14	
15 Other assets. See Part IV, line 11 . . . . .	0	15	0	
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	9,433,293	16	9,920,393	
<b>Liabilities</b>	17 Accounts payable and accrued expenses . . . . .	441,134	17	164,932
	18 Grants payable . . . . .		18	
	19 Deferred revenue . . . . .	284,011	19	271,500
	20 Tax-exempt bond liabilities . . . . .	0	20	0
	21 Escrow account liability. Complete Part IV of Schedule D . . . . .		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties . . . . .	0	23	0
	24 Unsecured notes and loans payable . . . . .	0	24	0
	25 Other liabilities. Complete Part X of Schedule D . . . . .	0	25	0
	26 <b>Total liabilities.</b> Add lines 17 through 25 . . . . .	725,145	26	436,432
<b>Net Assets or Fund Balances</b>	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets . . . . .	4,656,579	27	5,197,786
	28 Temporarily restricted net assets . . . . .	4,051,569	28	4,286,175
	29 Permanently restricted net assets . . . . .		29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds . . . . .		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund . . . . .		31	
	32 Retained earnings, endowment, accumulated income, or other funds . . . . .		32	
	33 <b>Total net assets or fund balances</b> . . . . .	8,708,148	33	9,483,961
	34 <b>Total liabilities and net assets/fund balances</b> . . . . .	9,433,293	34	9,920,393

**Part XI Financial Statements and Reporting**

	Yes	No
1 Accounting method used to prepare the Form 990. <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .	2a	X
b Were the organization's financial statements audited by an independent accountant? . . . . .	2b	X
c If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? . . . . .	2c	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .	3a	X
b If "Yes," did the organization undergo the required audit or audits? . . . . .	3b	

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

**Public Charity Status and Public Support**

OMB No 1545-0047

**2008**

**Open to Public  
Inspection**

Department of the Treasury  
Internal Revenue Service

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization

Beth Israel Deaconess Department of Medicine Foundation, Inc

Employer identification number

04-3079630

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

The organization is not a private foundation because it is: (Please check only one organization.)

- 1 ☐ A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
- 2 ☐ A school described in section 170(b)(1)(A)(ii). (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H.)
- 4 ☐ A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 8 ☐ A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)
- 9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See section 509(a)(4). (see instructions)
- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h.
  - a ☒ Type I
  - b ☐ Type II
  - c ☐ Type III—Functionally integrated
  - d ☐ Type III—Other

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

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

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

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization? . . . . .
- (ii) A family member of a person described in (i) above? . . . . .
- (iii) A 35% controlled entity of a person described in (i) or (ii) above? . . . . .

	Yes	No
11g(i)		X
11g(ii)		X
11g(iii)		X

h Provide the following information about the organizations the organization supports.

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
Beth Israel Deaconess Medical Center	04-2103881	3	X		X		X		192,168
Harvard Medical Faculty Physicians at BIDMC, Inc.	22-2768204	9	X		X		X		178,957
President and Fellows of Harvard College	04-2103580	2	X		X		X		0
									0
									0
<b>Total</b>									<b>371,125</b>

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") . . . . .	0	0	0			0
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .	0	0	0			0
3 The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .	0	0	0			0
4 <b>Total.</b> Add lines 1-3 . . . . .	0	0	0	0	0	0
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . . . .						
6 <b>Public support.</b> Subtract line 5 from line 4. . . . .						0

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4 . . . . .	0	0	0	0	0	0
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	0	0	0			0
9 Net income from unrelated business activities, whether or not the business is regularly carried on . . . . .						0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .	0	0	0			0
11 <b>Total support.</b> Add lines 7 through 10. . . . .						0
12 Gross receipts from related activities, etc. (see instructions.) . . . . .					12	
13 <b>First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> . . . . . ▶ <input type="checkbox"/>						

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

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f)) . . . . .	14	0.00%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f . . . . .	15	0.00%
16a <b>33 1/3% support test-2008.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
b <b>33 1/3% support test-2007.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . ▶ <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances-test-2008.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test-2007.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization. . . . . ▶ <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions . . . . . ▶ <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants") . . . . .	0	0	0			0
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose . . . . .	0	0	0			0
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 . . . . .						0
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .	0	0	0			0
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge . . . . .	0	0	0			0
<b>6</b> Total. Add lines 1-5 . . . . .	0	0	0	0	0	0
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons . . . . .						0
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000 . . . . .						0
<b>c</b> Add lines 7a and 7b . . . . .	0	0	0	0	0	0
<b>8</b> Public support (Subtract line 7c from line 6.) . . . . .						0

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>9</b> Amounts from line 6 . . . . .	0	0	0	0	0	0
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .						0
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 . . . . .						0
<b>c</b> Add lines 10a and 10b . . . . .	0	0	0	0	0	0
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on . . . . .						0
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) . . . . .	0	0	0			0
<b>13</b> Total support. (Add lines 9, 10c, 11, and 12) . . . . .						0
<b>14</b> First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here . . . . . ▶ <input type="checkbox"/>						

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

<b>15</b> Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f)) . . . . .	<b>15</b>	0.00%
<b>16</b> Public support percentage from 2007 Schedule A, Part IV-A, line 27g . . . . .	<b>16</b>	0.00%

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

<b>17</b> Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f)) . . . . .	<b>17</b>	0.00%
<b>18</b> Investment income percentage from 2007 Schedule A, Part IV-A, line 27h . . . . .	<b>18</b>	0.00%

- 19a** 33 1/3% support tests—2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization . . . ▶ ☐
- b** 33 1/3% support tests—2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization . . . ▶ ☐
- 20** Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions . . . ▶ ☐

**Part IV**

**Supplemental Information.** Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information (see instructions)

Area for supplemental information with horizontal dashed lines.

# Political Campaign and Lobbying Activities

**2008**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

**For Organizations Exempt From Income Tax Under section 501(c) and section 527**

- ▶ To be completed by organizations described below.
- ▶ Attach to Form 990 or Form 990-EZ.

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B. Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations. Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A. Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of organization Beth Israel Deaconess Department of Medicine Foundation, Inc	Employer identification number 04-3079630
--	--

**Part I-A To be completed by all organizations exempt under section 501(c) and section 527 organizations.**  
See the instructions for Schedule C for details.

- |   |   |      |   |
|---|---|------|---|
| 1 | Provide a description of the organization's direct and indirect political campaign activities in Part IV. |      |   |
| 2 | Political expenditures . . . . .  | ▶ \$ | 0 |
| 3 | Volunteer hours . . . . .   |      | 0 |

**Part I-B To be completed by all organizations exempt under section 501(c)(3).**  
See the instructions for Schedule C for details

- |    |   |      |  |
|----|---|------|--|
| 1  | Enter the amount of any excise tax incurred by the organization under section 4955 . . . . .      |      | ▶ \$ 0   |
| 2  | Enter the amount of any excise tax incurred by organization managers under section 4955 . . . . . | ▶ \$ | 0  |
| 3  | If the organization incurred a section 4955 tax, did it file Form 4720 for this year? . . . . .   |      | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4a | Was a correction made? . . . . .  |      | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| b  | If "Yes," describe in Part IV.  |      |  |

**Part I-C To be completed by all organizations exempt under section 501(c), except section 501(c)(3).**  
See the instructions for Schedule C for details.

- |   |  |      |  |
|---|--|------|--|
| 1 | Enter the amount directly expended by the filing organization for section 527 exempt function activities . . . . .   |      | ▶ \$   |
| 2 | Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities . . . . .  | ▶ \$ |  |
| 3 | Total of direct and indirect exempt function expenditures. Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b . . . . .   | ▶ \$ | 0  |
| 4 | Did the filing organization file Form 1120-POL for this year? . . . . .  |      | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5 | State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made. Enter the amount paid and indicate if the amount was paid from the filing organization's funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV. |      |  |

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-
			0	0
			0	0
			0	0
			0	0
			0	0
			0	0

**Part II-A** To be completed by organizations exempt under section 501(c)(3) that filed Form 5768  
(election under section 501(h)). See the instructions for Schedule C for details.

**A** Check ☐ if the filing organization belongs to an affiliated group.

**B** Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b>	Total lobbying expenditures to influence public opinion (grass roots lobbying) . . . . .	0	0												
<b>b</b>	Total lobbying expenditures to influence a legislative body (direct lobbying) . . . . .	0	0												
<b>c</b>	Total lobbying expenditures (add lines 1a and 1b) . . . . .	0	0												
<b>d</b>	Other exempt purpose expenditures . . . . .	0	0												
<b>e</b>	Total exempt purpose expenditures (add lines 1c and 1d) . . . . .	0	0												
<b>f</b>	Lobbying nontaxable amount Enter the amount from the following table in both columns.	0	0												
<table><tbody><tr><td>If the amount on line 1e, column (a) or (b) is:</td><td>The lobbying nontaxable amount is:</td></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000.</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></tbody></table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	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		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
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>g</b>	Grassroots nontaxable amount (enter 25% of line 1f) . . . . .	0	0												
<b>h</b>	Subtract line 1g from line 1a. Enter -0- if line g is more than line a . . . . .	0	0												
<b>i</b>	Subtract line 1f from line 1c. Enter -0- if line f is more than line c . . . . .	0	0												
<b>j</b>	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? . . . . .	<input type="checkbox"/> Yes <input type="checkbox"/> No													

**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 2a through 2f of the instructions.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) Total
<b>2a</b> Lobbying non-taxable amount	0	0	0		0
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					0
<b>c</b> Total lobbying expenditures	0	0	0		0
<b>d</b> Grassroots non-taxable amount	0	0	0		0
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					0
<b>f</b> Grassroots lobbying expenditures	0	0	0		0

**Part II-B** To be completed by organizations exempt under section 501(c)(3) that have NOT filed Form 5768 (election under section 501(h)). See the instructions for Schedule C for details.

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?		X	
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?		X	
c Media advertisements?		X	
d Mailings to members, legislators, or the public?		X	
e Publications, or published or broadcast statements?		X	
f Grants to other organizations for lobbying purposes?		X	
g Direct contact with legislators, their staffs, government officials, or a legislative body?		X	
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?		X	
i Other activities? If "Yes," describe in Part IV.	X		0
j Total lines 1c through 1i.			0
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		X	
b If "Yes," enter the amount of any tax incurred under section 4912.			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912.			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

**Part III-A** To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6). See the instructions for Schedule C for details.

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carryover lobbying and political expenditures from the prior year?	3	

**Part III-B** To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" OR if Part III-A, question 3 is answered "Yes." See Schedule C instructions for details.

1 Dues, assessments and similar amounts from members.	1	
2 Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year.	2a	
b Carryover from last year.	2b	
c Total.	2c	0
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues.	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4).	5	0

**Part IV** Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1; Part I-B, line 4, Part I-C, line 5; and Part II-B, line 1i. Also, complete this part for any additional information.

Part II-B Line 1i Beth Israel Deaconess Medical Center, one of the entities supported by Beth Israel Deaconess

Part II-B Line 1i Department of Medicine Foundation, Inc. may have engaged in some lobbying efforts on behalf of

Part II-B Line 1i this entity and other affiliated network entities. Additionally, the Foundation may pay dues to certain

Part II-B Line 1i membership organizations, a piece of which may be used by such organizations for lobbying

Part II-B Line 1i activities on behalf of this institution and other similiary situated organizations. Total lobbying expenses

Part II-B Line 1i on behalf of the Foundation were minimal and not substantial based upon revenues.

**Part IV** Supplemental Information *(continued)*

Area for supplemental information with horizontal dashed lines.

**SCHEDULE D  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ **Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.**

OMB No 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

Employer identification number

Beth Israel Deaconess Department of Medicine Foundation, Inc.

04-3079630

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year . . . . .		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year) . . . . .		
4 Aggregate value at end of year . . . . .		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? . . . . .		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? . . . . .		<input type="checkbox"/> Yes <input type="checkbox"/> No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or pleasure) ☐ Preservation of an historically important land area

☐ Protection of natural habitat ☐ Preservation of certified historic structure

☐ Preservation of open space

2 Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements . . . . .	2a
b Total acreage restricted by conservation easements . . . . .	2b
c Number of conservation easements on a certified historic structure included in (a) . . . . .	2c
d Number of conservation easements included in (c) acquired after 8/17/06 . . . . .	2d

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

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

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

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$

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

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

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

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

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 . . . . . ▶ \$

(ii) Assets included in Form 990, Part X . . . . . ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 . . . . . ▶ \$

b Assets included in Form 990, Part X . . . . . ▶ \$

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)**

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

- a ☐ Public exhibition d ☐ Loan or exchange programs  
 b ☐ Scholarly research e ☐ Other \_\_\_\_\_  
 c ☐ Preservation for future generations

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

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Trust, Escrow and Custodial Arrangements.** Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
c Beginning balance . . . . .	1c
d Additions during the year . . . . .	1d
e Distributions during the year . . . . .	1e
f Ending balance . . . . .	1f 0

2a Did the organization include an amount on Form 990, Part X, line 21? ☐ Yes ☒ No

b If "Yes," explain the arrangement in Part XIV.

**Part V Endowment Funds.** Complete if organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance . . . . .					
b Contributions . . . . .					
c Investment earnings or losses . . . . .					
d Grants or scholarships . . . . .					
e Other expenditures for facilities and programs . . . . .					
f Administrative expenses . . . . .					
g End of year balance . . . . .	0				

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %  
 b Permanent endowment ▶ \_\_\_\_\_ %  
 c Term endowment ▶ \_\_\_\_\_ %

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

	Yes	No
(i) unrelated organizations . . . . .	3a(i)	
(ii) related organizations . . . . .	3a(ii)	
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? . . . . .	3b	

4 Describe in Part XIV the intended uses of the organization's endowment funds.

**Part VI Investments—Land, Buildings, and Equipment.** See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land . . . . .	0	0		0
b Buildings . . . . .	0	0	0	0
c Leasehold improvements . . . . .	0	0	0	0
d Equipment . . . . .	0	0	0	0
e Other . . . . .	0	0	0	0
Total. Add lines 1a–1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				0

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives and other financial products . . . . .	0	
Closely-held equity interests . . . . .	0	
Other .....	0	
.....	0	
.....	0	
.....	0	
.....	0	
.....	0	
.....	0	
.....	0	
.....	0	
.....	0	
<b>Total.</b> (Column (b) should equal Form 990, Part X, col (B) line 12.) ▶	0	

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Investment in Physicians Professional Services	1,193,092	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
	0	
<b>Total.</b> (Column (b) should equal Form 990, Part X, col (B) line 13 )	1,193,092	

(a) Description	(b) Book value
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
Total. (Column (b) should equal Form 990, Part X, col. (B) line 15.) . . . . . ►	0

(a) Description of liability	(b) Amount
Federal income taxes	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
	0
<b>Total.</b> (Column (b) should equal Form 990, Part X, col (B) line 25 )	0

Schedule D (Form 990) 2008

**Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	2,331,167
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	1,646,706
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	684,461
4	Net unrealized gains (losses) on investments	4	91,353
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net). Add lines 4–8	9	91,353
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	775,814

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	454,943,000
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	452,611,833
e	Add lines 2a through 2d	2e	452,611,833
3	Subtract line 2e from line 1	3	2,331,167
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	2,331,167

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	441,002,000
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Losses reported on Form 990, Part IX, line 25	2c	
d	Other (Describe in Part XIV)	2d	439,355,294
e	Add lines 2a through 2d	2e	439,355,294
3	Subtract line 2e from line 1	3	1,646,706
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	1,646,706

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

Part XII Line 1 The entity does not have a stand alone audited financial statement, but in

Part XII Line 1 to provide consistency from the prior year Form 990, this information is

Part XII Line 1 being provided.

Part XIII Line 1 The entity does not have a stand alone audited financial statement,

Part XIII Line 1 but in order to provide consistency from the prior year Form 990, this

Part XIII Line 1 information is being provided.

Part XII Line 2D Other entities consolidated into HMFP at BIDMC.

Part XIII Line 2D Other entities consolidated into HMFP at BIDMC.

**Part XIV** Supplemental Information *(continued)*

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

For certain Officers, Directors, Trustees, Key Employees, and Highest  
Compensated Employees

- **Attach to Form 990. To be completed by organizations  
that answered "Yes" to Form 990, Part IV, line 23.**

OMB No 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

Beth Israel Deaconess Department of Medicine Foundation, Inc.

Employer identification number

04-3079630

**Part I Questions Regarding Compensation**

- 1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

- b** If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain . . . . .

- 2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a? . . . . .

- 3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input checked="" type="checkbox"/> Written employment contract                     |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input type="checkbox"/> Compensation survey or study                               |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

- 4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a:

- |  |           |   |   |
|--|-----------|---|---|
| <b>a</b> Receive a severance payment or change of control payment? . . . . .                             | <b>4a</b> |   | X |
| <b>b</b> Participate in, or receive payment from, a supplemental nonqualified retirement plan? . . . . . | <b>4b</b> | X |   |
| <b>c</b> Participate in, or receive payment from, an equity-based compensation arrangement? . . . . .    | <b>4c</b> |   | X |
- If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.

**Only 501(c)(3) and 501(c)(4) organizations must complete lines 5–8.**

- 5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- |  |           |  |   |
|--|-----------|--|---|
| <b>a</b> The organization? . . . . .         | <b>5a</b> |  | X |
| <b>b</b> Any related organization? . . . . . | <b>5b</b> |  | X |
- If "Yes" to line 5a or 5b, describe in Part III

- 6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- |  |           |   |   |
|--|-----------|---|---|
| <b>a</b> The organization? . . . . .         | <b>6a</b> |   | X |
| <b>b</b> Any related organization? . . . . . | <b>6b</b> | X |   |
- If "Yes" to line 6a or 6b, describe in Part III.

- 7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III . . . . .

- 8** Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III . . . . .

	Yes	No
<b>1b</b>		
<b>2</b>		
<b>4a</b>		X
<b>4b</b>	X	
<b>4c</b>		X
<b>5a</b>		X
<b>5b</b>		X
<b>6a</b>		X
<b>6b</b>	X	
<b>7</b>		
<b>8</b>		X

**Page 2**

**Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use Schedule J-1 if additional space is needed.

For or each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)–(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

[illegible]

**Part III Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

All Directors and Trustees serve without compensation or benefits. Compensation paid to Officers, Directors, Trustees, or Key Employees was earned for work

performed in a capacity other than that of Director or Trustee as denoted on Schedule J. No Trustee or Director devotes more than 20 hours per month to their position.

Some officers and directors of the Organization receive a non fixed payment from related parties based upon his or her individual contribution less allocable

expenses.

Reportable Compensation listed in Form 990 Part VII includes Base Compensation, Bonus/Incentive Compensation and Other Reportable Compensation as reported in Form

990 Schedule J. Other Compensation listed in Form 990 Part VII includes Deferred Compensation and Non-taxable Benefits as reported in Form 990 Schedule J.

Reportable Compensation: Amounts not otherwise separately noted in this return but quantified in Other Reportable Compensation include amounts from one or more of the following items: The employee's own contribution to a 401k Plan; the employee's own contributions to the 403b Plan; Taxable employer-subsidized parking; Taxable

Moving Expenses; Taxable Life, disability, or Long-term care insurance; and Other Taxable Retirement Benefits.

Deferred Compensation: Amounts not otherwise separately noted but quantified in deferred compensation include amounts from one or more of the following items:

Employer Contributions to 401K Retirement Plan; Employer Contributions to 403b Retirement Plan; Employer contribution to Pension Plan.

Non-taxable Benefits: Amounts not otherwise separately noted but quantified in non-taxable benefits include amounts from one or more of the following items: Employee contributions to health insurance; Employer contributions to health insurance; Employee contributions to flexible spending amounts for dependent care and/or medical

reimbursement, Group term life insurance, or disability insurance. See Schedule O for additional compensation related disclosures.

**SCHEDULE L**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Transactions With Interested Persons**

▶ Attach to Form 990 or Form 990-EZ.  
▶ To be completed by organizations that answered  
"Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c,  
or Form 990-EZ, Part V, line 38a or 40b.

OMB No 1545-0047

**2008**

**Open To Public  
Inspection**

Name of the organization

Beth Israel Deaconess Department of Medicine Foundation, Inc.

Employer identification number

04-3079630

**Part I Excess Benefit Transactions** (section 501(c)(3) and section 501(c)(4) organizations only).

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

- 2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 . . . . . ▶ \$
- 3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . . . ▶ \$

**Part II Loans to and/or From Interested Persons.**

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c) Original principal amount	(d) Balance due	(e) In default?		(f) Approved by board or committee?		(g) Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
			0	0						
			0	0						
			0	0						
			0	0						
			0	0						
			0	0						
			0	0						
Total				\$ 0						

**Part III Grants or Assistance Benefitting Interested Persons.**

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance

**Part IV Business Transactions Involving Interested Persons.**

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
Susan Freedman, MD	Family Member	0	See Schedule O		X
Patti Rosenberg	Family Member	0	See Schedule O		X
Hester Hill Schnipper	Family Member	0	See Schedule O		X
Ann Nicholson Weller	Family Member	0	See Schedule O		X
		0			
		0			

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

Beth Israel Deaconess Department of Medicine Foundation, Inc.

Employer identification number

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Form 990 Part 1 Section Summary Line 1 The mission of Beth Israel Deaconess Department of Medicine Foundation, Inc. (the Foundation) is to support medical research, provide instruction and participate in activities designed to improve the general public health of patients served by Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center (BIDMC) and their affiliates. The Foundation uses its funds to support the physician's work in the Medicine Department at BIDMC and to strengthen the department by supporting the educational requirements of the department and physicians worldwide by providing training seminars and other classes. The Foundation also uses its funds to support expenses incurred by its affiliated entities which benefit the physicians and other personnel who are engaged in activity related to the medicine field. All activities that the Foundation participates in are focused on medical procedures, research, and other activities that are inspired to enhance methods utilized in the medicine field.

Form 990 Part VI Section A Line 2 Business and Family Relationships. The following individuals have business relationships which arise from their roles as Officers and/or Directors of Beth Israel Deaconess Department of Medicine Foundation, Inc. and its affiliated entities:

Paul Levy, Stuart A. Rosenberg, MD and Mark L. Zeidel, MD

Form 990 Part VI Section A Line 6 Yes, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc. (HMFP) is the sole Member of Beth Israel Deaconess Department of Medicine Foundation, Inc. (the Foundation)

Form 990 Part VI Section A Line 7b Yes, the Member according to Foundation bylaws has the following rights:

- To approve any amendments to the Articles of Organization or bylaws;
- To approve the undertaking of any clinical services of the Foundation not being provided by the Foundation as of October 1, 2006
- To approve any action that would cause, or could reasonably be expected to cause the Member to breach the Affiliation

Agreement between the Member and Beth Israel Deaconess Medical Center;

- To select and remove and replace the independent public accounting firm;

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Beth Israel Deaconess Department of Medicine Foundation, Inc.

04-3079630

-To require the Foundation to comply with the policies and procedures of the Member's program for compliance with the applicable billing and payment requirements of federal health care programs; and

-Powers and rights as vested by law.

Form 990 Part VI Section A Line 10 The preparation and the filing of the Foundation's Form 990 and supporting schedules is the responsibility of the Chief Financial Officer (CFO) of Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center Inc. The Form 990 is prepared by the CFO's Finance group and a draft version of the Form 990 and all supporting work papers are reviewed by the Foundation's tax advisors, KPMG, LLP. During the review by the tax advisors, the CFO and his team are responsible for answering questions and providing additional information when necessary with the assistance of the Foundation's management. After the review by the tax advisors, the Form 990 and related schedules are provided to the Foundation's President for review, particularly in the areas of accuracy and adequacy of explanations and answers related to non financial information. Any issues are then addressed by the CFO and his team with the Foundation's President. There were no such issues for the Foundation's 990 preparation for this year.

The Form 990 is assembled and reviewed for final filing by the Foundation's tax advisors

Once assembled, the Foundation's President approves and signs the return.

The completed 990 Form is then filed with the proper authorities by the CFO and his team.

Form 990 Part VI Section B Line 12a-12c The Foundation had a conflict of interest policy effective for its fiscal year 2009, but is in the process of revising the policy as the Foundation is committed to pursuing charitable missions and conducting business in a responsible and ethical way. The President, Officers and Board Members will be required to report any conflicts of interest.

The Foundation has prepared a formal conflict of interest disclosure statement which will be

required to be completed annually by all key Foundation personnel. The forms were not completed in 2009.

The standards in the policy will require Foundation officers and board members shall not vote on, influence, or make recommendations regarding a transaction or decision when the individual or member of his or her family has a material interest in an entity or property involved in the transaction or decision. A material interest includes, but is

Name of the organization

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not limited to an individual or family member having a combined interest of greater than 5% of an entity or property, an individual or family member serving as a director, trustee, officer, partner, employee, consultant, agent, member of the the active professional staff, researcher or advisor of or to an entity (included by not limited to health care providers) other than Harvard Medical Faculty Physicians at BIDMC, Inc and its Affiliates, an individual holding an elected or appointed office or position in a branch of government or in a regulatory agency having authority or jurisdiction over providers of health care (for members of the judiciary, areas of conflict will be defined in the Code of Judicial Conduct) and an individual (or member of his or her family) competing with the Foundation in the purchase or sale of any property right, interest, or service.

The conflict of interest standards will require that an individual or member of his or her family not accept gifts or other favors that might lead to the inference that the gift or favor was intended to influence his or her decision-making while serving the Foundation. Per the policy, an individual should not disclose or use Foundation information for personal profit or advantage or should not disclose confidential and/or strategic information in advance of its authorized release.

As noted above, the process for addressing a potential conflict will require that the Foundation directors and officers complete a formal conflict of interest disclosure statement each year. The Foundation board will review such submitted forms and formal approval of such activities will be required to be documented in minutes of the Board meeting. If the Board feels that any individual has failed to disclose a conflict of interest, it will inform the individual of the basis for the belief and afford the individual an opportunity to explain the alleged failure to disclose. If the Board determines that the individual failed to properly disclose a conflict of interest, it shall take appropriate disciplinary and corrective actions.

With the adoption of this conflict of interest policy, the Board is determined to help ensure all transactions are handled in a fair and ethical manner.

Form 990 Part VI Section B Line 15a-15b The Foundation does not provide compensation to any individual. Certain officers and trustees of the organization receive compensation from related parties. The process of determining compensation of these individuals is conducted at the related party level where the related organization has a compensation committee that is charged with determining the compensation of its officers, directors, key employees and professional staff of the organization. The compensation committee utilizes comparative industry data, outside consultants, and other outside market data to help determine compensation. The related entities of the Foundation have formal compensation policies which are documented

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and reviewed by their Board of Directors. The compensation committee pre-approves compensation plans

which are documented in a formalized manner before being presented to employees.

Form 990 Part VI Section C Line 19 The Foundation's governing documents, its newly adopted conflict of interest policy, and its

financial statements are available to the public upon request at the offices of Harvard Medical Faculty Physicians

at Beth Israel Deaconess Medical Center, Inc. located at 375 Longwood Avenue, Boston, MA 02215.

Additionally, state and federal tax related information is provided to the general population through public websites including

www.guidestar.org and the Massachusetts Attorney General's website.

Form 990 Part VII Section A Line 1a All Foundation Directors and Trustees serve without compensation or benefits. Compensation

paid to officers, directors, trustees or key employees was earned for work performed in a capacity other

than Director or Trustee as denoted by the titles listed in Section VII. No Foundation Trustee or Director devotes more than

twenty hours per month to their position as trustee or director.

Form 990 Part XI Line 2a-2c The Beth Israel Deaconess Department of Medicine Foundation, Inc.'s financial statements

were audited on a consolidated basis as part of the audit of Harvard Medical Faculty Physicians at Beth Israel Deaconess

Medical Center Inc.'s financial statements.

Form 990 Part VII Section A The following items are additional Schedule J disclosures relating to Directors and their compensation.

CareGroup, Inc. is a participating employer in the CareGroup, Inc. Annuity Retirement Plan which, under the definitions to this Form

990 is considered a supplemental nongqualified retirement plan. Participants receive both currently taxable and deferred benefits

Form 990 Part VII Section A from this plan and additional information is included with the Explanatory Notes to Schedule J below:

Levy, Paul F.

Director (Ex-Officio) - Beth Israel Deaconess Dept. of Medicine Foundation

Director- Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

President, CEO and Director (Ex-Officio)- Beth Israel Deaconess Medical Center

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Director- Cardiovascular Management Associates, Beth Israel Anesthesia Foundation, Beth Israel Deaconess Dept of

OB/Gyn Foundation, BIH Pathology Foundation, Beth Israel Deaconess Dept. of Surgery Foundation

Trustee- Beth Israel Deaconess Hospital- Needham

Payments made by CareGroup:

Base Compensation: \$800,300

Bonus and Incentive Compensation: \$231,000

Other Reportable Compensation: \$77,678

Deferred Compensation: \$131,500

Non-Taxable Benefits: \$33,346

Deferred Compensation reported by CareGroup for the 2008 calendar year includes a bonus in the amount of \$120,000 related

to Mr. Levy's performance for the fiscal year ended September 30, 2008, but not paid to Mr. Levy until after December 31, 2008.

Other reportable and deferred compensation for Mr. Levy includes combined payments from a nonqualified retirement

plan in the amount of \$53,158.

Schnipper, M.D., Lowell E.

Treasurer- Beth Israel Deaconess Dept. of Medicine Foundation

Physician, Medical Oncology - Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Professor of Medicine- Harvard Medical School

Payments made by: Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Base Compensation: \$271,512

Bonus and Incentive Compensation: 0

Other Reportable Compensation: \$25,952

Deferred Compensation: \$31,796

Non-Taxable Benefits: \$14,697

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As required in this Form 990, compensation and benefits reported by Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center for the 2008 calendar year includes the following payments from the President and Fellows of Harvard College/Harvard Medical School related to Dr. Schnipper's positions as Physician, Medical Oncology- Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Professor of Medicine- Harvard Medical School: \$41,810 Base and Other Reportable Compensation, \$4,196 Deferred Compensation, and \$11,831 Non-taxable benefits

Zeidel, M.D. Mark L.

President and Director (Ex-Officio)- Beth Israel Deaconess Dept. of Medicine Foundation

Director Ex-Officio and Chairman of Medicine- Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Director Ex-Officio and Chief of Medicine - Beth Israel Deaconess Medical Center

Director- Cardiovascular Management Associates, Medical Care of Boston Management Corp d/b/a Affiliated Physicians Group

Professor of Medicine- Harvard Medical School

Payments made by: Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Base Compensation: \$576,079

Bonus and Incentive Compensation: \$29,091

Other Reportable Compensation: \$30,096

Deferred Compensation: \$42,508

Non-Taxable Benefits: \$20,096

As required in this Form 990, compensation and benefits reported by Beth Israel Deaconess Medical Center for the 2008 calendar year includes the following payments from the President and Fellows of Harvard College/Harvard Medical School related to Dr. Zeidel's positions as Chair of Medicine at Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Chief of Medicine at Beth Israel Deaconess Medical Center, and Professor of Medicine at Harvard Medical School: \$133,767 Base and Other Reportable Compensation, \$14,908 Deferred Compensation, and \$1,638 Non-taxable benefits

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Moellering, M.D., Robert C.

Physician, Infectious Disease- Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Former Director Ex-Officio/Former Chair, Medicine- Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center

Former Director Ex-Officio/Former Chief, Medicine- Beth Israel Deaconess Medical Center

Former President and Director- Beth Israel Deaconess Dept. of Medicine Foundation

Dr. Moellering served as President and Director at Beth Israel Deaconess Dept. of Medicine Foundation

through September 30, 2005.

All payments to Dr. Moellering relate to his current role.

Payments made by Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center:

Base Compensation: \$147,657

Bonus and Incentive Compensation: 0

Other Reportable Compensation: \$10,386

Deferred Compensation: \$18,300

Non-Taxable Benefits: \$6,866

Form Schedule L Part IV Section Col (d) As previously noted, Mark L. Zeidel, M.D., President of Beth Israel Deaconess

Department of Medicine Foundation, Inc (BIDDM) is a Director (Ex-Officio) and

Chair of Medicine at Harvard Medical Faculty Physicians at Beth Israel Deaconess

Medical Center (HMFP), Director (Ex-Officio) and Chief of Medicine at Beth

Israel Deaconess Medical Center (BIDMC), Director of Cardiovascular

Management Associates, Inc. (CVMA) and Medical Care of Boston Management

Corp. dba Affiliated Physicians Group (APG). HMFP is the sole Member of

BIDDM. Dr. Zeidel is married to Susan Freedman, MD, a physician employed by

HMFP and APG. Her salary and other income for the 2008 calendar year

included:

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Beth Israel Deaconess Department of Medicine Foundation, Inc.

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Base Compensation: \$129,500

Other Reportable Compensation: \$23,137

Contribution to Employee Benefit Plans Includes:

Deferred Compensation: \$18,000

Non-Taxable Benefits: \$180

As previously noted in this filing, Stuart A. Rosenberg, MD, Director of the Beth

Israel Deaconess Department of Medicine Foundation, Inc. (BIDDM) is the

President and CEO of Harvard Medical Faculty Physicians at Beth Israel

Deaconess Medical Center, Inc. (HMFP) and HMFP is the sole member of

BIDDM. Dr. Rosenberg also serves as President of Associated Physicians of

Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc.

and Cardiovascular Associated Physicians of Harvard Medical Faculty Physicians

at Beth Israel Deaconess Medical Center, Inc.; Director (Ex-Officio) of Beth

Israel Deaconess Medical Center (BIDMC), Cardiovascular Management

Associates, Inc., Beth Israel Dermatology Foundation, Inc., Beth Israel Deaconess

Department of Orthopaedic Surgery Foundation, Inc., Beth Israel Deaconess

Department of Surgery Foundation, Inc., Beth Israel Deaconess Department of Neonatology Foundation, Inc. and

Continuing Education Program, Inc. dba Beth Israel Deaconess Department of Psychiatry Foundation.

Dr. Rosenberg is married to Patti Rosenberg, an employee of HMFP, who provides

network development services to Cardiovascular Management Associates, Inc., a

support organization of BIDMC. Ms. Rosenberg's salary and other income for the

calendar year 2008 included:

Base Compensation: \$201,250

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Beth Israel Deaconess Department of Medicine Foundation, Inc.

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Bonus and Incentive Compensation: \$5,000

Other Reportable Compensation: \$10,845

Contribution to Employee Benefit Plans Includes:

Deferred Compensation: \$18,000

As previously noted in this filing, Lowell Schnipper, MD is the Treasurer of Beth Israel Deaconess Department of Medicine Foundation, Inc. (BIDDM) and a Physician, Medical Oncology at Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc. (HMFP) and Evelyn G. Berenson Professor of Medicine, HMS. HMFP is the sole member of BIDDM, and BIDDM is a support organization to Beth Israel Deaconess Medical Center, Inc. (BIDMC). Dr. Schnipper is married to Hester Hill Schnipper, a Licensed Social Worker providing services to BIDMC. Her salary and other income for the 2008 calendar year included:

Base Compensation: \$80,346

Other Reportable Compensation: \$9,196

Contribution to Employee Benefit Plans Includes:

Non-Taxable Benefits: \$4,264

As previously noted in this filing, Peter F. Weller, MD, the Clerk of Beth Israel Deaconess Department of Medicine Foundation, Inc. (BIDDM) is a Physician, Infectious Disease, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc. (HMFP). HMFP is the sole member of BIDDM. Dr. Weller is married to Anne Nicholson-Weller, MD. Dr. Nicholson-Weller practices internal medicine with a specialty in infectious disease and immunology and provided

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services to HMFP during the period covered by this return. Her salary and other income for the 2008 calendar year included:

Base Compensation: \$125,292

Other Reportable Compensation: \$26,699

Contribution to Employee Benefit Plans Includes:

Deferred Compensation: \$17,498

Non-Taxable Benefits: \$1,746

All Directors/Trustees serve without compensation or benefits. Compensation paid to Officers, Directors, Trustees or Key Employees was earned for work performed in a capacity other than that of Director. See Form 990 Part VII for further details.

Beth Israel Deaconess Department of Medicine Foundation, Inc. (BIDDM)

maintains an accountable business expense reimbursement plan. From time to time,

BIDDM may reimburse its officers, directors, trustees and/or key employees for

expenses they incurred and which are properly ordinary and necessary business

expenses of the reporting entity. The policies and procedures required by the

accountable business plan must be followed in order to receive reimbursement for

such expenses and it is possible that one or more individuals received non-taxable

reimbursements which totaled \$1,000 or more during the fiscal period covered by

this filing.

**SCHEDULE O****Supplemental Information to Form 990**

OMB No 1545-0047

Name of the organization

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BETH ISRAEL DEACONESS DEPARTMENT OF MEDICINE FOUNDATION, INC

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**Form Schedule R Part II Section Identification of Related Tax-Exempt Organizations Detailed primary activity for related Organizations****Associated Physicians of Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc.**

To provide emergency medical services

**Beth Israel Anaesthesia Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Department of Medicine Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Department of Neonatology Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Department of Neurology Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Department of Orthopaedic Surgery Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Department of Surgery Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Deaconess Hospital Needham Inc.**

The operation of a hospital in Needham, MA for the treatment, care and relief of sick and suffering persons

**Beth Israel Deaconess Medical Center**

The operation of a world class academic medical center in Boston, MA for the provision of exemplary patient care of sick and suffering persons, conducting "leading edge" research and supporting outstanding educational programs

**Beth Israel Deaconess Medical Center and Children's Hospital Medical Care Corporation**

The operation of an outpatient ambulatory care center in Lexington, MA

**Beth Israel Deaconess Medical Center Obstetrics and Gynecology Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Beth Israel Dermatology Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

(Continued)

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.  
(HTA)

Schedule O (Form 990) 2008

Name of the organization

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BETH ISRAEL DEACONESS DEPARTMENT OF MEDICINE FOUNDATION, INC

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**BIH Pathology Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**BIH Radiologic Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Cardiovascular Associated Physicians of Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc.**

To provide specialized cardiovascular medical services to the patients of the Cardio Vascular Institutes at Beth Israel Deaconess Medical Center and Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and others

**Cardiovascular Management Associates, Inc.**

To facilitate comprehensive cardiovascular care, education and research, within the Beth Israel Deaconess Medical Center and Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and surrounding communities

**CareGroup, Inc.**

To develop and coordinate a non-discriminatory integrated health care delivery system and to provide management services to its members.

**Continuing Education Program, Inc. d/b/a Beth Israel Deaconess Department of Psychiatry Foundation, Inc.**

To support the patient care, research and teaching missions of Beth Israel Deaconess Medical Center, Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center and Harvard Medical School

**Medical Care of Boston Management Corp. d/b/a Affiliated Physicians Group****Medical Services Organization****Mount Auburn Hospital**

The operation of a hospital in Cambridge, MA for the treatment, care and relief of sick and suffering persons

**Mount Auburn Professional Services, Inc.**

To serve Cambridge, MA and the surrounding communities by offering medical care in general and specialized practices

**New England Baptist Hospital**

The operation of an orthopedic specialty hospital in Boston, MA for the treatment, care and relief of sick and suffering persons.

**New England Baptist Medical Associates, Inc.**

To provide outpatient medical services to the various communities serviced by New England Baptist Hospital

**Harvard Medical Faculty Physicians at Beth Israel Deaconess Medical Center, Inc.**

To provide general and specialized medical services to the patients of Beth Israel Deaconess Medical Center and others

**Heart Center of Metrowest, Inc.**

To provide outpatient medical services to the metrowest communities

**President & Fellows of Harvard College**

To provide teaching and research programs in Arts and Sciences, Business, Design, Divinity, Education, Government, Law, Medicine, and Public Health

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BETH ISRAEL DEACONESS DEPARTMENT OF MEDICINE FOUNDATION, INC

04-3079630

**Riverbrook Corporation**

To hold title to property for CareGroup, Inc

**Form Schedule R Part III Section Identification of Related Organizations Taxable as Partnerships Detailed primary activity for organizations**

Beth Israel Deaconess Physician Organization, LLC - To promote quality coordinated, safe and cost effective patient care at Beth Israel Deaconess Medical Center and affiliates through integrated and coordinated managed care contracts and related medical management programs.

**Form Schedule R Part III Section Identification of Related Organizations Taxable as Partnerships Detailed direct controlling entity**

Physicians Professional Services, LLP - The organization is controlled 50% by the Beth Israel Deaconess Department of Medicine Foundation, Inc and 50% by the Beth Israel Deaconess Medical Center Obstetrics and Gynecology Foundation, Inc

**SCHEDULE R**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.  
▶ See separate instructions.

OMB No. 1545-0047

**2008**

**Open to Public  
Inspection**

Name of the organization

BETH ISRAEL DEACONESS DEPARTMENT OF MEDICINE FOUNDATION, INC.

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**Part I Identification of Disregarded Entities**

(A) Name, address, and EIN of disregarded entity	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Total income	(E) End-of-year assets	(F) Direct controlling entity
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**Part II Identification of Related Tax-Exempt Organizations**

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
Associated Physicians of Harvard Medical Faculty Physicians at BIDMC, Inc 32-0059309 375 Longwood Avenue, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Anesthesia Foundation, Inc 04-2997215 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Deaconess Department of Medicine Foundation, Inc. 04-3079630 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Deaconess Department of Neonatology Foundation, Inc 20-8253452 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Deaconess Department of Neurology Foundation, Inc 04-3030397 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Deaconess Dept of Orthopaedic Surgery Foundation, Inc 20-4974585 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Deaconess Department of Surgery Foundation, Inc 02-0671240 110 Francis Street, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.  
(HTA)

Schedule R (Form 990) 2008

**Part III Identification of Related Organizations Taxable as a Partnership**

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Predominant income (related, investment, unrelated)	(F) Share of total income	(G) Share of end-of-year assets	(H) Disproportionate allocations?		(I) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(J) General or managing partner?
							Yes	No		
CareGroup Clinical Research, LLC 30-0228711 109 Brookline Avenue, Boston, MA 02215	To participate in a clinical research partnership	MA	N/A	NONE	0	0		X	0	X
Advanced Vascular Care, LLC 26-1647880 375 Longwood Avenue, Boston, MA 02215	To provide medical support services	MA	Harvard Medical Faculty Physicians at BIDMC Inc	Related	0	0		X	0	X
Beth Israel Deaconess Physician Organization, LLC 04-3426253 110 Francis Street, Boston, MA 02215	Contract administration	MA	Harvard Medical Faculty Physicians at BIDMC Inc	Related	0	0		X	0	X
CareGroup Investment Partnership, LLP 04-3278109 109 Brookline Avenue, Boston, MA 02215	Investment Partnership	MA	Beth Israel Deaconess Medical Center	Investment	0	0		X	0	X
Physicians Professional Services, LLP 04-3275078 10 Cabot Road, Medford, MA 02155	Medical billing services	MA	See Attached Schedule O	Related	121,848	1,505,227		X	0	X

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust**

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Type of entity (C corp, S corp, or trust)	(F) Share of total income	(G) Share of end-of-year assets	(H) Percentage ownership
BIDMC-CGSMC JV, INC 26-4426847 400 Honeywell Street, Needham, MA 02494	Inactive Corporation	MA	N/A	C Corp	0	0	%
Chestnut HealthCare Alliance, Inc 04-3265117 148 Chestnut Street, Needham, MA 02492	Physician/hospital organization	MA	N/A	C Corp	0	0	%
					0	0	%
					0	0	%
					0	0	%
					0	0	%
					0	0	%
					0	0	%
					0	0	%

Part V Transactions With Related Organizations

Note. Complete line 1 if any entity is listed in Parts II, III, or IV.

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity
- b Gift, grant, or capital contribution to other organization(s)
- c Gift, grant, or capital contribution from other organization(s)
- d Loans or loan guarantees to or for other organization(s)
- e Loans or loan guarantees by other organization(s)
- f Sale of assets to other organization(s)
- g Purchase of assets from other organization(s)
- h Exchange of assets
- i Lease of facilities, equipment, or other assets to other organization(s)
- j Lease of facilities, equipment, or other assets from other organization(s)
- k Performance of services or membership or fundraising solicitations for other organization(s)
- l Performance of services or membership or fundraising solicitations by other organization(s)
- m Sharing of facilities, equipment, mailing lists, or other assets
- n Sharing of paid employees
- o Reimbursement paid to other organization for expenses
- p Reimbursement paid by other organization for expenses
- q Other transfer of cash or property to other organization(s)
- r Other transfer of cash or property from other organization(s)

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(A) Name of other organization(s)		(B) Transaction type (a-r)	(C) Amount involved
(1)			0
(2)			0
(3)			0
(4)			0
(5)			0
(6)			0



**Part II Continuation of Identification of Related Tax-Exempt Organizations**

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
Beth Israel Deaconess Hospital - Needham, Inc. 04-3229679 148 Chestnut Street, Needham, MA 02492	Hospital	MA	501(c)(3)	Line 3	Beth Israel Deaconess Medical Center, Inc.
Beth Israel Deaconess Medical Center 04-2103881 330 Brookline Avenue, Boston, MA 02215	Hospital	MA	501(c)(3)	Line 3	CareGroup, Inc.
Beth Israel Deaconess Med. Ctr. and Childrens Hospital Med. Care Corp. 04-3200113 300 Longwood Avenue, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 11, Type 1	N/A
Beth Israel Deaconess Med. Ctr. 04-2794855 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
BIH Pathology Foundation, Inc. 22-2548374 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
BIH Radiologic Foundation, Inc. 04-2571853 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Cardiovascular Associated Physicians of HMF at BIDMC, Inc. 04-3208878 185 Pilgrim Road, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Cardiovascular Management Associates, Inc. 20-8550792 185 Pilgrim Road, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 11, Type 1	Beth Israel Deaconess Medical Center, Inc.
CareGroup, Inc. 22-2629185 109 Brookline Avenue, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 11, Type III-Other	N/A
Cont. Ed. Prog. Inc. dba BID Dept of Psychiatry Foundation Inc. 04-3242952 401 Park Drive C/O of Harvard Med School, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Beth Israel Dermatology Foundation, Inc. 04-3117601 330 Brookline Avenue, Boston, MA 02215	Healthcare education	MA	501(c)(3)	Line 11, Type 1	Harvard Medical Faculty Physicians at BIDMC, Inc.
Mount Auburn Hospital 04-2103606 330 Mount Auburn Street, Cambridge, MA 02138	Hospital	MA	501(c)(3)	Line 3	CareGroup, Inc.
Mount Auburn Professional Services, Inc. 04-3026897 330 Mount Auburn Street, Cambridge, MA 02138	Medical services	MA	501(c)(3)	Line 11, Type I	Mount Auburn Hospital
New England Baptist Hospital 04-2103612 125 Parker Hill Avenue, Boston, MA 02120	Hospital	MA	501(c)(3)	Line 3	CareGroup, Inc.
New England Baptist Medical Associates, Inc. 04-3326928 125 Parker Hill Avenue, Boston, MA 02120	Medical services	MA	501(c)(3)	Line 3	New England Baptist Hospital, Inc.
President & Fellows of Harvard College 04-2103580 Massachusetts Hall, Cambridge, MA 02138	Healthcare education	MA	501(c)(3)	Line 2	N/A
Harvard Medical Faculty Physicians at BIDMC, Inc. 22-2768204 375 Longwood Avenue, Boston, MA 02215	Medical services	MA	501(c)(3)	Line 9	N/A
Heart Center of Metrowest, Inc. 03-0390670 99 Lincoln Street, Framingham, MA 01702	Medical services	MA	501(c)(3)	Line 9	Cardiovascular Management Associates, Inc.

**Part II Continuation of Identification of Related Tax-Exempt Organizations**

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
Medical Care of Boston Mgmt Corp, dba, Affiliated Physicians Group 04-2810972 400 Hunnewell Street, Needham, MA 02494	Medical services	MA	501(c)(3)	Line 9	Beth Israel Deaconess Medical Center, Inc
Riverbrook Corporation 04-2828955 109 Brookline Avenue, Boston, MA 02215	Real estate administration	MA	501(c)(2)	N/A	CareGroup, Inc
					0
					0
					0
					0
					0
					0
					0
					0

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box. ☒ **X**
  - If you are filing for an **Additional (not automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

Section 501(c) corporations required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only. ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for section 501(c) corporations required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

<b>Type or print</b> File by the due date for filing your return. See instructions.	Name of Exempt Organization		Employer identification number	
	Beth Israel Deaconess Department of Medicine Foundation, Inc.		04-3079630	
	Number, street, and room or suite no. If a P.O. box, see instructions.			
	330 Brookline Avenue, Room No. YA-419			
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.			
	Boston		MA	02215

**Check type of return to be filed (file a separate application for each return):**

- |  |   |                                    |
|--|---|------------------------------------|
| <input checked="" type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL         | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ         | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF         | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

- The books are in the care of ► Joanne Casella

Telephone No. ► (617) 667-1050

FAX No. ► (617) 667-4921

- If the organization does not have an office or place of business in the United States, check this box. ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) N/A. If this is for the whole group, check this box. ☐. If it is for part of the group, check this box. ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6 months for a section 501(c) corporation required to file Form 990-T) extension of time until 5/15/2009, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year \_\_\_\_\_ or
- ☒ tax year beginning 10/1/2007, and ending 9/30/2008.

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3 a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ 0

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box. ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

<b>Type or print</b> File by the extended due date for filing the return. See instructions.	Name of Exempt Organization		Employer identification number
	Beth Israel Deaconess Department of Medicine Foundation, Inc.		04-3079630
	Number, street, and room or suite no. If a P.O. box, see instructions.		For IRS use only
	330 Brookline Avenue, Room No. E/YA-419		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	Boston	MA	02215

**Check type of return to be filed** (File a separate application for each return):

- |  |   |                                      |                                    |
|--|---|--------------------------------------|------------------------------------|
| <input checked="" type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-PF                              | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL         | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720   | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-EZ         | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 5227   |                                    |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of ☐ Telephone No. ☐ FAX No. ☐
- If the organization does not have an office or place of business in the United States, check this box. ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) N/A. If this is for the whole group, check this box. ☐. If it is for part of the group, check this box. ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until 8/15/2010.
- 5 For calendar year 10/1/2008, or other tax year beginning 10/1/2008, and ending 9/30/2009.
- 6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension. Some of the information necessary to complete the return will not be available in time for filing a complete and accurate return by May 17, 2010.

8 a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$ 0

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☐

Title ☐

Director

Date ☐

5-13-10