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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2008

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008, or tax year beginning 12/01, 2008, and ending 11/30, 2009

G Check all that apply: Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change ☐Use the
IRS label.
Otherwise,
print
or type.
See Specific
Instructions.The Sam S. Bloom Foundation
P O Box 2413
Centennial, CO 80161-2413

A Employer identification number

84-0929690

B Telephone number (see the instructions)

(303) 771-2266

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, column (c), line 16) ☐ J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

► \$ 7,607,417.

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc., received (att sch)

2 Ck ☒ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 2,519,591.

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less: Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) See St 1

c Other prof fees (attach sch) See St 2

17 Interest

18 Taxes (attach schedule) See Stmt 3

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule) See Statement 4

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid Part XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative enter -0-)

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing ..			
	2 Savings and temporary cash investments	25,088.	17,809.	17,809.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable ..			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions) ..			
	7 Other notes and loans receivable (attach sch) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule)			
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment: basis ▶			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments – mortgage loans	665,000.	665,000.	665,000.	
13 Investments – other (attach schedule)	7,649,594.	7,497,327.	6,924,608.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	8,339,682.	8,180,136.	7,607,417.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons ..			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
FUND ASSETS OR BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ☐			
	24 Unrestricted ..			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ☒			
	27 Capital stock, trust principal, or current funds	48,379.	48,379.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	8,291,303.	8,131,757.	
	30 Total net assets or fund balances (see the instructions)	8,339,682.	8,180,136.	
31 Total liabilities and net assets/fund balances (see the instructions)	8,339,682.	8,180,136.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year– Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	8,339,682.
2 Enter amount from Part I, line 27a ..	2	-159,545.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	8,180,137.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)– Part II, column (b), line 30	6	8,180,137.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See Statement 5				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss).	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	52,178.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8	3	0.

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

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

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

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

☐ Yes☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2007	476,390.	8,617,897.	0.055279
2006	404,273.	9,730,555.	0.041547
2005	381,430.	8,378,847.	0.045523
2004	334,265.	7,648,662.	0.043702
2003	333,637.	7,367,483.	0.045285

2 Total of line 1, column (d)	2	0.231336
3 Average distribution ratio for the 5-year base period— divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.046267
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	6,723,843.
5 Multiply line 4 by line 3	5	311,092.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,632.
7 Add lines 5 and 6	7	313,724.
8 Enter qualifying distributions from Part XII, line 4	8	422,796.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948— see the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1. Date of ruling letter: _____ (attach copy of ruling letter if necessary— see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	2,632.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,632.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	2,632.
6 Credits/Payments:			
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	6a	5,962.	
b Exempt foreign organizations— tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	5,962.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,330.	
11 Enter the amount of line 10 to be Credited to 2009 estimated tax. 3,330. Refunded	11	0.	

Part VII Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) CO		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Part VII(A) Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>http://www.guidestar.org/</u>	13	X	
14	The books are in care of <u>Connie Crowley</u> Telephone no. <u>(303) 771-2266</u> Located at <u>P O Box 2413 Centennial, CO</u> ZIP + 4 <u>80161-2413</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>		N/A	N/A

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

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

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

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions). ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

N/A ☐ Yes ☐ No**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 6		58,729.	0.	1,220.

2 Compensation of five highest-paid employees (other than those included on line 1 see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

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

0

3 Five highest-paid independent contractors for professional services- (see instructions). If none, enter 'NONE.'

Part IX-A Summary of Direct Charitable Activities

Expenses

Part IX-B⁽¹⁾ Summary of Program-Related Investments (see instructions)

Amount

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,146,177.
b	Average of monthly cash balances	1b	15,060.
c	Fair market value of all other assets (see instructions)	1c	665,000.
d	Total (add lines 1a, b, and c)	1d	6,826,237.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,826,237.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	102,394.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,723,843.
6	Minimum investment return Enter 5% of line 5	6	336,192.

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

1	Minimum investment return from Part X, line 6	1	336,192.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	2,632.
b	Income tax for 2008. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,632.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	333,560.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	333,560.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	333,560.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.— total from Part I, column (d), line 26	1a	422,796.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	422,796.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	2,632.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	420,164.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				333,560.
2 Undistributed income, if any, as of the end of 2007:				
a Enter amount for 2007 only			389,470.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4: ▶ \$ 422,796.				
a Applied to 2007, but not more than line 2a.			389,470.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2008 distributable amount				33,326.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5.	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				300,234.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

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N/A

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed .

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon.

a 'Assets' alternative test – enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i).

b 'Endowment' alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c 'Support' alternative test – enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

1 Information Regarding Foundation Managers:

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

None

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

None

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

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

See Statement 7

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

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

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

See Statement for Line 2a

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year Schedule attached	None	Public	Schedule attached	389,980.
Total			3a	389,980.
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated.

(See worksheet in the instructions for line 13 to verify calculations.)

[illegible]

2008

Federal Statements

Page 1

Client 4890

The Sam S. Bloom Foundation

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Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Tax return preparation	\$ 2,360.	\$ 2,360.	\$ 2,360.	
Total	<u>\$ 2,360.</u>	<u>\$ 2,360.</u>	<u>\$ 2,360.</u>	<u>\$ 0.</u>

Statement 2
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment advisory fees	\$ 36,249.	\$ 36,249.	\$ 36,249.	
Total	<u>\$ 36,249.</u>	<u>\$ 36,249.</u>	<u>\$ 36,249.</u>	<u>\$ 0.</u>

Statement 3
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Federal excise tax (refund)	\$ -1,044.	\$ -1,044.	\$ -1,044.	
Total	<u>\$ -1,044.</u>	<u>\$ -1,044.</u>	<u>\$ -1,044.</u>	<u>\$ 0.</u>

Statement 4
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Archival storage	\$ 1,640.	\$ 820.	\$ 820.	\$ 820.
Bank Charges	218.	109.	109.	109.
Filing Fee ..	10.	5.	5.	5.
Insurance	146.	73.	73.	73.
Membership dues	995.	498.	498.	497.
Office/administration	248.	124.	124.	124.
Postage & delivery	823.	412.	412.	411.
Telephone	824.	412.	412.	412.
Total	<u>\$ 4,904.</u>	<u>\$ 2,453.</u>	<u>\$ 2,453.</u>	<u>\$ 2,451.</u>

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Statement 5
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	Mututal Fund Distributions	Purchased	Various	12/31/2009
2	922.583 Frontegra Columbus Core Fund	Purchased	Various	4/06/2009
3	47635.753 Frontegra Columbus Core Fund	Purchased	Various	7/08/2009
4	4455.193 Vanguard 500 Index Signal Fund	Purchased	Various	8/26/2009
5	5331.302 Frontegra Iron Bridge Small Cap Fund	Purchased	Various	8/28/2009
6	746.027 Dodge & Cox International Fund	Purchased	Various	8/31/2009
7	2014.147 Vanguard 500 Index Signal Fund	Purchased	Various	11/09/2009
8	1474.926 Frontegra Iron Bridge Small Cap Fund	Purchased	Various	11/09/2009
9	4901.961 New Perspective Fund	Purchased	Various	11/09/2009
10	2365.591 Dodge & Cox International Fund	Purchased	Various	11/09/2009

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
1	200,697.		0.	200,697.				\$ 200,697.
2	23,000.		28,029.	-5,029.				-5,029.
3	1462894.		1447233.	15,661.				15,661.
4	350,000.		443,363.	-93,363.				-93,363.
5	70,000.		81,963.	-11,963.				-11,963.
6	23,000.		29,317.	-6,317.				-6,317.
7	168,000.		200,246.	-32,246.				-32,246.
8	20,000.		22,676.	-2,676.				-2,676.
9	125,000.		121,626.	3,374.				3,374.
10	77,000.		92,960.	-15,960.				-15,960.
Total								\$ 52,178.

Statement 6
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
Barbara A. Bloom 49 East Mermaid Lane Philadelphia, PA 19118	President 5.00	\$ 0.	\$ 0.	\$ 239.
L. Jay Labe P. O. Box 2413 Centennial, CO 80161-2413	Vice President 0	0.	0.	0.
Edward N. Kesselman P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.

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Statement 6 (continued)
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compensation	Contribution to EBP & DC	Expense Account/ Other
A. Marvin Strait P. O. Box 2413 Centennial, CO 80161-2413	Treasurer 0	\$ 0.	\$ 0.	\$ 0.
Michael Bloom P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
William L. Bromberg P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
Tonie L. Gatch P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
Rodger A. Hara P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
Donald R. Jacobs P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
Jon Ludwigson P. O. Box 2413 Centennial, CO 80161-2413	Director 0	58,729.	0.	981.
Lee S. Mendel P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
JoAnn Radetsky P. O. Box 2413 Centennial, CO 80161-2413	Director 0	0.	0.	0.
Connie L. Crowley P. O. Box 2413 Centennial, CO 80161-2413	Foundation Mgr 27.00	0.	0.	0.
Total		\$ 58,729.	\$ 0.	\$ 1,220.

Statement 7
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:
Name: Sam S Bloom Foundation
Care Of: Connie L Crowley
Street Address: P O Box 2413

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The Sam S. Bloom Foundation

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Statement 7 (continued)
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

City, State, Zip Code:	Centennial, CO 80161-2413
Telephone:	
Form and Content:	See attached guidelines and applications procedures.
Submission Deadlines:	See attached guidelines and applications procedures.
Restrictions on Awards:	See attached guidelines and applications procedures.

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Federal Supporting Detail

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The Sam S. Bloom Foundation

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**Net Investment Income / Adj. Net Income
Other income**

Investment commission rebate

Total \$ 0.
\$ 0.**Net Investment Income / Adj. Net Income
Other income**

Investment commssion rebate

Total \$ 0.
\$ 0.**Balance Sheet
Other (Form 990-PF)[O]**

Frontegra Columbus Core Plus Fund	\$ 0.
Vanguard 500 Index Fund	2,249,109.
Frontegra Ironbridge Small Cap Fund	630,393.
New Perspectives Fund	1,701,700.
Dodge & Cox International Stock Fund	1,270,324.
Ridgeworth Corporate Bond Fund	492,330.
Pimco Total Return Fund	1,153,471.
Total	\$ 7,497,327.

**FMV of Assets (990-PF)
Other [O]**

Vanguard 500 Index Fund	\$ 1,894,401.
Frontegra Ironbridge Small Cap Fund	543,301.
New Perspectives Fund	1,740,679.
Dodge & Cox International Stock Fund	1,020,543.
Ridgeworth Corporate Bond Fund	520,891.
Pimco Total Return Fund	1,204,793.
Total	\$ 6,924,608.

PART XV-LINE 3 – Grants and Contributions Paid During the Year

ACCESS HOUSING, INC. 6978 Colorado Boulevard Commerce City, Colorado 80022	\$2,000	Designated for self-sufficiency services, excluding housing
ARAPAHOE COMMUNITY COLLEGE FOUNDATION P. O. Box 9002, 5900 South Santa Fe Drive Littleton, Colorado 80160-9002	\$2,500	Child care stipends for low-income parent-students who have children enrolled in ACC's Child Development Center
BABY BEAR HUGS 201 Main Street Yuma, Colorado 80759	\$2,400	Home visitation program serving high-risk families
BAL SWAN CHILDREN'S CENTER 1145 East 13th Avenue Broomfield, Colorado 80020	\$2,000	General operating support to provide an early childhood education experience for at-risk children
BOULDER COUNTY HOUSING CORPORATION Post Office Box 471 Boulder, Colorado 80306	\$3,000	Family Self-Sufficiency Program
BRIDGEWAY 85 S. Union Boulevard, Suite 204 Lakewood, Colorado 80228	\$3,500	General operating support for transitional shelter and program for pregnant teens
BRIGHT FUTURES P. O. Box 4216 Telluride, Colorado 81435	\$4,000	Parents as Teachers Program serving low-income and at-risk families
CATHOLIC CHARITIES AND COMMUNITY SERVICES ARCHDIOCESE OF DENVER 4045 Pecos Street Denver, Colorado 80211	\$6,000	Margery Reed Mayo Day Nursery providing services to low-income families with children age five and under
CENTER FOR WORK EDUCATION AND EMPLOYMENT 1175 Osage Street, Suite 300 Denver, Colorado 80204	\$10,000	Job readiness program for low-income Denver metro area residents—two year grant
CENTRO DE LA FAMILIA 122 E. Las Animas Colorado Springs, Colorado 80903	\$1,500	Crianza con Carino bilingual parenting education program
CEREBRAL PALSY OF COLORADO 801 Yosemite Street Denver, Colorado 80230	\$2,500	Creative Options Center for Early Education
CHILDREN'S OUTREACH PROJECT 8000 Pecos Street Denver, Colorado 80221	\$3,500	Tuition assistance for low-income children with special needs
COLORADO BRIGHT BEGINNINGS 730 Colorado Blvd., Suite 202 Denver, Colorado 80206	\$8,000	General operating support to provide services to low-income families
COLORADO HOMELESS FAMILIES P O Box 740130 Arvada, Colorado 80006	\$8,000	Supportive services excluding housing

PART XV-LINE 3 – Grants and Contributions Paid During the Year

COLORADO NONPROFIT DEVELOPMENT CENTER 4130 Tejon Street, Suite A Denver, Colorado 80211	\$3,000	Designated for Dress for Success general operating support
COLORADO STATEWIDE PARENT COALITION 7150 Hooker Street, Suite B Westminster, Colorado 80030	\$1,500	Designated for early childhood education parent trainings and workshops
COMMUNITY PARTNERSHIP FAMILY RESOURCE CENTER P. O. Box 396 Divide, Colorado 80814	\$3,500	Family Services Programs
COMMUNITY PARTNERSHIP FOR CHILD DEVELOPMENT 2330 Robinson Street Colorado Springs, Colorado 80904	\$4,000	Support for Colorado Preschool Program serving at-risk children and their families
CONGREGATION RODEF SHALOM 450 South Kearney Street Denver, Colorado 80224	\$4,400	Bloom Youth Scholarship Fund
CREEDE EARLY LEARNING CENTER P. O. Box 191 Creede, Colorado 81130	\$2,500	General operating support to provide childcare services to low-income working families
DENVER PUBLIC LIBRARY FRIENDS FOUNDATION 10 West Fourteenth Avenue Parkway Denver, Colorado 80204	\$2,000	Mi Biblioteca Mi Futuro, free educational opportunities for Denver's Hispanic population
DENVERWORKS 2828 N. Speer Blvd., Suite 103 Denver, Colorado 80211	\$2,500	Employment Ready Program and Partners for Success Mentoring
FAMILY & INTERCULTURAL RESOURCE CENTER P. O. Box 4056 Dillon, Colorado 80435	\$2,000	Designated for Families United Program
FAMILY ADVOCACY, CARE, EDUCATION, SUPPORT 3801 E. Florida Avenue, Suite 715 Denver, Colorado 80210	\$3,500	Home Visitation Program and Parenting Classes
FAMILY CONNECTS 1610 29th Avenue Place, Suite 101 Greeley, Colorado 80634	\$2,000	Early Learning Groups serving low-income families throughout Weld County
FAMILY HOMESTEAD P. O. Box 40186 Denver, Colorado 80204	\$10,000	Case management services for homeless families in Transitional Housing Program—two year grant
FAMILY STAR 2246 Federal Boulevard Denver, Colorado 80211	\$3,000	Childcare subsidies for low-income families
FAMILY TREE, INC. 3805 Marshall Street, #100 Wheat Ridge, Colorado 80033	\$3,500	Kickin' It Program provides information to and develops critical self-sufficiency skills of formerly homeless individuals and families, including youth-headed households

PART XV-LINE 3 – Grants and Contributions Paid During the Year

FAMILY VISITOR PROGRAMS P.O. Box 1845 Glenwood Springs, Colorado 81602	\$5,500	Operating support for Home Visitor Program
FOCUS POINTS FAMILY RESOURCE CENTER 3532 Franklin Street Denver, Colorado 80205	\$4,500	Early childhood education and parenting programs for low-income Spanish-speaking families
FRIENDS OF YAD SARAH 450 Park Avenue, Suite 3201 New York, New York 10022	\$880	General operating support
GREELEY TRANSITIONAL HOUSE 1206 10th Street Greeley, Colorado 80631	\$2,500	Designated for case management and supportive services
GRIFFITH CENTERS FOR CHILDREN 14142 Denver West Parkway, Suite 225 Lakewood, Colorado 80401	\$4,500	Family Preservation Program
GROWING HOME 3489 W 72nd, Suite 112 Westminster, Colorado 80030	\$3,000	Designated for case management services and parenting education
HILLTOP COMMUNITY RESOURCES, INC. 1331 Hermosa Avenue Grand Junction, Colorado 81506	\$6,000	Family First Program
INN BETWEEN OF LONGMONT, INC. 250 Kimbark Street Longmont, Colorado 80501	\$1,200	Love and Logic Parenting Classes, Life Skills and Financial Literacy
LA LLAVE FAMILY RESOURCE CENTER P. O. Box 508 Alamosa, Colorado 81101	\$5,500	Designated for family literacy and parent/child education
LA PUENTE HOME, INC. P. O. Box 1235 Alamosa, Colorado 81101	\$30,000	<i>Motivated Families Initiative:</i> Fund long-term professional Life Skills Coach to work intensively with homeless families in the Adelante Self-Sufficiency Program
LITERACY ACTION PROGRAM/GUNNISON COUNTY 225 N. Pine Street, Suite B Gunnison, Colorado 81230	\$2,500	Family Literacy Classes
LUTHERAN FAMILY SERVICES OF COLORADO 360 South Harlan Street, Suite 200 Denver, Colorado 80226-3552	\$1,000	Circle of Parents support groups in Northern Colorado
MERCY HOUSING COLORADO 1999 Broadway, Suite 1000 Denver, Colorado 80202	\$2,500	Designated for Grace Apartments' Adult Educational Programming, including life skills, parenting education, and Parenting Circles
METROPOLITAN STATE COLLEGE OF DENVER FOUNDATION P. O. Box 173362, Campus Box 14 Denver, Colorado 80217-3362	\$6,000	<i>Home Instruction Program for Parents of Preschool Youngsters and Parents as Teachers Program</i> serving public housing developments—two year grant

PART XV-LINE 3 – Grants and Contributions Paid During the Year

MI CASA RESOURCE CENTER FOR WOMEN 360 Acoma Street Denver, Colorado 80223	\$6,000	Business Development Program and Career Program
MOUNTAIN RESOURCE CENTER P. O. Box 425 Conifer, Colorado 80433	\$3,000	Early Childhood Family Education Program
NER TAMID 15318 Pomerado Road Poway, California 92064	\$13,200	Sam S. Bloom Religious School
PARENT PATHWAYS 55 South Zuni Street Denver, Colorado 80223-1208	\$30,000	<i>Motivated Families Initiative:</i> Florence Crittenton School and its comprehensive package of services designed to lift young pregnant mothers out of cycles of poverty, repeat pregnancies and dependence
PARENTING PLACE 1235-A Pine Street Boulder, Colorado 80302	\$3,500	Family Strengthening Programs
PEAK VISTA COMMUNITY HEALTH CENTERS 340 Printers Parkway Colorado Springs, Colorado 80910-3195	\$3,000	First Visitor Program serving high-risk families
PHILLIPS COUNTY FAMILY EDUCATION SERVICES P. O. Box 365 Holyoke, Colorado 80734	\$2,000	General operating support for family literacy program
PIKES PEAK COMMUNITY COLLEGE FOUNDATION 5675 South Academy Boulevard, Box C-11 Colorado Springs, Colorado 80906-5498	\$3,000	Child Care Affordability Gap Program for student-parents
PROJECT SELF-SUFFICIENCY OF LOVELAND-FT. COLLINS 375 West 37th Street, Suite 150 Loveland, Colorado 80538	\$30,000	<i>Motivated Families Initiative:</i> Support for program operations and direct services to low-income single parent families
PROJECT WISE 3401 W. 29th Avenue Denver, Colorado 80211	\$2,400	WISE Women Network Mentoring Program
ROCKY MOUNTAIN CHILDREN'S LAW CENTER 1325 S. Colorado Blvd., Suite 308 Denver, Colorado 80222	\$1,500	Prevention Partnership Program
ROCKY MOUNTAIN PARENTS AS TEACHERS 3800 S. Pierce Street Denver, Colorado 80235	\$11,000	Home visitation program for at-risk families—two year grant
SAFE SHELTER OF ST. VRAIN VALLEY P. O. Box 231 Longmont, Colorado 80502-0231	\$1,500	Case management support; Love and Logic, Living Kids and Transitional Housing Programs
SAFEHOUSE DENVER, INC. 1649 Downing Street Denver, Colorado 80218	\$5,000	Parenting Education Classes

PART XV-LINE 3 – Grants and Contributions Paid During the Year

SAFEHOUSE PROGRESSIVE ALLIANCE FOR NONVIOLENCE 835 North Street Boulder, Colorado 80304	\$2,500	Transitional Services Program
SEWALL CHILD DEVELOPMENT CENTER 1360 Vine Street Denver, Colorado 80206	\$5,500	General operating funds to provide early intervention services to preschool-aged children who are at-risk
STRIDE 5400 W. Cedar Avenue Lakewood, Colorado 80226	\$5,000	Designated for Family Self-Sufficiency Program
STRONG FAMILIES, SAFE KIDS P. O. Box 2946 Grand Junction, Colorado 81502	\$2,000	Bright Beginnings and Parenting That Works Programs
SUMMER SCHOLARS 3401 Quebec Street, Suite 5010 Denver, Colorado 80207	\$10,000	Family Literacy Program serving parents and their children under age 5—two year grant
THE ACORN SCHOOL FOR EARLY CHILDHOOD DEVELOPMENT 2580 Iris Avenue Boulder, Colorado 80304	\$2,000	Scholarship assistance for low-income families
THE DENVER FOUNDATION 55 Madison Street, Suite 800 Denver, Colorado 80206	\$20,000	Housing and Homelessness Funders Collaborative
THE FAMILY CENTER/LA FAMILIA 309 Hickory Street Fort Collins, Colorado 80524	\$4,500	Parents as Teachers Home Visitation Program
THE PIÑON PROJECT FAMILY RESOURCE CENTER P. O. Box 1510 Cortez, Colorado 81321	\$30,000	<i>Motivated Families Initiative:</i> Employment and Training Program and support services (on-site child care and family advocacy) to TANF families working toward self-sufficiency
THOMPSON VALLEY PRESCHOOL, INC. 803 E. 16th Street Loveland, Colorado 80538	\$2,000	Tuition subsidies for children from low-income families
UNITED DAY CARE CENTER 424 Pine Street, Suite 100 Fort Collins, Colorado 80524	\$3,000	Tuition assistance designated for low-income families working toward self-sufficiency
WOMEN'S BEAN PROJECT 3201 Curtis Street Denver, Colorado 80205	\$4,500	General operating support for transitional employment services for low-income women
WOMEN'S RESOURCE CENTER IN DURANGO, INC. 679 East Second Avenue, Suite 6 Durango, Colorado 81301	\$2,000	Women's Work Program
TOTAL	\$389,980	

SAM S. BLOOM FOUNDATION

GRANT GUIDELINE AND PROGRAM OVERVIEW

FORMAL GUIDELINES

The Foundation honors the memory of Sam S. Bloom.

The Foundation supports charitable organizations, qualified under the Internal Revenue Service Code section 501(c)(3), which serve financially disadvantaged residents of the State of Colorado. The Foundation offers grants for programs that provide an array of services aimed at bringing self-sufficiency to members of highly motivated at-risk populations. We welcome applications for programs providing a variety of services to family units with infants and young children.

The Foundation focuses its resources on organizations and projects that are controlled, rely primarily on financial support from, and, in turn, use resources within the State of Colorado in a financially efficient manner.

The Foundation prefers not to fund programs for research, health care, the elderly, religious education, animal welfare, or those that are primarily recreational. The Foundation will not consider requests for funding of endowments.

Applicants should apply for support by submitting the Colorado Common Grant Application. Waiver from this form of application may be granted by the Foundation Manager in the case of small organizations.

A yearly report is required for all grant recipients.

(Adopted October 3,

2005)

FREQUENTLY ASKED QUESTIONS

What are the Foundation's primary areas of interest?

The Foundation wishes to support programs designed to bring self-sufficiency to members of highly motivated at-risk populations, particularly family units with infants and young children. Areas of interest include:

- Early childhood and preschool education and development programs
- Parenting education and programs designed to enhance parent and child interaction
- Job readiness and life skills training for families and heads of household transitioning from welfare to self-sufficiency

What types of grantee organizations does the Foundation prefer?

The Foundation prefers to fund organizations and projects that are controlled in Colorado, rely primarily on Colorado financial support and offer their programs and resources to Colorado residents. The Foundation also funds organizations that are well run and are cost effective.

Continued. .

What types of financial support does the Foundation provide?

The Foundation traditionally provides general operating and program support in areas of interest. On a limited basis, the Foundation may consider start-up/seed money and capital improvement requests that closely align with its funding priorities.

What level of support can be expected from the Foundation?

The Foundation's average grant is \$2,500 - \$3,500. The grant range is \$1,000 to \$10,000.

Are multi-year grants awarded?

No. Grants are made on a yearly basis.

Are reports required?

Yes. A yearly report is required from all grant recipients. The Common Grant Report format is preferred.

What types of grant applications will not be considered by the Foundation?

- Applications from organizations that do not primarily serve financially disadvantaged Colorado residents
- Requests from organizations not qualified under Internal Revenue Code §501(c)(3)
- Applications from organizations that discriminate
- Applications for endowments, reserve funds, or debt reduction
- Medical, scientific, or academic research
- Health care programs
- Violence prevention programs
- Food distribution programs
- Care for the elderly
- Religious organizations for religious purposes
- Animal welfare or animal rights programs
- Recreational programs including wilderness adventures and summer camps
- Residential Treatment facilities for at-risk populations and substance abuse
- Multi-year funding requests
- Programs outside of Colorado

What form of grant application should be used?

The Common Grant Application format has been modified to meet the needs of the foundation's application process. Proposal submission procedures and an Application Checklist are available through the Foundation office. Only complete applications receive funding consideration.

What is the deadline for submitting a grant proposal?

Applications must be postmarked by May 1 of the current funding year.

What is the notification process?

Applicants will be notified in writing of all grant decisions. Grants are awarded in November.

Are applicants encouraged to contact the Foundation before submitting a proposal?

Yes. The Foundation welcomes the opportunity to communicate with grant seekers. The Foundation fully understands that valuable resources are typically devoted to the submission of a grant application and encourages contact with the Foundation office to determine if the work of your agency is aligned with current funding priorities.