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Form **990-PF**

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , and ending

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE LEMELSON FOUNDATION		A Employer identification number 88-0391959
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 45 SW ANKENY STREET, SUITE 200		B Telephone number 503-222-2924
	City or town, state, and ZIP code PORTLAND, OR 97204		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 320,780,264. (Part I, column (d) must be on cash basis.)		J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>			
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>			

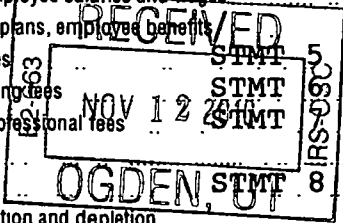
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		1,699,729.	1,544,934.		STATEMENT 2
4 Dividends and interest from securities		3,178,362.	3,278,044.		STATEMENT 3
5a Gross rents					
b Net rental income or (loss)					
5a Net gain or (loss) from sale of assets not on line 10		<9,706,716.>			STATEMENT 1
b Gross sales price for all assets on line 5a		66,926,094.			
7 Capital gain net income (from Part IV, line 2)			0.		
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 or (loss)		<3,035,023.>	<3,270,817.>		STATEMENT 4
11 Other income		<7,863,648.>	1,552,161.		
12 Total. Add lines 1 through 11					
13 Compensation of officers, directors, trustees, etc.		385,000.	38,500.		346,500.
14 Other employee salaries and wages		785,356.	0.		778,617.
15 Pension plans, employee benefits		462,996.	11,986.		453,836.
16a Legal fees		329,932.	30,731.		366,303.
b Accounting fees		76,090.	2,125.		95,964.
c Other professional fees		4,150,306.	4,096,415.		742,815.
17 Interest		12,292.	12,292.		0.
18 Taxes		544,468.	170,335.		5,561.
19 Depreciation and depletion		235,269.	0.		
20 Occupancy		121,723.	3,652.		110,703.
21 Travel, conferences, and meetings		394,064.	19,703.		393,166.
22 Printing and publications		46,347.	0.		46,131.
23 Other expenses		232,912.	10,531.		302,235.
24 Total operating and administrative expenses. Add lines 13 through 23		7,776,755.	4,396,270.		3,641,831.
25 Contributions, gifts, grants paid		7,572,248.			14,486,574.
26 Total expenses and disbursements. Add lines 24 and 25		15,349,003.	4,396,270.		18,128,405.
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements		<23212651.>			
b Net investment income (if negative, enter -0-)			0.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only.

		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	133,219.	130,576.	130,576.	
	2 Savings and temporary cash investments	4,861,500.	16,613,804.	16,613,804.	
	3 Accounts receivable				
	Less: allowance for doubtful accounts				
	4 Pledges receivable				
	Less: allowance for doubtful accounts				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable	2,816.			
	Less: allowance for doubtful accounts	56,715.	2,816.	2,816.	
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges	206,667.	222,069.	222,069.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock	STMT 11	8,098,658.	17,790,355.	17,790,355.
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment: basis				
	Less: accumulated depreciation				
	12 Investments - mortgage loans				
	13 Investments - other	STMT 12	264,941,288.	279,796,514.	279,796,514.
	14 Land, buildings, and equipment: basis	3,966,217.			
	Less: accumulated depreciation	330,099.	727,931.	3,636,118.	3,636,118.
	15 Other assets (describe)	STATEMENT 13)	2,045,825.	2,588,012.	2,588,012.
	16 Total assets (to be completed by all filers)		281,071,803.	320,780,264.	320,780,264.
	17 Accounts payable and accrued expenses		197,243.	129,398.	
	18 Grants payable		18,454,774.	11,540,447.	
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable		2,500,000.		
	22 Other liabilities (describe)	DEFERRED TAXES	145,128.	706,775.	
	23 Total liabilities (add lines 17 through 22)		18,797,145.	14,876,620.	
	24 Foundations that follow SFAS 117, check here	<input checked="" type="checkbox"/>			
	24 Unrestricted		262,274,658.	305,903,644.	
25 Temporarily restricted					
26 Permanently restricted					
27 Foundations that do not follow SFAS 117, check here	<input type="checkbox"/>				
27 Capital stock, trust principal, or current funds					
28 Paid-in or capital surplus, or land, bldg, and equipment fund					
29 Retained earnings, accumulated income, endowment, or other funds					
30 Total net assets or fund balances		262,274,658.	305,903,644.		
31 Total liabilities and net assets/fund balances		281,071,803.	320,780,264.		

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	262,274,658.
2 Enter amount from Part I, line 27a	2	<23,212,651.>
3 Other increases not included in line 2 (itemize) UNREALIZED GAIN ON INVESTMENTS	3	66,841,637.
4 Add lines 1, 2, and 3	4	305,903,644.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	305,903,644.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b FROM K-1'S FOR ALTERNATIVE INVESTMENTS	P	VARIOUS	VARIOUS
c FROM K-1'S FOR ALTERNATIVE INVESTMENTS	P	VARIOUS	VARIOUS
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 66,926,094.		67,071,868.	<145,774.>
b		18,094.	<18,094.>
c		10,094,952.	<10,094,952.>
d			
e			

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<145,774.>
b			<18,094.>
c			<10,094,952.>
d			
e			

2 Capital gain net income or (net capital loss)	2	<10,258,820.>
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). If (loss), enter -0- in Part I, line 8.	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	21,241,032.	289,056,955.	.073484
2007	15,748,830.	382,511,334.	.041172
2006	14,547,869.	362,141,368.	.040172
2005	11,354,672.	322,445,343.	.035214
2004	12,200,319.	296,231,514.	.041185

2 Total of line 1, column (d)	2	.231227
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	.046245
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	300,443,218.
5 Multiply line 4 by line 3	5	13,893,997.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	13,893,997.
8 Enter qualifying distributions from Part XII, line 4	8	21,796,861.

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 instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	0.
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	0.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	185,086.	
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	185,086.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	185,086.	
11 Enter the amount of line 10 to be. Credited to 2010 estimated tax	11	185,086.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.		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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a 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?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> NV, OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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?	13	X	

Website address ► **WWW.LEMELSON.ORG**

14 The books are in care of ► **PHILIP J. VARNUM** Telephone no. ► **503-222-2924**
 Located at ► **45 SW ANKENY STREET, SUITE 200, PORTLAND, OR** ZIP+4 ► **97204**

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 ☐ 15 N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	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 2009?	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years: _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here: _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 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 2009.) N/A	3b	
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 2009?	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)?

☒ 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

☐

5b

X

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).

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

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870.

6b

X

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		385,000.	90,556.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JILL TUCKER - 45 SW ANKENY STREET, SUITE 200, PORTLAND, OR 97204	SENIOR PROGRAM OFFICER 40.00	121,400.	33,340.	0.
MARGARET REID - 45 SW ANKENY STREET, SUITE 200, PORTLAND, OR 97204	PROGRAM DIRECTOR 40.00	116,885.	37,852.	0.
PATRICK MALONEY - 45 SW ANKENY STREET, SUITE 200, PORTLAND, OR	SENIOR PROGRAM OFFICER 40.00	111,000.	37,836.	0.
ABIGAIL SARMA - 45 SW ANKENY STREET, SUITE 200, PORTLAND, OR	PROGRAM OFFICER 40.00	62,404.	26,875.	0.
CLAUDIA JIMENEZ - 45 SW ANKENY STREET, SUITE 200, PORTLAND, OR	ACCOUNTANT 40.00	63,000.	17,486.	0.

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

5

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET, BOSTON, MA 02110	INVESTMENT CONSULTING	562,319.
QUARLES & BRADY LLP - 300 N. LASALLE STREET, SUITE 4000, CHICAGO, IL 60654	LEGAL SERVICES	310,566.
JIBE CONSULTING, INC - 2501 SW FIRST AVENUE, SUITE 300, PORTLAND, OR 97201	FINANCIAL SYSTEM CONSULTING	109,796.
BRANDYWINE TRUST COMPANY 7234 LANCASTER PIKE, HOCKESSIN, DE 19707	INVESTMENT MANAGEMENT	94,947.
THREE HUMANS, INC - 221 E. 78TH STREET, SUITE 3F, NEW YORK, NY 10075	VIDEO PRODUCTION SERVICES	90,106.
Total number of others receiving over \$50,000 for professional services		6

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 SEE STATEMENT 17	45,647.
2 SEE STATEMENT 18	31,045.
3 SEE STATEMENT 19	18,556.
4 SEE STATEMENT 20	23,026.

Part IX-B Summary of Program-Related Investments

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

	Amount
1 SEE STATEMENT 21	200,000.
2 SEE STATEMENT 22	125,000.
3 All other program-related investments. See instructions. SEE STATEMENT 16	200,000.
Total. Add lines 1 through 3	525,000.

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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	13,434,460.
b	Average of monthly cash balances	1b	11,491,621.
c	Fair market value of all other assets	1c	280,092,414.
d	Total (add lines 1a, b, and c)	1d	305,018,495.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	SEE STATEMENT 23 413,344.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	305,018,495.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,575,277.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	300,443,218.
6	Minimum investment return. Enter 5% of line 5	6	15,022,161.

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	15,022,161.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	15,022,161.
4	Recoveries of amounts treated as qualifying distributions	4	109,577.
5	Add lines 3 and 4	5	15,131,738.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	15,131,738.

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	18,128,405.
b	Program-related investments - total from Part IX-B	1b	525,000.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	3,143,456.
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	21,796,861.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	21,796,861.

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.

Form 990-PF (2009)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				15,131,738.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			9,554,661.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4. \blacktriangleright \$ 21,796,861.				
a Applied to 2008, but not more than line 2a			9,554,661.	
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 2009 distributable amount				12,242,200.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (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 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				2,889,538.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XV **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 SEE ATTACHED STATEMENT(S)				14,486,574.
Total			▶ 3a	14,486,574.
b Approved for future payment SEE ATTACHED STATEMENT(S)				4849741.
Total			▶ 3b	4849741.

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

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Sign Here

Signature of officer or trustee Wendy Lencz

Date _____

Title

President

**Paid
Preparer's
Use Only**

Preparer's
signature

Firm's name (or yours if self-employed),
address, and ZIP code

MOSS ADAMS LLP
805 SW BROADWAY, #1200
PORTLAND, OREGON 97205

Date _____

Date 11/8/10

☐ Check if self-employed

Preparer's identifying number

EIN ▶

Phone no. (503) 242-1447

Form **990-PF** (2009)

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
PUBLICLY TRADED SECURITIES		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
66,926,094.	66,926,094.	0.	0.	0.			

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
FROM K-1'S FOR ALTERNATIVE INVESTMENTS		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
0.	18,094.	0.	0.	<18,094.>			

(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED		DATE ACQUIRED		DATE SOLD	
FROM K-1'S FOR ALTERNATIVE INVESTMENTS		PURCHASED		VARIOUS		VARIOUS	
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS			
0.	9,688,622.	0.	0.	<9,688,622.>			

CAPITAL GAINS DIVIDENDS FROM PART IV 0.

TOTAL TO FORM 990-PF, PART I, LINE 6A <9,706,716.>

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	AMOUNT
ALTERNATIVE INV. AND MANAGED A/C INTEREST	1,696,725.
ALTERNATIVE INVESTMENT UBI INTEREST	3,004.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1,699,729.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ALTERNATIVE INV. AND MANAGED A/C DIVIDENDS	3,177,881.	0.	3,177,881.
ALTERNATIVE INV. UBI DIVIDENDS	481.	0.	481.
TOTAL TO FM 990-PF, PART I, LN 4	3,178,362.	0.	3,178,362.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ADVISORY RESEARCH SMALL CAP VALUE EQUITY FUND, LP	<42,304.>	<42,304.>	
ADVISORY RESEARCH SMALL CAP VALUE EQUITY FUND, LP	42,304.	0.	
AEW GLOBAL PROPERTY SECURITIES FUND,LP	760,515.	760,515.	
AEW GLOBAL PROPERTY SECURITIES FUND,LP	51,182.	0.	
AXIOM INTERNATIONAL EQUITY FUND II	<8,236.>	<8,236.>	
AXIOM INTERNATIONAL EQUITY FUND II	<23,958.>	0.	
BRANDYWINE PRIVATE EQUITY PARTNERS 2005,LP	<162,026.>	<162,026.>	
BRANDYWINE PRIVATE EQUITY PARTNERS 2005,LP	150,804.	0.	
BRANDYWINE PRIVATE EQUITY PARTNERS 2005,LP	773.	0.	
BRANDYWINE PRIVATE EQUITY PARTNERS 2006,LP	<35,516.>	<35,516.>	
BRANDYWINE PRIVATE EQUITY PARTNERS 2006,LP	82,314.	0.	

BRANDYWINE PRIVATE EQUITY PARTNERS 2006, LP	<1,762.>	0.
BRANDYWINE PRIVATE EQUITY PARTNERS 2007, LP	<46,420.>	<46,420.>
BRANDYWINE PRIVATE EQUITY PARTNERS 2007, LP	49,050.	0.
BRANDYWINE PRIVATE EQUITY PARTNERS 2008, LP	<49,441.>	<49,441.>
BRANDYWINE PRIVATE EQUITY PARTNERS 2008, LP	48,118.	0.
BROOKSIDE CAPITAL PARTNERS, LP	11,072.	11,072.
BROOKSIDE CAPITAL PARTNERS, LP	<231.>	0.
BROOKSIDE CAPITAL PARTNERS, LP	13,111.	0.
CEDAR ROCK CAPITAL PARTNERS, LLC	<87,495.>	<87,495.>
CEDAR ROCK CAPITAL PARTNERS, LLC	71,318.	0.
COLCHESTER GLOBAL BOND FUND	<2,703,928.>	<2,703,928.>
COMMONFUND CAPITAL INT'L PTRS III, LP	<90,993.>	<90,993.>
COMMONFUND CAPITAL INT'L PTRS III, LP	100,878.	0.
COMMONFUND CAPITAL INT'L PTRS IV, LP	<54,565.>	<54,565.>
COMMONFUND CAPITAL INT'L PTRS IV, LP	34,802.	0.
COMMONFUND CAPITAL INT'L PTRS V, LP	<135,647.>	<135,647.>
COMMONFUND CAPITAL INT'L PTRS V, LP	84,445.	0.
COMMONFUND CAPITAL INT'L PTRS VI, LP	<36,655.>	<36,655.>
COMMONFUND CAPITAL INT'L PTRS VI, LP	<7,479.>	0.
FARALLON CAPITAL INSTITUTIONAL PARTNERS, LP	<989,946.>	0.
FRONTIER SMALL CAPITAL FUND LP	<33,424.>	<33,424.>
FRONTIER SMALL CAPITAL FUND LP	33,424.	0.
GENERATION IM GLOBAL EQUITY FUND, LLC	<48,843.>	<48,843.>
GENERATION IM GLOBAL EQUITY FUND, LLC	6,024.	0.
LMERF	181,315.	0.
LMERF--SEE ATTACHED FOOTNOTE	<181,315.>	<181,315.>
LONE CASCADE, LP	<45,614.>	<45,614.>
LONE CASCADE, LP	45,488.	0.
LONE JUNIPER, LP	<208,929.>	<208,929.>
LONE JUNIPER, LP	207,657.	0.
LONE JUNIPER, LP	<3,268.>	0.
LYME FOREST FUND, LP	27,834.	27,834.
LYME FOREST FUND, LP	<46,089.>	0.
LYME FOREST FUND, LP	<5,320.>	0.
VENTURE INVESTMENT ASSOCIATES IV, LP	36,383.	0.
VENTURE INVESTMENT ASSOCIATES IV, LP	<16,095.>	0.
VENTURE INVESTMENT ASSOCIATES V, LP	<159,484.>	<159,484.>
VENTURE INVESTMENT ASSOCIATES V, LP	55,050.	0.

VENTURE INVESTMENT ASSOCIATES V, LP	<23,903.>	0.
VENTURE INVESTMENT ASSOCIATES VI, LP	<81,534.>	<81,534.>
VENTURE INVESTMENT ASSOCIATES VI, LP	121,458.	0.
VENTURE INVESTMENT ASSOCIATES VI, LP	2,709.	0.
WTC-CTF RESEARCH EQUITY PORTFOLIO	<2,289.>	<2,289.>
WTC-CTF RESEARCH EQUITY PORTFOLIO	<48,430.>	0.
FARALLON CAPITAL INSTITUTIONAL PARTNERS, LP	313,019.	313,019.
DAVIDSON KEMPNER INSTITUTIONAL PARTNERS, LP	<26,913.>	<26,913.>
DAVIDSON KEMPNER INSTITUTIONAL PARTNERS, LP	<73,495.>	0.
ROCKPORT CAPITAL PARTNERS III, LP	<73,291.>	<73,291.>
ROCKPORT CAPITAL PARTNERS III, LP	73,588.	0.
SEMPER VIC PARTNERS, LP	<81,057.>	<81,057.>
SEMPER VIC PARTNERS, LP	69,785.	0.
SILCHESTER INTERNATIONAL INVESTORS, LP	120,310.	120,310.
SILCHESTER INTERNATIONAL INVESTORS, LP	<37,968.>	0.
BRANDYWINE PRIVATE EQUITY PARTNERS 2007, LP	<3,273.>	0.
BRANDYWINE PRIVATE EQUITY PARTNERS 2008, LP	<1,523.>	0.
VENTURE INVESTMENT ASSOCIATES IV, LP	<130,977.>	<130,977.>
BRANDYWINE PRIVATE EQUITY PARTNERS 2009, LP	<6,055.>	<6,055.>
BRANDYWINE PRIVATE EQUITY PARTNERS 2009, LP	5,985.	0.
ADAGE CAPITAL PARTNERS, LP	3,197.	3,197.
ADAGE CAPITAL PARTNERS, LP	<174,454.>	0.
MISCELLANEOUS INCOME	26,187.	26,187.
MISCELLANEOUS INCOME	15,446.	0.
REFUND OF PRIOR YEAR GRANTS	109,577.	0.

TOTAL TO FORM 990-PF, PART I, LINE 11	<3,035,023.>	<3,270,817.>
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FORM 990-PF

LEGAL FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
QUARLES & BRADY, LLP	310,566.	30,731.		346,937.
JONES VARGAS	175.	0.		175.
KOCHHAR & CO.	15,515.	0.		15,515.
GARVEY SCHUBERT BARER	3,676.	0.		3,676.
TO FM 990-PF, PG 1, LN 16A	329,932.	30,731.		366,303.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MOSS ADAMS LLP	68,169.	2,125.		85,544.
CLARK NUBER PS	4,109.	0.		6,608.
BUPATHY & COMPANY	3,812.	0.		3,812.
TO FORM 990-PF, PG 1, LN 16B	76,090.	2,125.		95,964.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY COMMITTEE				
STIPENDS - INTERNATIONAL	20,000.	0.		20,000.
APPRAISALS	8,033.	0.		8,033.
BRANDYWINE TRUST COMPANY	94,947.	94,947.		0.
COMMUNICATIONS	330,536.	0.		337,933.
INVESTMENT MANAGEMENT FEES				
- ALTERNATIVE INVESTMENTS	2,702,365.	3,371,517.		0.
OTHER PROFESSIONAL FEES	9,539.	0.		2,039.
CAMBRIDGE ASSOCIATES, LLC	562,319.	562,319.		0.
CONSULTING FEES -				
FINANCIAL SYSTEM	52,564.	0.		73,844.
INVESTMENT MANAGEMENT FEES				
- MANAGED ACCOUNTS	67,632.	67,632.		0.
INTERNATIONAL LIASION				
OFFICES	131,547.	0.		131,547.

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IT SUPPORT	104,653.	0.	103,248.
PROGRAM CONSULTANT FEES	66,171.	0.	66,171.
TO FORM 990-PF, PG 1, LN 16C	4,150,306.	4,096,415.	742,815.

FORM 990-PF TAXES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX--CURRENT AND DEFERRED	538,907.	0.		0.
FOREIGN TAX PAID	0.	170,335.		0.
INDIA TDS TAX	5,561.	0.		5,561.
TO FORM 990-PF, PG 1, LN 18	544,468.	170,335.		5,561.

FORM 990-PF OTHER EXPENSES STATEMENT 9

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	6,390.	6,390.		0.
EMPLOYEE SEARCH	47,078.	0.		47,078.
INSURANCE	12,564.	377.		12,187.
MEALS AND ENTERTAINMENT	9,622.	0.		7,714.
MISCELLANEOUS EXPENSES	30,323.	0.		38,589.
OFFICE EXPENSE	125,464.	3,764.		195,196.
TEMPORARY ADMINISTRATIVE ASSISTANCE	271.	0.		271.
STATE CHARITABLE ACTIVITIES FEE	1,200.	0.		1,200.
TO FORM 990-PF, PG 1, LN 23	232,912.	10,531.		302,235.

FOOTNOTES

STATEMENT 10

PART VII-A - LINE 11

THE FOUNDATION OWNS A 50.99% CLASS A LIMITED PARTNERSHIP INTEREST IN THE LEMELSON MEDICAL, EDUCATION & RESEARCH FOUNDATION, L.P., A CLOSELY HELD LIMITED PARTNERSHIP (EIN: 88-0305280). THROUGHOUT FORM 990-PF AND THE SUPPORTING SCHEDULES AND ATTACHMENTS, THE LEMELSON MEDICAL, EDUCATION & RESEARCH FOUNDATION, L.P. IS ABBREVIATED AS "LMERF".

THE FOUNDATION MADE NO PAYMENTS TO LMERF DURING THE YEAR,
AND THE ONLY PAYMENTS RECEIVED BY THE FOUNDATION FROM LMERF
WERE PARTNERSHIP DISTRIBUTIONS.

STATEMENT 10B: PART VIII - LIST OF OFFICERS, DIRECTORS,
TRUSTEES AND FOUNDATION MANAGERS

ADDENDUM TO STATEMENT 15:

NAME	TITLE
DOROTHY LEMELSON	CHAIR OF THE BOARD, PRESIDENT, AND DIRECTOR
ERIC LEMELSON	TREASURER, VICE PRESIDENT, ASSISTANT SECRETARY, AND DIRECTOR
ROBERT LEMELSON	SECRETARY, VICE PRESIDENT, ASSISTANT TREASURER, AND DIRECTOR
JULIA NOVY-HILDESLEY	EXECUTIVE DIRECTOR AND ASSISTANT SECRETARY
PHILIP J. VARNUM	CHIEF FINANCIAL AND ADMINISTRATIVE OFFICER AND ASSISTANT TREASURER

THE LEMELSON FOUNDATION PURCHASES DIRECTORS AND OFFICERS' LIABILITY INSURANCE THAT PROVIDES COVERAGE TO BOTH THE FOUNDATION AND ITS DIRECTORS AND OFFICERS. WHILE A PORTION OF THE PREMIUM MAY BE REGARDED AS COMPENSATION TO DIRECTORS AND OFFICERS, THE COMPENSATORY PORTION ALLOCABLE TO ANY ONE INDIVIDUAL IS DE MINIMIS.

STATEMENT 10C: PART X - MINIMUM INVESTMENT RETURN

THE FOUNDATION OWNED A 50.99% CLASS A LIMITED PARTNERSHIP INTEREST IN THE LEMELSON MEDICAL, EDUCATION & RESEARCH FOUNDATION, L.P., A CLOSELY HELD LIMITED PARTNERSHIP, THROUGHOUT THE YEAR. THE FAIR MARKET VALUE OF THE PARTNERSHIP INTEREST INCLUDED IN LINE 1C IS BASED ON AN APPRAISAL BY COGENT VALUATION AS OF DECEMBER 31, 2008. THERE WAS NO MATERIAL CHANGE DURING 2009, AND THE FOUNDATION BELIEVES THE ANALYSIS IN THE APPRAISAL WAS APPROPRIATE AS OF DECEMBER 31, 2009, AS WELL.

THE NET ASSET VALUE OF THE TOTAL CLASS A INTERESTS AS OF DECEMBER 31, 2008, WAS DETERMINED BY THE APPRAISERS TO BE \$2,762,000. THE APPRAISERS DETERMINED THAT A 7 PERCENT DISCOUNT FOR LACK OF CONTROL AND A 24 PERCENT DISCOUNT FOR LACK OF MARKETABILITY, APPLIED SEQUENTIALLY, WERE APPROPRIATE IN DETERMINING THE FAIR MARKET VALUE OF THE CLASS A LIMITED PARTNERSHIP INTERESTS.

THE DISCOUNT FOR LACK OF CONTROL REFLECTS THE DIMINUTION IN VALUE RESULTING FROM THE FOUNDATION'S LACK OF ABILITY TO CONTROL THE PARTNERSHIP ACTIVITIES. THE DISCOUNT FOR LACK OF MARKETABILITY REFLECTS THE DIMINUTION IN VALUE RESULTING FROM THE LIMITED LIQUIDITY OF CLOSELY HELD SECURITIES.

WITHOUT THESE DISCOUNTS, THE NET ASSET VALUE ATTRIBUTABLE TO THE FOUNDATION'S LIMITED PARTNERSHIP INTEREST WOULD HAVE BEEN \$1,408,344. THE DISCOUNT ATTRIBUTABLE TO THE FOUNDATION'S INTEREST IS \$413,344, RESULTING IN THE FAIR MARKET VALUE OF \$995,000 INCLUDED IN LINE 1C.

FORM 990-PF	CORPORATE STOCK	STATEMENT 11
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CAPITAL INTERNATIONAL EMERGING MARKETS	17,788,355.	17,788,355.
LYME FOREST FUND, INC.	2,000.	2,000.
TOTAL TO FORM 990-PF, PART II, LINE 10B	17,790,355.	17,790,355.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	12
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ADAGE CAPITAL PARTNERS	FMV	20,301,473.	20,301,473
ADVISORY RESEARCH VALUE EQUITY FUND LP	FMV	3,351,429.	3,351,429.
AEW GLOBAL PROPERTIES SECURITIES FUND	FMV	15,174,703.	15,174,703.
AXIOM INTERNATIONAL EQUITY FUND II	FMV	12,669,367.	12,669,367.
BRANDYWINE CASH RESERVES	FMV	699,100.	699,100.
BRANDYWINE PRIVATE EQUITY PARTNERS 2005	FMV	8,855,696.	8,855,696.
BRANDYWINE PRIVATE EQUITY PARTNERS 2006	FMV	2,404,345.	2,404,345.
BRANDYWINE PRIVATE EQUITY PARTNERS 2007	FMV	896,816.	896,816.
BRANDYWINE PRIVATE EQUITY PARTNERS 2008	FMV	387,651.	387,651.
BROOKSIDE CAPITAL PARTNERS LP	FMV	14,605,006.	14,605,006.
CEDAR ROCK CAPITAL PARTNERS LLP	FMV	9,796,334.	9,796,334.
CLIMATE SOLUTIONS	FMV	491,234.	491,234.
COLCHESTER GLOBAL BOND FUND	FMV	18,371,995.	18,371,995.
COMMONFUND CAPITAL INT'L PTRS III	FMV	3,378,354.	3,378,354.
COMMONFUND CAPITAL INT'L PTRS IV	FMV	2,109,658.	2,109,658.
COMMONFUND CAPITAL INT'L PTRS V	FMV	1,731,242.	1,731,242.
COMMONFUND CAPITAL INT'L PTRS VI	FMV	674,278.	674,278.
FARALLON CAPITAL INSTITUTIONAL PTRS LP	FMV	18,787,839.	18,787,839.
FRONTIER SMALL CAP FUND, LP	FMV	4,043,560.	4,043,560.
GENERATION IM GLOBAL EQUITY FUND	FMV	1,983,752.	1,983,752.
LONE CASCADE, LP	FMV	5,671,932.	5,671,932.
LONE JUNIPER, LP	FMV	11,189,550.	11,189,550.
LYME FOREST FUND LP	FMV	1,334,152.	1,334,152.
MASON CAPITAL	FMV	7,471,097.	7,471,097.
MAYO INVESTMENT ADVISORS	FMV	8,175,216.	8,175,216.
NORTH RIVER	FMV	8,367,372.	8,367,372.
ROCKPORT CAPITAL PARTNERS III, LP	FMV	624,177.	624,177.

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SATELLITE OVERSEAS CLASS A	FMV	778,145.	778,145.
SATELLITE OVERSEAS CLASS B	FMV	2,388,415.	2,388,415.
SEMPER VIC PARTNERS, LP	FMV	9,190,230.	9,190,230.
SILCHESTER INTERNATIONAL INVESTORS, LP	FMV	22,294,015.	22,294,015.
SMITH BREEDEN BOND FUND	FMV	0.	0.
SPINDRIFT	FMV	1,317,341.	1,317,341.
STINSON CAPITAL PARTNERS, LP	FMV	0.	0.
VENTURE INVESTMENT ASSOCIATES IV LP	FMV	5,385,969.	5,385,969.
VENTURE INVESTMENT ASSOCIATES V	FMV	4,509,100.	4,509,100.
VENTURE INVESTMENT ASSOCIATES VI	FMV	1,302,052.	1,302,052.
WELLINGTON RESEARCH EQUITY	FMV	7,355,301.	7,355,301.
BRANDYWINE PRIVATE EQUITY PARTNERS 2009		62,119.	62,119.
DAVIDSON KEMPNER INSTITUTIONAL PARTNERS, LP	FMV	8,943,226.	8,943,226.
IR&M	FMV	10,391,356.	10,391,356.
IR&M CREDIT STRATEGY	FMV	5,623,456.	5,623,456.
PIMCO FUNDS	FMV	16,708,461.	16,708,461.
TOTAL TO FORM 990-PF, PART II, LINE 13		279,796,514.	279,796,514.

FORM 990-PF	OTHER ASSETS		STATEMENT 13
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
EMERGENCE BIO-ENERGY NOTE - PROGRAM RELATED	100,825.	115,949.	115,949.
E&CO., INC. NOTE - PROGRAM RELATED	200,000.	400,000.	400,000.
ROOT CAPITAL NOTE - PROGRAM RELATED	300,000.	300,000.	300,000.
RSF NOTE - SOCIAL INVESTMENT FUND - PROGRAM RELATED	100,000.	102,063.	102,063.
SELCO EQUITY - PROGRAM RELATED	350,000.	350,000.	350,000.
LIMITED PARTNERSHIP INTEREST IN LMERF	995,000.	995,000.	995,000.
CALVERT SOLAR LANTERNS - PROGRAM RELATED	0.	100,000.	100,000.
SELCO NOTE - PROGRAM RELATED	0.	125,000.	125,000.
CONVERSION SOUND EQUITY - PROGRAM RELATED	0.	100,000.	100,000.
TO FORM 990-PF, PART II, LINE 15	2,045,825.	2,588,012.	2,588,012.

FORM 990-PF

OTHER NOTES AND LOANS PAYABLE

STATEMENT 14

LENDER'S NAME	TERMS OF REPAYMENT	SECURITY PROVIDED BY BORROWER
THE NORTHERN TRUST COMPANY	BORROWER MAY BORROW, REPAY AND REBORROW UNTIL MATURITY DATE	N/A

DATE OF NOTE	MATURITY DATE	ORIGINAL LOAN AMOUNT	INTEREST RATE	PURPOSE OF LOAN
09/29/09	09/28/10	2,500,000.	3.00%	PURCHASE OF OFFICE CONDO

RELATIONSHIP OF LENDER

NONE

DESCRIPTION OF CONSIDERATION	FMV OF CONSIDERATION	BALANCE DUE
NONE	0.	2,500,000.

TOTAL TO FORM 990-PF, PART II, LINE 21, COLUMN B

2,500,000.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 15
TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DOROTHY LEMELSON 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	SEE STATEMENT 10B 6.00	0.	0.	0.
ERIC LEMELSON 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	SEE STATEMENT 10B 3.00	0.	0.	0.
ROBERT LEMELSON 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	SEE STATEMENT 10B 3.00	0.	0.	0.
SUSAN MORSE 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	DIRECTOR 3.00	0.	0.	0.
JENNIFER BRUML 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	DIRECTOR 3.00	0.	0.	0.
JULIA NOVY-HILDESLEY 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	SEE STATEMENT 10B 40.00	255,000.	58,711.	0.
PHILIP VARNUM 45 SW ANKENY STREET, SUITE 200 PORTLAND, OR 97204	SEE STATEMENT 10B 40.00	130,000.	31,845.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		385,000.	90,556.	0.

FORM 990-PF	OTHER PROGRAM-RELATED INVESTMENTS	STATEMENT 16
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DESCRIPTION	AMOUNT
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THE FOUNDATION PROVIDED AN EQUITY PRI TO CONVERSION SOUND LLC, A DELAWARE LIMITED LIABILITY COMPANY WITH A SOCIAL MISSION TO DEVELOP A COMBINATION OF TECHNOLOGIES AND UNCONVENTIONAL DISTRIBUTION CHANNELS FOR THE PROVISION OF AFFORDABLE HEARING AIDS. A PAYMENT OF \$100,000 WAS PAID BY	100,000.
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DESCRIPTION	AMOUNT
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THE FOUNDATION TO CONVERSION SOUND LLC ON JULY 1, 2009.	0.
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DESCRIPTION	AMOUNT
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THE FOUNDATION PROVIDED A PRI LOAN OF \$100,000 TO FINANCE INVENTORY FOR D.LIGHT DESIGN, A FOR-PROFIT COMPANY MANUFACTURING LED LIGHTS TO REPLACE KEROSENE LANTERNS. THE LOAN WAS MADE TO CALVERT SOCIAL INVESTMENT FOUNDATION, AN EXPERIENCED LENDER TO SOCIAL ENTERPRISES TO SERVE AS "FIRST	100,000.
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DESCRIPTION	AMOUNT
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LOSS CAPITAL." THIS CAPITAL WILL BE LEVERAGED TO PROVIDE D.LIGHT WITH A \$200,000 LINE OF CREDIT THAT D.LIGHT WILL USE TO FINANCE INVENTORY FOR ORDERS RECEIVED. A PAYMENT OF \$100,000 WAS PAID BY THE FOUNDATION TO CALVERT SOCIAL INVESTMENT FOUNDATION ON OCTOBER 8, 2009.	0.
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TOTAL TO FORM 990-PF, PART IX-B, LINE 3	200,000.
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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 17
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ACTIVITY ONE

STUDY TOUR OF THE LEMELSON RECOGNITION AND MENTORING PROGRAM (RAMP) TEAMS TO INDONESIA. THE PURPOSE OF THE STUDY TOUR IS TO DISCUSS KEY CHALLENGES AND CASES FACED BY RAMPS IN INDIA, INDONESIA AND PERU, AND TO FACILITATE LEARNING BY SHARING THESE EXPERIENCES ACROSS ALL RAMPS.

TO FORM 990-PF, PART IX-A, LINE 1

EXPENSES

45,647.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	18
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ACTIVITY TWO

WORKING GROUP OF THE LEMELSON FOUNDATION RECOGNITION AND MENTORING PROGRAM (RAMP) TEAMS TO BOSTON. THE PURPOSE OF THIS MEETING IS TO ALLOW ALL RAMPS TO EXCHANGE AND LEARN FROM EACH OTHER ON MATTERS OF MONITORING, EVALUATION AND LEARNING FROM THEIR INCUBATION AND ECOSYSTEM DEVELOPMENT PROGRAMS.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

31,045.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	19
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ACTIVITY THREE

WORKING GROUP OF THE LEMELSON FOUNDATION RECOGNITION AND MENTORING PROGRAM (RAMP) TEAMS TO INDIA. THE PURPOSE OF THIS MEETING IS TO ALLOW ALL RAMPS TO EXCHANGE AND LEARN FROM EACH OTHER ON FUNDRAISING AND OTHER EFFORTS FOR ENSURING FINANCIAL AND PROGRAM SUSTAINABILITY.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 3

18,556.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	20
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ACTIVITY FOUR

WORKING GROUP OF THE LEMELSON FOUNDATION RECOGNITION AND MENTORING PROGRAM (RAMP) TEAMS TO INDONESIA. THE PURPOSE OF THIS MEETING IS TO ENABLE ALL RAMPS TO EXCHANGE AND LEARN FROM EACH OTHER ON HOW TO BEST ENGAGE STUDENTS IN INVENTION, INNOVATION AND ENTREPRENEURSHIP.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 4

23,026.

FORM 990-PF	SUMMARY OF PROGRAM-RELATED INVESTMENTS	STATEMENT 21
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DESCRIPTION

THE FOUNDATION IS LENDING FUNDS AT A BELOW MARKET INTEREST RATE TO E+CO, AN ENERGY INVESTMENT INTERMEDIARY, TO MAKE LOANS TO SMALL TO MEDIUM ENTERPRISES IN ORDER TO DISSEMINATE SOLAR ENERGY SYSTEMS TO RURAL POOR PEOPLE IN TANZANIA. A PAYMENT OF \$200,000 WAS PAID BY THE FOUNDATION TO E+CO, INC. ON OCTOBER 23, 2009.

AMOUNT

TO FORM 990-PF, PART IX-B, LINE 1

200,000.

FORM 990-PF	SUMMARY OF PROGRAM-RELATED INVESTMENTS	STATEMENT 22
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DESCRIPTION

THE FOUNDATION IS LENDING FUNDS AT A BELOW MARKET INTEREST RATE TO SELCO SOLAR LIGHT LIMITED, AN INDIAN FOR-PROFIT CORPORATION THAT PRODUCES DIFFERENT ENERGY SERVICES, TO SUPPORT THEIR BUSINESS PLAN, INCLUDING ITS PROJECT TO REACH 200,000 HOUSEHOLDS WITH SOLUTIONS FOR THEIR ENERGY REQUIREMENTS, THEREBY IMPROVING THEIR STANDARD OF LIVING. A PAYMENT OF \$125,000 WAS PAID BY THE FOUNDATION TO SELCO SOLAR LIGHT PVT. LTD. ON JUNE 16, 2009.

AMOUNT

TO FORM 990-PF, PART IX-B, LINE 2

125,000.

FORM 990-PF

REDUCTION EXPLANATION
PART X, LINE 1E

STATEMENT 23

EXPLANATION FOR REDUCTION CLAIMED FOR BLOCKAGE OR OTHER FACTORS

DESCRIPTION OF ASSET OR ASSET GROUP:

50.99% INTEREST IN LEMELSON MEDICAL EDUCATION AND RESEARCH FOUNDATION,
L.P., A CLOSELY HELD LIMITED PARTNERSHIP, THROUGHOUT THE YEAR.

PERCENTAGE OF SECURITIES OUTSTANDING: 50.99%

FMV OF ASSET PRIOR TO DISCOUNT: \$1,408,344

AMOUNT OF DISCOUNT CLAIMED: \$ 413,344

EXPLANATION OF WHY THE CLAIMED DISCOUNT IS APPROPRIATE IN THE
VALUATION:

SEE STATEMENT 10C.

FORM 990-PF

PART XV - LINE 1B
LIST OF FOUNDATION MANAGERS

STATEMENT 24

NAME OF MANAGER

ERIC LEMELSON
ROBERT LEMELSON

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Calvert Social Investment Foundation,
Inc.
7315 Wisconsin Avenue
Suite 1100W
Bethesda, Maryland 20814

Date and Amount of Grant: 10/08/2009 \$100,000.00

Purpose of the Grant: The Foundation made a program-related investment in Calvert Social Investment Foundation, Inc. ("Calvert") by making a loan to Calvert for the purpose of providing Calvert with a portion of the funds that is needed to offer D. Light Design Inc. (a corporation engaged in the business of designing, manufacturing, and distributing high quality, low cost LED lighting products that replace kerosene lanterns for very low-income people) in term loans for working capital purposes and for which the Foundation will absorb first loss.

Amounts Expended by Grantee: Calvert has expended the full amount of the Foundation's loan to D.Light; the promissory note from Calvert to the Foundation is still outstanding.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 05/01/2010, 07/27/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Center for Rural Technology, Nepal
PO Box 3628
Tripureswor, Kathmandu, Nepal

Date and Amount of Grant: 10/03/2008 \$33,990.00

Purpose of the Grant: To support building awareness of, installing and monitoring 100 micro-hydro power generators intended for single household power generation in four districts of rural Nepal.

Amounts Expended by Grantee: \$15,403.75

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 03/11/2009, 11/10/2009, 08/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: Center for the Application of Molecular
Biology to International Agriculture
Clunies Ross Street, opp. Dickson Road
GPO Box 3200
Canberra, ACT, Australia 2601

Date and Amount of Grant:	06/10/2009	\$100,000.00
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Purpose of the Grant:	To support the Initiative for Open Innovation ("IOI") and IOI's support of India's Council of Scientific and Industrial Research's open source drug discovery process for tuberculosis.
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Amounts Expended by Grantee:	No grant funds reported expended.
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Diversion of Funds:	To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.
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Date of Reports Received:	10/20/2010
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Verification of Reports:	No
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The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Centro de Especialização em
Fonoaudiologia Clínica
Av Dr. Arnaldo, 2105
Sao Paulo, Brazil 01255-000

Date and Amount of Grant: 12/22/2008 \$231,550.00

Purpose of the Grant: To support the replication of a low-cost hearing aid project from Botswana to Brazil.

Amounts Expended by Grantee: \$231,550.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/13/2009, 12/16/2009, 12/22/2009, 06/22/2010, 06/24/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: Centro de Especialização em
Fonoaudiologia Clínica
Av Dr. Arnaldo, 2105
Sao Paulo, Brazil 01255-000

Date and Amount of Grant: 07/15/2009 \$100,000.00

Purpose of the Grant: To support the replication of a low-cost hearing aid project from Botswana to Brazil.

Amounts Expended by Grantee: \$100,000.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/16/2009, 12/22/2009, 06/22/2010, 06/24/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: Conversion Sound, LLC
7641 Terrace Drive
El Cerrito, California 94530

Date and Amount of Grant: 07/01/2009 \$100,000.00

Purpose of the Grant: The Foundation made a program-related investment in Conversion Sound, LLC ("Conversion Sound") by purchasing limited liability company units of Conversion Sound in order to provide Conversion Sound with working capital to fund hardware and software engineering necessary to build a production-ready prototype of a low-cost hearing aid.

Amounts Expended by Grantee: \$100,000.00 The Foundation will continue to hold this investment.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 02/16/2010, 07/23/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Emergence BioEnergy, Inc.
129 Mount Auburn Street
Cambridge, Massachusetts 02138

Date and Amount of Grant: 01/12/2009 \$200,000.00

Purpose of the Grant: To be used to test the concept of a village power system generated through stirling engines.

Amounts Expended by Grantee: \$146,228.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 08/31/2009, 12/21/2009

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Emergence BioEnergy, Inc.
129 Mount Auburn Street
Cambridge, Massachusetts 02138

Date and Amount of Grant: 06/30/2004 \$115,948.75 (This amount was increased from \$100,825.)

Purpose of the Grant: The Foundation made a program-related investment in Emergence BioEnergy, Inc. ("Emergence") by providing a loan to Emergence for the purpose of providing Emergence with capital to conduct a feasibility study of combining the Grameen Phone business model with low-cost energy generation technology to test if rural entrepreneurs can create mini power plants at the village level.

Amounts Expended by Grantee: \$101,044.00 The promissory note from Emergence to the Foundation is still outstanding.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 10/20/2009

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Foundation for Geothermal Innovation
7543 Lolina Ave
Los Angeles, California 90046

Date and Amount of Grant: 02/03/2009 \$28,000.00

Purpose of the Grant: To support a one-day geothermal pump design meeting to be held February 11, 2009, to encourage the development of new downhole geothermal pump technology that will provide clean renewable energy.

Amounts Expended by Grantee: \$26,576.58 Amounts Expended; (\$1,423.42 Returned to Foundation)

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/06/2009, 12/08/2009

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Gujarat Mahila Housing SEWA Trust
404, Sakar IV, Ashram Road
Ellisbridge
Ahmedabad, India 380006

Date and Amount of Grant: 06/09/2009 \$100,000.00

Purpose of the Grant: To support the creation of the Innovation Center for the Poor.

Amounts Expended by Grantee: \$88,241.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 11/02/2009, 05/05/2010, 07/14/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: Indian Institute of Technology, Madras
Centre for Industrial Consultancy and
Sponsored Research
Indian Institute of Technology, Madras
Tamil Nadu

Chennai, India 600 036

Date and Amount of Grant: 04/24/2008 \$43,003.00

Purpose of the Grant: To support a Lemelson Recognition and Mentoring Program (RAMP) pilot program in the State of Tamil Nadu, India.

Amounts Expended by Grantee: \$43,003.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 06/06/2008, 11/17/2008, 08/11/2009, 04/07/2010, 06/11/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Indian Institute of Technology, Madras
Centre for Industrial Consultancy and
Sponsored Research
Indian Institute of Technology, Madras
Tamil Nadu

Chennai, India 600 036

Date and Amount of Grant: 11/21/2008 \$43,003.00

Purpose of the Grant: To support a Lemelson Recognition and Mentoring Program (RAMP) pilot program in the State of Tamil Nadu, India.

Amounts Expended by Grantee: \$42,641.70

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 08/11/2009, 04/07/2010, 06/11/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee:	Institut Pertanian Bogor Gedung Rektorat IPB, Lantai 5 Kampus IPB Darmaga Bogor Indonesia 16680	
Date and Amount of Grant:	04/30/2008	\$106,606.00
Purpose of the Grant:	To support the development of a Lemelson Recognition and Mentoring Program (L-RAMP) in Indonesia.	
Amounts Expended by Grantee:	\$101,128.00 Amounts Expended; (\$5,478.00 Returned to Foundation)	
Diversion of Funds:	To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.	
Date of Reports Received:	12/09/2008, 06/12/2009, 07/29/2009, 08/26/2009, 01/08/2010, 03/30/2010	
Verification of Reports:	No	

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Institut Pertanian Bogor
Gedung Rektorat IPB, Lantai 5
Kampus IPB Darmaga Bogor
Indonesia 16680

Date and Amount of Grant: 11/21/2008 \$53,063.00

Purpose of the Grant: To support the development of a Lemelson Recognition and Mentoring Program (L-RAMP) in Indonesia.

Amounts Expended by Grantee: (\$53,063.00 Returned to Foundation) Full amount of grant was returned to Foundation as it was not expended by Institut Pertanian Bogor.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/09/2008, 06/12/2009, 07/29/2009, 08/26/2009, 01/08/2010, 03/30/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: Institut Pertanian Bogor
Gedung Rektorat IPB, Lantai 5
Kampus IPB Darmaga Bogor
Indonesia 16680

Date and Amount of Grant: 05/14/2009 \$286,800.00

Purpose of the Grant: To improve Institut Pertanian Bogor's existing university-level technopreneurship curricula, to develop new courses focused on inventions for social applications, and to develop a new pre-mentoring program for students.

Amounts Expended by Grantee: \$94,788.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/31/2009, 05/03/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: International Development Enterprises
(India)
C-5 / 43, Safdarjung Development Area
New Delhi, India 110 016

Date and Amount of Grant: 12/07/2009 \$100,000.00

Purpose of the Grant: To support a program to establish a supply and distribution chain for micro-irrigation systems to small plot farmers in the states of Tamil Nadu.

Amounts Expended by Grantee: No grant funds reported expended.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/09/2010, 08/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: International Development Enterprises
(India)
C-5 / 43, Safdarjung Development Area
New Delhi, India 110 016

Date and Amount of Grant: 12/19/2008 \$100,000.00

Purpose of the Grant: To support a program to establish a supply and distribution chain for micro-irrigation systems to small plot farmers in the states of Tamil Nadu.

Amounts Expended by Grantee: \$21,437.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/14/2009, 07/09/2010, 08/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: International Development Enterprises
(India)
C-5 / 43, Safdarjung Development Area
New Delhi, India 110 016

Date and Amount of Grant: 06/12/2009 \$427,744.00

Purpose of the Grant: To support the creation of the Center for Innovation to Impact.

Amounts Expended by Grantee: \$55,850.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/16/2009, 07/13/2010, 08/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Micro-enterprise Inventor Program of
Oregon
5257 NE MLK suite 201
Portland, Oregon 97221

Date and Amount of Grant: 11/12/2009 \$40,000.00

Purpose of the Grant: To support the Micro-Enterprise Inventor Program of Oregon during a transition year as it applies for tax-exempt status and hires a managing director to strengthen the organization.

Amounts Expended by Grantee: \$26,066.71

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 02/22/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: OptiOpia, Inc.
2175 Monarch Street
Alameda, California 94501

Date and Amount of Grant: 02/11/2008 \$300,000.00

Purpose of the Grant: To support the advancement of the development and commercialization of a low-cost auto-refractor technology, in order to address a significant and recognized global health need.

Amounts Expended by Grantee: No grant funds reported expended.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: None Received. The Foundation contacted the grantee on 3/30/2009, 9/2/2009, 8/12/2010 and 10/19/2010.

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Pontificia Universidad Catolica del Peru,
GRUPO
Av. Universitaria No 1801, San Miguel
Lima, Peru

Date and Amount of Grant: 06/24/2008 \$146,316.00

Purpose of the Grant: To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.

Amounts Expended by Grantee: \$146,316.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 04/05/2010, 04/06/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Pontificia Universidad Catolica del Peru,
GRUPO
Av. Universitaria No 1801, San Miguel
Lima, Peru

Date and Amount of Grant: 12/22/2009 \$38,455.00

Purpose of the Grant: To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.

Amounts Expended by Grantee: No grant funds reported expended.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 04/06/2010, 04/29/2010, 06/03/2010, 06/15/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Pontificia Universidad Catolica del Peru,
GRUPO
Av. Universitaria No 1801, San Miguel
Lima, Peru

Date and Amount of Grant: 06/16/2009 \$39,090.00

Purpose of the Grant: To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.

Amounts Expended by Grantee: \$18,220.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 09/04/2009, 12/04/2009, 04/06/2010, 04/29/2010,
06/03/2010, 06/15/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Rural Innovations Networks Foundation
20/6, Lakshmipuram Second Street
Lloyd's Road
Royapettah
Chennai, Tamil Nadu, India 600014

Date and Amount of Grant: 10/30/2008 \$186,088.00

Purpose of the Grant: To support a Lemelson Recognition and Mentoring Program (RAMP) Center pilot program in the State of Tamil Nadu, India.

Amounts Expended by Grantee: \$144,677.00 Amounts Expended; (\$41,411.00 Returned to Foundation)

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 02/01/2009, 06/12/2009, 08/11/2009, 08/26/2009, 12/31/2009, 04/28/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Rural Innovations Networks Foundation
20/6, Lakshmipuram Second Street
Lloyd's Road
Royapettah
Chennai, Tamil Nadu, India 600014

Date and Amount of Grant: 05/14/2008 \$50,575.00

Purpose of the Grant: To support a Lemelson Recognition and Mentoring Program (RAMP) Center pilot program in the State of Tamil Nadu, India.

Amounts Expended by Grantee: \$50,575.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 06/06/2008, 08/31/2008, 02/01/2009, 06/12/2009, 08/11/2009, 08/26/2009, 12/31/2009, 04/28/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 01/08/2009 \$88,395.00

Purpose of the Grant: To support the development of an Innovation Department to link modern energy services to income-generating activities and create models that could be replicated and taken to scale.

Amounts Expended by Grantee: \$88,395.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/24/2009, 12/14/2009, 07/14/2010, 07/15/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 12/23/2008 \$350,000.00

Purpose of the Grant: The Foundation made a program-related investment in SELCO Solar Light Pvt. Ltd ("SELCO") by purchasing equity shares of SELCO, the proceeds of which to be used by SELCO to provide reliable energy services to 200,000 households in a sustainable way and helps create models for poverty alleviation through commercial channels.

Amounts Expended by Grantee: The full amount of the proceeds from the Foundation's investment is being used for the purposes of the Foundation's investment.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/29/2009, 07/23/2010, 07/29/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 06/16/2009 \$125,000.00

Purpose of the Grant: The Foundation made a program-related investment in SELCO Solar Light Pvt. Ltd. ("Selco") by providing a loan to SELCO for SELCO to use to fund a project to reach 200,000 households with solutions for their energy requirements, thereby improving their standard of living.

Amounts Expended by Grantee: The promissory note from SELCO to the Foundation remains outstanding.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 07/30/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 07/21/2009 \$58,127.50

Purpose of the Grant: To support the pilot project of low cost solar lighting systems for poor households.

Amounts Expended by Grantee: \$58,127.50

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 10/29/2009

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 08/14/2009 \$75,956.00

Purpose of the Grant: To support the development of an Innovation Department to link modern energy services to income-generating activities and create models that could be replicated and taken to scale.

Amounts Expended by Grantee: \$62,345.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/14/2009, 07/14/2010, 07/15/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: SELCO Solar Light Pvt. Ltd.
#742, 15th Cross, 6th Phase
JP Nagar
Bangalore, India 560 078

Date and Amount of Grant: 08/19/2008 \$82,799.00

Purpose of the Grant: To support the development of an Innovation Department to link modern energy services to income-generating activities and create models that could be replicated and taken to scale.

Amounts Expended by Grantee: \$82,799.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/17/2008, 07/24/2009, 12/14/2009, 07/14/2010, 07/15/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Schwab Foundation for Social
Entrepreneurship
91-93 Route de la Capite
CH-1223 Cologny / Geneva, Switzerland

Date and Amount of Grant: 04/03/2008 \$213,334.00

Purpose of the Grant: To support the transfer and scaling-up of technologies and innovations between social entrepreneurs from the networks of Schwab, The Lemelson Foundation, and potentially the Skoll Foundation.

Amounts Expended by Grantee: \$213,334.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 09/30/2008, 03/06/2009, 10/01/2009, 10/02/2009, 12/09/2009, 04/06/2010, 10/13/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Schwab Foundation for Social
Entrepreneurship
91-93 Route de la Capite
CH-1223 Cologny / Geneva, Switzerland

Date and Amount of Grant: 03/26/2009 \$320,000.00

Purpose of the Grant: To support the transfer and scaling-up of technologies and innovations between social entrepreneurs from the networks of Schwab, The Lemelson Foundation, and potentially the Skoll Foundation.

Amounts Expended by Grantee: \$320,000.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 10/01/2009, 10/02/2009, 12/09/2009, 04/06/2010,
10/13/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959

2009 Form 990-PF

Part VII-B, Question 5c

Expenditure Responsibility Statement

Grantee: SolarAid
Pride Court, 89-82 White Lion Street
London, United Kingdom N1 9PF, UK

Date and Amount of Grant: 06/23/2009 \$130,000.00

Purpose of the Grant: To design, develop prototypes for, and test a solar LED retrofit kit for kerosene lanterns and a low-cost gravity-powered LED light.

Amounts Expended by Grantee: \$90,648.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 12/22/2009, 07/30/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: StrawJet, Inc.
350 Clinton Street
Ashland, Oregon 97520

Date and Amount of Grant: 01/17/2008 \$25,000.00

Purpose of the Grant: To support StrawJet's efforts to develop a building industry based on sound environmental principles using agricultural by-products and non-toxic materials, and to enable residents of the developing world and others who have lost homes through natural disasters to live in safe and comfortable homes without depleting the world's supply of timber and non-renewable resources.

Amounts Expended by Grantee: \$25,000.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 04/10/2009, 08/24/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Sustainable Harvest Inc.
The Natural Capital Center
721 NW Ninth Avenue
Suite 235
Portland, Oregon 97209

Date and Amount of Grant: 12/19/2008 \$90,775.00

Purpose of the Grant: To support the introduction of new coffee technologies to improve the processing and handling of specialty coffee in the Gombe region of eastern Tanzania.

Amounts Expended by Grantee: \$90,775.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 05/29/2009, 09/10/2009, 04/01/2010, 04/21/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Sustainable Harvest Inc.
The Natural Capital Center
721 NW Ninth Avenue
Suite 235
Portland, Oregon 97209

Date and Amount of Grant:	06/09/2009	\$90,775.00
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Purpose of the Grant:	To support the introduction of new coffee technologies to improve the processing and handling of specialty coffee in the Gombe region of eastern Tanzania.
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Amounts Expended by Grantee:	\$90,775.00
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Diversion of Funds:	To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.
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Date of Reports Received:	09/10/2009, 04/01/2010, 04/21/2010
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Verification of Reports:	No
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The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Villgro Innovations Foundation (formerly
known as Rural Innovations Network)
III Floor, IITM Research Park, Kanagam
Road
Taramani
Chennai, India 600 113

Date and Amount of Grant: 06/04/2009 \$222,000.00

Purpose of the Grant: To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.

Amounts Expended by Grantee: \$222,000.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 04/20/2010, 05/07/2010, 11/02/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Villgro Innovations Foundation (formerly
known as Rural Innovations Network)
III Floor, IITM Research Park, Kanagam
Road
Taramani
Chennai, India 600 113

Date and Amount of Grant: 06/04/2009 \$640,389.00

Purpose of the Grant: To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.

Amounts Expended by Grantee: \$578,846.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 11/02/2009, 04/20/2010, 05/07/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Yayasan Inovasi Teknologi
P.T. Saratoga Investama Sedaya
Menara Karya #15-00
Jl. H. R. Rasuna Said Blok X-5, Kav.1-2
Jakarta, Indonesia 12950

Date and Amount of Grant: 11/25/2009 \$51,617.00

Purpose of the Grant: To support Yayasan Inovasi Teknologi's coordination and leading of the Indonesia Recognition and Mentoring Program (RAMP) in partnership with Institut Pertanian Bogor (IPB) and a soon-to-be identified implementing partner.

Amounts Expended by Grantee: No grant funds reported expended.

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 01/03/2010, 04/29/2010, 06/04/2010, 10/05/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Yayasan Inovasi Teknologi
P.T. Saratoga Investama Sedaya
Menara Karya #15-00
Jl. H. R. Rasuna Said Blok X-5, Kav.1-2
Jakarta, Indonesia 12950

Date and Amount of Grant: 11/21/2008 \$209,339.00

Purpose of the Grant: To support YIT's coordination and leading of the Indonesia Recognition and Mentoring Program (RAMP) in partnership with Institut Pertanian Bogor (IPB).

Amounts Expended by Grantee: \$162,241.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 04/09/2009, 04/10/2009, 10/20/2009, 01/03/2010,
04/29/2010, 06/04/2010, 10/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Yayasan Inovasi Teknologi
P.T. Saratoga Investama Sedaya
Menara Karya #15-00
Jl. H. R. Rasuna Said Blok X-5, Kav.1-2
Jakarta, Indonesia 12950

Date and Amount of Grant: 06/02/2008 \$209,339.00

Purpose of the Grant: To support YIT's coordination and leading of the Indonesia Recognition and Mentoring Program (RAMP) in partnership with Institut Pertanian Bogor (IPB).

Amounts Expended by Grantee: \$209,339.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 11/10/2008, 04/09/2009, 04/10/2009, 10/20/2009, 01/03/2010, 04/29/2010, 06/04/2010, 10/05/2010

Verification of Reports: No

The Lemelson Foundation. 88-0391959
2009 Form 990-PF
Part VII-B, Question 5c
Expenditure Responsibility Statement

Grantee: Yayasan Inovasi Teknologi
P.T. Saratoga Investama Sedaya
Menara Karya #15-00
Jl. H. R. Rasuna Said Blok X-5, Kav.1-2
Jakarta, Indonesia 12950

Date and Amount of Grant: 08/20/2008 \$129,180.00

Purpose of the Grant: To support Yayasan Inovasi Teknologi's coordination and leading of the Indonesia Recognition and Mentoring Program (RAMP) in partnership with Institut Pertanian Bogor (IPB) and a soon-to-be identified implementing partner.

Amounts Expended by Grantee: \$114,212.00

Diversion of Funds: To the knowledge of the grantor, the grantee has not diverted any portion of the funds from the purpose of the grant.

Date of Reports Received: 11/10/2008, 04/09/2009, 04/10/2009, 10/20/2009, 01/03/2010, 04/29/2010, 06/04/2010, 10/05/2010

Verification of Reports: No

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
African American Male Achievers Network, Inc. c/o International Science Discovery & Learning Center, 6709 La Tijera Blvd., #261 Los Angeles California, 90045 United States	N/A	509(a)(1) public charity	To support the operations of African American Male Achievers Network, Inc.	73,970
Appropriate Infrastructure Development Group 33 Harrison Avenue, 5th Floor Weston Massachusetts, 02111 United States	N/A	509(a)(1) public charity	To support research and development of new energy technologies for poor people and to initiate a loan fund to finance locally-owned businesses that will develop and install alternative energy infrastructure in Guatemala and Haiti.	20,000
Appropriate Infrastructure Development Group 33 Harrison Avenue, 5th Floor Weston Massachusetts, 02111 United States	N/A	509(a)(1) public charity	To support research and development of new energy technologies for poor people and to initiate a loan fund to finance locally-owned businesses that will develop and install alternative energy infrastructure in Guatemala and Haiti.	80,000
Ashoka 1700 N. Moore Street, Suite 2000 Arlington Virginia, 22209 United States	N/A	170(b)(1)(A)(vi) public charity	To support the "Ashoka-Lemelson Fellows Program," a three-year pilot awards program.	754,557
Ashoka 1700 N. Moore Street, Suite 2000 Arlington Virginia, 22209 United States	N/A	170(b)(1)(A)(vi) public charity	Supplement to cover public relations, online activities and additional travel for Ashoka's global celebration event in India.	95,000
Ashoka 1700 N. Moore Street, Suite 2000 Arlington Virginia, 22209 United States	N/A	170(b)(1)(A)(vi) public charity	To fund a documentary that will air on MTV internationally to spread the stories of invention ventures launched through the Invent Your World program and inspire more young people to develop invention-based ventures.	30,000
Ashoka 1700 N. Moore Street, Suite 2000 Arlington Virginia, 22209 United States	N/A	170(b)(1)(A)(vi) public charity	To support a global celebration event in India in 2010 that will bring together the critical mass of 100 Ashoka-Lemelson Fellows.	100,000
Ashoka 1700 N. Moore Street, Suite 2000 Arlington Virginia, 22209 United States	N/A	170(b)(1)(A)(vi) public charity	To support a global celebration event in India in 2010 that will bring together the critical mass of 100 Ashoka-Lemelson Fellows.	200,000
Carnegie Mellon University 5000 Forbes Avenue Pittsburgh Pennsylvania, 15213 United States	N/A	509(a)(1) public charity	To support the program "Telepresence Applications" as part of the National Collegiate Inventors and Innovators Alliance Program.	10,270

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Center for the Application of Molecular Biology to International Agriculture Clunies Ross Street, opp. Dickson Road, GPO Box 3200 Canberra, ACT 2601 Australia	N/A	Non-501(c)(3)	To support the Initiative for Open Innovation ("IOI") and IOI's support of India's Council of Scientific and Industrial Research's open source drug discovery process for tuberculosis.	100,000
Centro de Especializacao em Fonoaudiologia Clinica Av Dr. Arnaldo, 2105 Sao Paulo 01255-000 Brazil	N/A	Non-501(c)(3)	To support the replication of a low-cost hearing aid project from Botswana to Brazil.	100,000
Climate Solutions 219 Legion Way SW, Suite 201 Olympia Washington, 98501 United States	N/A	509(a)(1) public charity	To support the New Energy System Project.	100,000
Crossroads Community Outreach Foundation 1714 21st Street Santa Monica California, 90404 United States	N/A	509(a)(1) public charity	To support the P.S. Science program at St. Anne School in Santa Monica, California, and to expand the program to another school.	100,000
Design That Matters, Inc. One Broadway, 14th Floor Cambridge Massachusetts, 02142 United States	N/A	509(a)(1) public charity	To support the hiring of two people and become a partially self-sustaining enterprise based on client income and philanthropy.	75,000
East County One Stop AVITA Business Center, 5257 NE MLK Jr. Blvd., Suite 201 Portland Oregon, 97211 United States	N/A	170(b)(1)(A)(vi) public charity	To support a program to provide independent inventors in Oregon with access to resources, mentoring, training, and networking to develop, market, and protect their inventions and intellectual property.	56,426
East Meets West Foundation P.O. Box 29292 Oakland California, 94604 United States	N/A	509(a)(1) public charity	To support the expansion of the Breath of Life program in Cambodia and Laos.	125,000
East Meets West Foundation P.O. Box 29292 Oakland California, 94604 United States	N/A	509(a)(1) public charity	To support the expansion of the Breath of Life program in Cambodia and Laos.	125,000

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Ecotrust 721 NW 9th Avenue, Suite 200 Portland 97209	N/A	170(b)(1)(A)(vi) public charity	To support the Andrew Revkin lecture on November 10, 2009.	5,000
Ecotrust 721 NW 9th Avenue, Suite 200 Portland 97209	N/A	170(b)(1)(A)(vi) public charity	To support the Thomas Friedman lecture on March 9, 2009.	5,000
Embrace 42 E Portola Ave Los Altos California, 94022 United States	N/A	509(a)(1) public charity	To support the patent, manufacture, field-test, and more full development of the distribution model in India for a \$25 baby thermoregulator	50,000
Embrace 42 E Portola Ave Los Altos California, 94022 United States	N/A	509(a)(1) public charity	To support the patent, manufacture, field-test, and more full development of the distribution model in India for a \$25 baby thermoregulator.	50,000
Emergence BioEnergy, Inc. 129 Mount Auburn Street Cambridge Massachusetts, 02138 United States	N/A	Non-501(c)(3)	To be used to test the concept of a village power system generated through stirring engines.	200,000
Envirofit International 430 N. College Avenue Fort Collins Colorado, 80523 United States	N/A	170(b)(1)(A)(vi) public charity	To support full scale development of direct injection retrofit kits for motorcycle taxis in Vigan, Philippines.	125,000
Farmers Conservation Alliance 14 Oak Street, Suite 302 Hood River Oregon, 97031 United States	N/A	509(a)(1) public charity	To support the marketing and distribution of Farmers Screen, a patented irrigation diversion screen that protects threatened and endangered fish species while saving farmer's time and money.	75,000
Farmers Conservation Alliance 14 Oak Street, Suite 302 Hood River Oregon, 97031 United States	N/A	509(a)(1) public charity	To support the marketing and distribution of Farmers Screen, a patented irrigation diversion screen that protects threatened and endangered fish species while saving farmer's time and money.	75,000
Foundation for Geothermal Innovation 7543 Lolina Ave Los Angeles California, 90046 United States	N/A	Non-501(c)(3)	To support a one-day geothermal pump design meeting to be held February 11, 2009, to encourage the development of new downhole geothermal pump technology that will provide clean renewable energy.	28,000

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Grantmakers of Oregon & SW Washington P.O. Box 6381 Portland Oregon, 97228-6381 United States	N/A	170(b)(1)(A)(vi) public charity	To support the partial salary and benefits for a new administrative assistant.	15,000
Gujarat Mahila Housing SEWA Trust 404, Sakar IV, Ashram Road, Ellisbridge Ahmedabad 380006 India	N/A	Non-501(c)(3)	To support the creation of the Innovation Center for the Poor.	100,000
Institut Pertanian Bogor Gedung Rektorat IPB, Lantai 5, Kampus IPB Darmaga Bogor 16680 Indonesia	N/A	Non-501(c)(3)	To improve Institut Pertanian Bogor's existing university-level entrepreneurship curricula, to develop new courses focused on inventions for social applications, and to develop a new pre-mentoring program for students.	286,800
International Development Enterprises (India) C-5 / 43, Safdarjung Development Area New Delhi 110 016 India	N/A	Non-501(c)(3)	To support a program to establish a supply and distribution chain for micro-irrigation systems to small plot farmers in the states of Tamil Nadu.	100,000
International Development Enterprises (India) C-5 / 43, Safdarjung Development Area New Delhi 110 016 India	N/A	Non-501(c)(3)	To support the creation of the Center for Innovation to Impact.	427,744
International Potato Center Av. La Molina 1895, La Molina, Apartado 1558 Apartado 1558 Lima 12 Peru	N/A	170(b)(1)(A)(ii) public charity	To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.	37,065
International Potato Center Av. La Molina 1895, La Molina, Apartado 1558 Apartado 1558 Lima 12 Peru	N/A	170(b)(1)(A)(ii) public charity	To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.	28,357
KickStart International, Inc. 2435 Polk Street San Francisco California, 94109 United States	N/A	170(b)(1)(A)(vi) public charity	To support the establishment of a technology development center and the development of three manual pump products for irrigated agriculture in Africa.	96,525

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
KickStart International, Inc. 2435 Polk Street San Francisco California, 94109 United States	N/A	170(b)(1)(A)(vi) public charity	To support the establishment of a technology development center and the development of three manual pump products for irrigated agriculture in Africa	96,525
Lex Mundi Pro Bono Foundation 1330 Connecticut Avenue, NW Washington District of Columbia, 20036 United States	N/A	509(a)(1) public charity	To support the delivery of free legal services to social inventor-entrepreneurs, and to help it become financially sustainable.	70,000
Lex Mundi Pro Bono Foundation 1330 Connecticut Avenue, NW Washington District of Columbia, 20036 United States	N/A	509(a)(1) public charity	To support the delivery of free legal services to social inventor-entrepreneurs, and to help it become financially sustainable.	70,000
Living Goods 678 Sausalito Blvd Sausalito California, 94965 United States	N/A	509(a)(1) public charity	To support the establishment of three incubator branches in Uganda that will test market inventions in lighting, water purification and cookstoves, and experiment with pricing and bonuses for sales people.	114,158
Living Goods 678 Sausalito Blvd Sausalito California, 94965 United States	N/A	509(a)(1) public charity	To support the establishment of three incubator branches in Uganda that will test market inventions in lighting, water purification and cookstoves, and experiment with pricing and bonuses for sales people.	154,136
Massachusetts Institute of Technology 77 Massachusetts Avenue, 238 Main Street Cambridge Massachusetts, 02142 United States	N/A	170(b)(1)(A)(ii) public charity	To support the International Development Initiative to mentor MIT students to cultivate invention, innovation, and entrepreneurship in service of communities in developing regions of the world.	135,168
Massachusetts Institute of Technology 77 Massachusetts Avenue, 238 Main Street Cambridge Massachusetts, 02142 United States	N/A	170(b)(1)(A)(ii) public charity	To support MIT Press to develop and market its Innovations Journal and to sponsor 180 subscriptions to Innovations for Foundation grantees and partners for three years.	60,000
Massachusetts Institute of Technology 77 Massachusetts Avenue, 238 Main Street Cambridge Massachusetts, 02142 United States	N/A	170(b)(1)(A)(ii) public charity	To support 'Innovations Special Edition' for the Ashoka-Lemelson Celebration.	30,500
Massachusetts Institute of Technology 77 Massachusetts Avenue, 238 Main Street Cambridge Massachusetts, 02142 United States	N/A	170(b)(1)(A)(ii) public charity	To support the activities of the Lemelson-MIT Program directed toward inspiring appreciation for the role of invention and innovation in economic and social development; celebrating the living role models of successful inventors, innovators, and entrepreneurs; and inspiring the next generation of inventors.	2,948,825

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Mercy Corps Dept. W, 3015 SW First Avenue Portland Oregon, 97201 United States	N/A	509(a)(1) public charity	To co-host the grand opening of the new building.	10,000
Micro-enterprise Inventor Program of Oregon 5257 NE MLK suite 201 Portland Oregon, 97221 United States	N/A	Non-501(c)(3)	To support the Micro-Enterprise Inventor Program of Oregon during a transition year as it applies for tax-exempt status and hires a managing director to strengthen the organization.	40,000
National Collegiate Inventors and Innovators Alliance 100 Venture Way Hadley Massachusetts, 01035 United States	N/A	170(b)(1)(A)(ii) public charity	To support the continued implementation of experimental learning programs that promote invention, innovation, and entrepreneurship in higher education and to introduce new opportunities that increase the potential for commercialization of student innovations and provide new opportunities for students not yet involved in NCIIA programs.	778,350
National Collegiate Inventors and Innovators Alliance 100 Venture Way Hadley Massachusetts, 01035 United States	N/A	170(b)(1)(A)(ii) public charity	To support the continued implementation of experimental learning programs that promote invention, innovation, and entrepreneurship in higher education and to introduce new opportunities that increase the potential for commercialization of student innovations and provide new opportunities for students not yet involved in NCIIA programs.	1,200,250
Non-Profit Enterprise Self-Sustainability Team Jose Arrieta 89 Providencia, Santiago 7500900 Chile	N/A	509(a)(1) public charity	To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor students and grassroots inventors, innovators and entrepreneurs in Peru.	79,279
Oregon Museum of Science and Industry 1945 SE Water Avenue Portland Oregon, 97214 United States	N/A	509(a)(2) public charity	To support the general operations of the Oregon Museum of Science and Industry in 2009.	25,000
Pontificia Universidad Catolica del Peru, GRUPO Av. Universitaria No 1801, San Miguel Lima Peru	N/A	Non-501(c)(3)	To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.	38,455
Pontificia Universidad Catolica del Peru, GRUPO Av. Universitaria No 1801, San Miguel Lima Peru	N/A	Non-501(c)(3)	To support a pilot Recognition and Mentoring Program (RAMP) to identify, celebrate, and mentor student and grassroots inventors, innovators, and entrepreneurs in Peru.	39,090

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Portland Opportunities Industrialization Center, Inc. 717 N Killingsworth Court Portland Oregon, 97217 United States	N/A	509(a)(1) public charity	To support video game creation and web design to provide at-risk students with an opportunity to create, invent, and pave the way for other non-information technology related invention education activities in the future	80,509
Portland Opportunities Industrialization Center, Inc. 717 N Killingsworth Court Portland Oregon, 97217 United States	N/A	509(a)(1) public charity	To support the operations of Rosemary Anderson High School in 2009.	50,000
Portland State University Foundation Office of University Development, PO Box 751 Portland Oregon, 97207 United States	N/A	170(b)(1)(A)(vi) public charity	To support Oregon MESA's activities that bring invention education into programs targeting low-income middle and high school students in sixteen Oregon schools.	51,503
Portland State University Foundation Office of University Development, PO Box 751 Portland Oregon, 97207 United States	N/A	170(b)(1)(A)(vi) public charity	To co-sponsor the November 9, 2009, Electronic Vehicle Roadmap conference and to co-fund the creation of an information portal for a new electric vehicle coordination project at Portland State University.	5,000
Portland State University Foundation Office of University Development, PO Box 751 Portland Oregon, 97207 United States	N/A	170(b)(1)(A)(vi) public charity	To support the general operations of the Oregon MESA program in 2009.	25,000
Portland State University Foundation Office of University Development, PO Box 751 Portland Oregon, 97207 United States	N/A	170(b)(1)(A)(vi) public charity	To co-sponsor the November 9, 2009, Electronic Vehicle Roadmap conference and to co-fund the creation of an information portal for a new electric vehicle coordination project at Portland State University.	20,000
Program for Appropriate Technology In Health 1455 NW Leary Way Seattle Washington, 98107 United States	N/A	509(a)(1) public charity	To support development and testing with Cascade Designs, Inc. of an inexpensive, portable, small-community, electro-chlorination system for safe drinking water and conduct a field evaluation of its use.	189,614
Program for Appropriate Technology In Health 1455 NW Leary Way Seattle Washington, 98107 United States	N/A	509(a)(1) public charity	To support development and testing with Cascade Designs, Inc. of an inexpensive, portable, small-community, electro-chlorination system for safe drinking water and conduct a field evaluation of its use.	192,472
Rensselaer Polytechnic Institute 110 8th Street, 403 West Hall Troy New York, 12180-3590 United States	N/A	170(b)(1)(A)(ii) public charity	To support the program "DMM Course Revitalization" under the supervision of Dr. Christopher McDermott, as part of the National Collegiate Inventors and Innovators Alliance (NCIIA) program.	10,166

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Rocky Mountain Institute 2317 Snowmass Creek Road Snowmass Colorado, 81654 United States	N/A	509(a)(1) public charity	To support a three-person team to draft the initial menu of incentives that selected "seed" cities will use to become ecosystems that welcome electric vehicles.	25,000
SELCO Solar Light Pvt. Ltd. #742, 15th Cross, 6th Phase, JP Nagar Bangalore 560 078 India	N/A	Non-501(c)(3)	To support the development of an Innovation Department to link modern energy services to income-generating activities and create models that could be replicated and taken to scale.	88,395
SELCO Solar Light Pvt. Ltd. #742, 15th Cross, 6th Phase, JP Nagar Bangalore 560 078 India	N/A	Non-501(c)(3)	To support the pilot project of low cost solar lighting systems for poor households.	58,128
SELCO Solar Light Pvt. Ltd. #742, 15th Cross, 6th Phase, JP Nagar Bangalore 560 078 India	N/A	Non-501(c)(3)	To support the development of an Innovation Department to link modern energy services to income-generating activities and create models that could be replicated and taken to scale.	75,956
Sambotha, Inc. c/o Ellis Dillon, 4062 Valeta St #338 San Diego California, 92110 United States	N/A	170(b)(1)(A)(vi) public charity	To further develop technology and markets for Sambotha's three product lines (Isolyak, Yak Dream and Northa).	87,500
Sambotha, Inc. c/o Ellis Dillon, 4062 Valeta St #338 San Diego California, 92110 United States	N/A	170(b)(1)(A)(vi) public charity	To support innovative livestock management practices, namely the development and production of a yak wool insulation product and improved yak milk gathering and processing for a high value dairy product.	37,100
Sambotha, Inc. c/o Ellis Dillon, 4062 Valeta St #338 San Diego California, 92110 United States	N/A	170(b)(1)(A)(vi) public charity	For operations support and for the testing of a yak hair insulation prototype, and technology development related to processing of yak dairy products and yak hair luxury textiles.	52,000
Sambotha, Inc. c/o Ellis Dillon, 4062 Valeta St #338 San Diego California, 92110 United States	N/A	170(b)(1)(A)(vi) public charity	For operations support and for the testing of a yak hair insulation prototype, and technology development related to processing of yak dairy products and yak hair luxury textiles.	108,000
Saturday Academy 830 SW 10th Avenue, Suite 200 Portland Oregon, 97205 United States	N/A	170(b)(1)(A)(ii) public charity	To support the expansion and enhancement of Saturday Academy's Apprenticeships in Science and Engineering Program by increasing the number of low-income students that participate in the program and by contributing to the program's long-term sustainability.	50,000

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
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<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Schwab Foundation for Social Entrepreneurship 91-93 Route de la Capite CH-1223 Cologny / Geneva Switzerland	N/A	Non-501(c)(3)	To support the transfer and scaling-up of technologies and innovations between social entrepreneurs from the networks of Schwab, The Lemelson Foundation, and potentially the Skoll Foundation.	320,000
Smithsonian Institution Office of the Comptroller National Museum of American History, Behring Center 14th Street and Constitution Avenue NW Washington District of Columbia, 20560 United States	N/A	509(a)(1) public charity	To identify and make accessible audiovisual assets from the Lemelson Foundation and its affiliates.	87,026
Smithsonian Institution Office of the Comptroller National Museum of American History, Behring Center 14th Street and Constitution Avenue NW Washington District of Columbia, 20560 United States	N/A	509(a)(1) public charity	To support the activities of the Museum's Hands on Science Center for joint programming with The Jerome and Dorothy Lemelson Center for the Study of Invention and Innovation.	150,000
Smithsonian Institution Office of the Comptroller National Museum of American History, Behring Center 14th Street and Constitution Avenue NW Washington District of Columbia, 20560 United States	N/A	509(a)(1) public charity	To support the Lemelson Center at the Museum of American History to document certain aspects of the life of Mrs. Dorothy Lemelson in order to further the charitable and educational purposes of the Lemelson Center and the Smithsonian Institution.	9,405
Smithsonian Institution Office of the Comptroller National Museum of American History, Behring Center 14th Street and Constitution Avenue NW Washington District of Columbia, 20560 United States	N/A	509(a)(1) public charity	To support the planning phase for the Places of Invention Exhibition that will explore the relationship between inventors and the physical spaces in which they work.	75,000
SolarAid Pride Court, 89-82 White Lion Street London N1 9PF, UK United Kingdom	N/A	Non-501(c)(3)	To design, develop prototypes for, and test a solar LED retrofit kit for kerosene lanterns and a low-cost gravity-powered LED light.	130,000
Stanford University Board of Trustees Department of BioEngineering, 318 Campus Drive Clark Center, Room E-100D Stanford California, 94305-5428 United States	N/A	509(a)(1) public charity	To support the Stanford India BioDesign Program to fund stipends and training of five Indian BioDesign Fellows, enabling them to replicate Stanford University's successful medical invention and entrepreneurship program entitled "Stanford BioDesign" in India.	100,000

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3a, Grants and Contributions Paid During the Year
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Sustainable Harvest Inc. The Natural Capital Center, 721 NW Ninth Avenue Suite 235 Portland Oregon, 97209 United States	N/A	Non-501(c)(3)	To support the introduction of new coffee technologies to improve the processing and handling of specialty coffee in the Gombe region of eastern Tanzania.	90,775
TechStart Education Foundation US Bank Tower Suite 120, 111 SW 5th Avenue Portland Oregon, 97204 United States	N/A	509(a)(1) public charity	To support the e-CHAMP pilot program in Oregon to leverage increasing amounts of school district funds to pay stipends to engineering head coaches and engineering assistant coaches.	40,000
The Aspen Institute One Dupont Circle NW, Suite 700 Washington District of Columbia, 20036 United States	N/A	509(a)(1) public charity	To support the Aspen Network of Development Entrepreneurs, which is a network of funders and practitioners dedicated to improving lives by growing small enterprises in the developing world.	60,000
The Aspen Institute One Dupont Circle NW, Suite 700 Washington District of Columbia, 20036 United States	N/A	509(a)(1) public charity	To support the capacity building fund of the Aspen Network of Development Entrepreneurs, which is a project of The Aspen Institute and a network of funders and practitioners dedicated to improving lives by growing small enterprises in the developing world.	500,000
Trustees for Harvard University Office of External Affairs, John F. Kennedy School of Government 79 JFK Street, Mailbox 123 Cambridge Massachusetts, 02138 United States	N/A	170(b)(1)(A)(ii) public charity	To support the Women's Leadership Board Fund for Gender Programs.	1,000
Villgro Innovations Foundation (formerly known as Rural Innovations Network) III Floor, IITM Research Park, Kanagam Road, Taramani Chennai 600 113 India	N/A	Non-501(c)(3)	To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.	640,389
Villgro Innovations Foundation (formerly known as Rural Innovations Network) III Floor, IITM Research Park, Kanagam Road, Taramani Chennai 600 113 India	N/A	Non-501(c)(3)	To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.	222,000
WGBH Educational Foundation One Guest Street Boston Massachusetts, 02135 United States	N/A	509(a)(1) public charity	To support the production of Season III of Design Squad, a reality competition series designed to inspire a new generation of engineers, and to produce the Invent Today guide, a booklet for after-school	200,000

The Lemelson Foundation, 88-0391959
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<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
WGBH Educational Foundation One Guest Street Boston Massachusetts, 02135 United States	N/A	509(a)(1) public charity	programs to engage students ages nine to twelve in the creativity of invention. To support a pilot program that will place younger, working engineers (ages 22-30) in after-school programs targeting 5th and 6th graders, especially those from low-income families.	548,570
WGBH Educational Foundation One Guest Street Boston Massachusetts, 02135 United States	N/A	509(a)(1) public charity	To support Design Squad Season 4: Nate's Road Trip, a ten-part series of television shows and video blogs featuring Lemelson-MIT student award winner Nate Ball and aimed at engaging 9-12 year olds in engineering and invention.	200,000
World Affairs Council of Oregon, Inc. 620 SW Main Street, Suite 333 Portland Oregon, 97205 United States	N/A	509(a)(1) public charity	To support the partial sponsorship of the World Affairs Council 2009 International Speaker Series.	15,000
World Wildlife Fund 1250 24th St. NW Washington District of Columbia, 20037-1193 United States	N/A	509(a)(1) public charity	To support the creation of an East African Prize as part of the World Wildlife Fund's 2009 International Smart Gear Competition and work with the winning idea to encourage its adoption in 2010, as well as to support a related fishing gear exchange program in Kenya.	100,000
Yayasan Inovasi Teknologi P.T. Saratoga Investama Sedaya, Menara Karya #15-00 Jl. H. R. Rasuna Said Blok X-5, Kav.1-2 Jakarta 12950 Indonesia	N/A	Non-501(c)(3)	To support Yayasan Inovasi Teknologi's coordination and leading of the Indonesia Recognition and Mentoring Program (RAMP) in partnership with Institut Pertanian Bogor (IPB) and a soon-to-be identified implementing partner.	51,617
Total				<u>14,486,574</u>

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3b, Grants and Contributions Approved for Future Payment
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
African American Male Achievers Network, Inc. c/o International Science Discovery & Learning Center, 6709 La Tijera Blvd., #261 Los Angeles California, 90045 United States	N/A	509(a)(1) public charity	To support the operations of African American Male Achievers Network, Inc.	50,000
African American Male Achievers Network, Inc. c/o International Science Discovery & Learning Center, 6709 La Tijera Blvd., #261 Los Angeles California, 90045 United States	N/A	509(a)(1) public charity	As per the August 2007 board meeting, a resolution was approved stating that the Foundation would make a grant to A-MAN in the amount of \$500,000 for the purchase of real estate for AMAN's program location and to disbursed upon the closing of the purchase of the building	500,000
Gujarat Mahila Housing SEWA Trust 404, Sakar IV, Ashram Road, Ellisbridge Ahmedabad 380006 India	N/A	Non-501(c)(3)	To support the creation of the Innovation Center for the Poor.	350,000
Institut Pertanian Bogor Gedung Rektorat IPB, Lantai 5, Kampus IPB Darmaga Bogor 16680 Indonesia	N/A	Non-501(c)(3)	To improve Institut Pertanian Bogor's existing university-level entrepreneurship curricula, to develop new courses focused on inventions for social applications, and to develop a new pre-mentoring program for students.	307,368
International Development Enterprises (India) C-5 / 43, Safdarjung Development Area New Delhi 110 016 India	N/A	Non-501(c)(3)	To support the creation of the Center for Innovation to Impact.	400,000
Micro-enterprise Inventor Program of Oregon 5257 NE MLK suite 201 Portland Oregon, 97221 United States	N/A	Non-501(c)(3)	To support the Micro-Enterprise Inventor Program of Oregon during a transition year as it applies for tax-exempt status and hires a managing director to strengthen the organization.	40,000
Sambotha, Inc. c/o Ellis Dillon, 4062 Valeta St #338 San Diego California, 92110 United States	N/A	170(b)(1)(A)(vi) public charity	To further develop technology and markets for Sambotha's three product lines (Isolyak, Yak Dream and Norlha).	262,500
SolarAid Pride Court, 89-82 White Lion Street London N1 9PF, UK United Kingdom	N/A	Non-501(c)(3)	To design, develop prototypes for, and test a solar LED retrofit kit for kerosene lanterns and a low-cost gravity-powered LED light.	135,000

The Lemelson Foundation, 88-0391959
Attachment to Part XV, Line 3b, Grants and Contributions Approved for Future Payment
2009 Form 990-PF

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Foundation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Sustainable Harvest Inc. The Natural Capital Center, 721 NW Ninth Avenue Suite 235 Portland Oregon, 97209 United States	N/A	Non-501(c)(3)	To support Sustainable Harvest's farmer training, technology dissemination and market linkage development program in Tanzania.	600,000
Villgro Innovations Foundation (formerly known as Rural Innovations Network) III Floor, IITM Research Park, Kanagam Road, Taramani Chennai 600 113 India	N/A	Non-501(c)(3)	To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.	1,724,873
Villgro Innovations Foundation (formerly known as Rural Innovations Network) III Floor, IITM Research Park, Kanagam Road, Taramani Chennai 600 113 India	N/A	Non-501(c)(3)	To coordinate and lead the India Recognition and Mentoring Program (RAMP) in partnership with the Indian Institute of Technology, Madras.	480,000
Total				<u>4,849,741</u>

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).

A corporation 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 a corporation 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 and click on e-file for Charities & Nonprofits.

Type or print	Name of Exempt Organization THE LEMELSON FOUNDATION	Employer identification number 88-0391959
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. 45 SW ANKENY STREET, SUITE 200	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. PORTLAND, OR 97204	

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

- | | | |
|---|---|------------------------------------|
| <input 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 checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

PHILIP J. VARNUM

- The books are in the care of ► **45 SW ANKENY STREET, SUITE 200 - PORTLAND, OR 97204**

Telephone No. ► **503-222-2924**

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) . 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 corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010** to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ **X** calendar year **2009** or
- ☐ tax year beginning , and ending .

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

3a 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.	3a	\$	0.
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.	3b	\$	185,086.
c Balance Due. 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.	3c	\$	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).	
Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization		Employer identification number
	THE LEMELSON FOUNDATION		88-0391959
	Number, street, and room or suite no. If a P.O. box, see instructions. 45 SW ANKENY STREET, SUITE 200		For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. PORTLAND, OR 97204		

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

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

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

PHILIP J. VARNUM

- The books are in the care of **45 SW ANKENY STREET, SUITE 200 - PORTLAND, OR 97204**
Telephone No. **503-222-2924** 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) _____. 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 **NOVEMBER 15, 2010.**
- 5 For calendar year **2009**, or other tax year beginning _____, and ending _____.
- 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
ADDITIONAL TIME IS NEEDED TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a 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	\$	0.
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	\$	0.
c Balance Due. 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 **Philip J. Varnum** Title **CPA** Date **8/12/10**

Form 8868 (Rev. 4-2009)