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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , 2010, and ending , 20

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

Name of foundation: James R. Dougherty, Jr. Foundation, Inc.

A Employer identification number: 02-0583552

Number and street (or P O box number if mail is not delivered to street address): Post Office Box 640 | Room/suite

B Telephone number (see page 10 of the instructions): 361-358-3560

City or town, state, and ZIP code: Beeville, Texas 78104-0640

C If exemption application is pending, check here ▶☐

D 1. Foreign organizations, check here ▶☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 6,547,959.

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).)*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☑ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	14,126 54	14,126.54		
	4	Dividends and interest from securities	97,182.30	97,182.30		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	(13,104.45)			
	b	Gross sales price for all assets on line 6a 902,565.62				
	7	Capital gain net income (from Part IV, line 2)		0.00		
	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) (attach schedule)				
	11	Other income (attach schedule)	165,926.47	165,926.47		
	12	**Total.** Add lines 1 through 11	264,130.86	277,235.31		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	21,666.58	14,083.28		7,583.30
	14	Other employee salaries and wages	18,196.10	8,734.13		9,461.97
	15	Pension plans, employee benefits	3,312.30	1,895.98		1,416.32
	16a	Legal fees (attach schedule)	349.50	237 00		112.50
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	10,294.51	8,027.51		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	55.82	27.91		
	22	Printing and publications				
	23	Other expenses (attach schedule)	18,591.67	17,507.14		1,084.53
	24	**Total operating and administrative expenses.** Add lines 13 through 23	72,466.48	50,512.95		19,658.62
	25	Contributions, gifts, grants paid	325,000.00			325,000.00
	26	**Total expenses and disbursements.** Add lines 24 and 25	397,466.48	50,512.95		344,658.62
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(133,335.62)			
	b	**Net investment income** (if negative, enter -0-)		226,722.36		
	c	**Adjusted net income** (if negative, enter -0-)				

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Part II Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets 1	Cash—non-interest-bearing			
2	Savings and temporary cash investments	1,249,654.	1,025,828.	1,027,243.
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶	4,837.	0.	0.
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges	2,600.	333.	333.
10a	Investments—U.S. and state government obligations (attach schedule)	753,232.	50,226.	51,469.
b	Investments—corporate stock (attach schedule)	2,499,124.	2,752,685.	3,195,492.
c	Investments—corporate bonds (attach schedule)	1,191,358.	1,742,045.	1,778,222.
11	Investments—land, buildings, and equipment: basis ▶ 1,943,853.			
	Less: accumulated depreciation (attach schedule) ▶ 1,943,853.	0.	0	495,000.
12	Investments—mortgage loans			
13	Investments—other (attach schedule)			
14	Land, buildings, and equipment: basis ▶ 3,555.			
	Less: accumulated depreciation (attach schedule) ▶ 3,555.	0.	0.	200.
15	Other assets (describe ▶ Accrued Bond Interest)	3,648.	0.	0.
16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,704,453.	5,571,117.	6,547,959.
Liabilities 17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg., and equipment fund	2,133,615.	2,133,615.	
29	Retained earnings, accumulated income, endowment, or other funds	3,570,838.	3,437,502.	
30	**Total net assets or fund balances** (see page 17 of the instructions)	5,704,453.	5,571,117.	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	5,704,453.	5,571,117.	

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	5,704,453.
2	Enter amount from Part I, line 27a	2	(133,336.)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	5,571,117.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	5,571,117.

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	Schedule Attached			
b				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	(13,104.45)
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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 page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col. (c))
2009	347,058.	6,050,862.	0.057357
2008	350,122.	6,337,719.	0.055244
2007	349,125.	6,616,202.	0.052768
2006	328,908.	6,296,705.	0.052235
2005	337,882.	6,169,840.	0.054763

2	**Total** of line 1, column (d)	2	0.272367
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.054473
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	6,276,211.
5	Multiply line 4 by line 3	5	341,884.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,267.
7	Add lines 5 and 6	7	344,151.
8	Enter qualifying distributions from Part XII, line 4	8	344,659.

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 on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ 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 ▶ ☑ and enter 1% of Part I, line 27b	1	2,267.
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	
3	Add lines 1 and 2	3	2,267.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	2,267.
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 2,600.		
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	2,600.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	333.
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ 333. **Refunded** ▶	11	

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?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		✓
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		✓
	If "Yes," attach a detailed description of the activities.			
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*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N	A.
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		✓
	If "Yes," attach the statement required by General Instruction T.			
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?	6	✓	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ Texas			
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*	8b	✓	
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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
	Website address ▶			
14	The books are in care of ▶ Daren R. Wilder Telephone no. ▶ 361-358-3560 Located at ▶ 201 N. Washington, Beeville, Texas ZIP+4 ▶ 78102			
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			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		✓
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b	N.	A
	Organizations relying on a current notice regarding disaster assistance check here ▶☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		✓
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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☑ No If "Yes," list the years ▶ 20 , 20 , 20 , 20			
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 page 22 of the instructions.)	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. ▶ 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)*	3b	N	A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2010?	4b		✓

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☑ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b** — No: ✓

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☑ Yes ☐ No

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

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? **6b** — No: ✓

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** N A

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Schedule Attached				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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 Foundation is not involved with any direct charitable activities. It gives to active tax exempt organizations approved by the I R.S.	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	4,704,377.
b	Average of monthly cash balances	1b	1,167,061.
c	Fair market value of all other assets (see page 25 of the instructions)	1c	500,350.
d	**Total** (add lines 1a, b, and c)	1d	6,371,788.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	6,371,788.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	95,577.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,276,211.
6	**Minimum investment return.** Enter 5% of line 5	6	313,811.

Part XI **Distributable Amount** (see page 25 of the 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	313,811.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	2,267.		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	2,267.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	311,544.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	311,544.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	311,544.

Part XII **Qualifying Distributions** (see page 25 of the 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	344,659.
b	*Program-related investments—total from Part IX-B*	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	***Qualifying distributions.*** *Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4*	4	344,659.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. *Enter 1% of Part I, line 27b (see page 26 of the instructions)*	5	2,267.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	342,392.

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.

Part XIII Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				311,544.
2	Undistributed income, if any, as of the end of 2010:				
a	Enter amount for 2009 only			299,980.	
b	Total for prior years: 20___,20___,20___				
3	Excess distributions carryover, if any, to 2010:				
a	From 2005				
b	From 2006				
c	From 2007				
d	From 2008				
e	From 2009				
f	**Total** of lines 3a through e				
4	Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 344,659.				
a	Applied to 2009, but not more than line 2a			299,980.	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)	44,679.			
d	Applied to 2010 distributable amount				
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	44,679.			
b	Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d	Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e	Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			0.	
f	Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				311,544.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	0.	*		
10	Analysis of line 9:	*Note. Election to Distribute from Corpus Attached.			
a	Excess from 2006				
b	Excess from 2007				
c	Excess from 2008				
d	Excess from 2009				
e	Excess from 2010				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) N/A

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling . . . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter ²/₃ of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

Daren R. Wilder, Post Office Box 640, Beeville, Texas 78104-0640 (361) 358-3560

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

Requests should be made by letter giving information about the organization, its project and the amount requested. A copy of the IRS Determination Letter should also be enclosed.

c Any submission deadlines: There are no fixed times for meetings which are usually held in the Spring and in the Fall The deadline for the Spring Meeting is March 1 and the deadline for the Fall meeting is September 1 Requests received after the deadline are held over for the next meeting.

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

None, except no gifts are made to individuals.

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*				
Schedule Attached				
Total . . . . ▶ 3a				325,000.00
b *Approved for future payment*				
NONE				
Total . . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	14,126.54	
4 Dividends and interest from securities			14	97,182.30	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	(13,104.45)	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a Oil & Gas Royalties			15	165,926.47	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				264,130.86	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 264,130.86

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)
	N.A.

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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.

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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		

Sign Here

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

Karen R. White | 5/16/11 | Treasurer

Signature of officer or trustee | Date | Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part I - Analysis of Revenue and Expenses

Line 11: Other Income

	Col (a)	Col (b)	Col (d)
Oil & Gas Royalties	$165,926.47	$165,926.47	

Line 16(a): Legal Fees

	Col (a)	Col (b)	Col (d)
Amount paid Graves, Dougherty, Hearon & Moody for revision of Certificate of Formation and Bylaws and review of proposed gift to a church	$ 349.50	$ 237.00	$ 112.50

Line 18: Taxes

	Col (a)	Col (b)	Col (d)
Production Taxes on Oil/Gas Royalties	$ 8,027.51	$ 8,027.51	-
Federal Excise Tax	2,267.00	-	-
Total	$ 10,294.51	$ 8,027.51	

Line 23: Other Expenses

	Col (a)	Col (b)	Col (d)
Dues - Council on Foundations	$ 710.00	$ 355.00	$ 355.00
Dues - Conference of Southwest Foundations	500.00	250.00	250.00
Copier & Fax Expense	153.90	38.47	115.43
Office Supplies	348.16	348.16	-
Custodian Fee	14,851.15	14,851.15	-
Postage Expense	485.46	121.36	364.10
Automobile Insurance	160.00	160.00	-
Umbrella Insurance	1,001.00	1,001.00	-
General Liability Insurance	382.00	382.00	-
Total	$ 18,591.67	$ 17,507.14	$ 1,084.53

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part II - Balance Sheets

Line 10(a): Investments - U.S. & State Government Obligations

#	Description	Book Value	Fair Market Value
50M	U.S. T-Notes 5% Due 08/15/11	50,226.	51,469.
	Total	$ 50,226.	$ 51,469.

Line 10(b): Investments - Corporate Stock

#	Description	Book Value	Fair Market Value
700 Sh.	Abbott Laboratories	$ 34,216.	$ 33,537.
1,500 Sh.	Adobe Systems, Inc.	39,340.	46,170.
600 Sh.	AFLAC Corporation	21,582.	33,858.
500 Sh.	American Express Company	20,761.	21,460.
100 Sh.	Apache Corporation	6,829.	11,923.
300 Sh.	Apple, Inc.	29,034.	96,768.
1,000 Sh.	Applied Materials, Inc.	17,302.	14,050.
1,500 Sh.	AT&T, Inc.	37,800.	44,070.
200 Sh.	Baker Hughes, Inc.	9,793.	11,434.
700 Sh.	Baxter International, Inc.	31,880.	35,434.
2,923.994Sh.	Buffalo Small Cap Fund	76,705.	76,638.
600 Sh.	Chevron Corporation	35,903.	54,750.
2,000 Sh.	Cisco Systems, Inc.	44,322.	40,460.
700 Sh.	Colgate Palmolive Company	35,554.	56,259.
2,081.225Sh.	Dodge & Cox International Stock Fund	95,875.	74,321.
1,200 Sh.	Dominion Resources, Inc. Virginia	42,276.	51,264.
400 Sh.	Emerson Electric Company	12,036.	22,868.
400 Sh.	Exxon Mobil Corporation	24,691.	29,248.
1,450 Sh.	Financial Select Sector SPDR	27,094.	23,128.
1,500 Sh.	General Electric Company	54,458.	27,435.
14,783.370Sh.	Glenmede Fund, Inc. - International Port	247,527.	200,758.
10,249.196Sh.	Glenmede Fund, Inc. - Large Cap 100 Port	140,387.	125,655.
300 Sh.	Goldman Sachs Group, Inc.	29,790.	50,448.
80 Sh.	Google, Inc.	35,185.	47,518.
3,429.401Sh.	Harbor Small Cap Value	68,178.	67,182.
600 Sh.	H.J. Heinz Company	23,446.	29,676.
800 Sh.	Hewlett Packard Corporation	24,464.	33,680.
1,200 Sh.	Illinois Tool Works	51,521.	64,080.
1,800 Sh.	Intel Corporation	48,132.	37,854.
400 Sh.	International Business Machines Corporation	43,679.	58,704.

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part II - Balance Sheets

Line 10(b): Investments - Corporate Stock (Continued)

#	Description	Book Value	Fair Market Value
1,000 Sh.	J.P. Morgan Chase & Company	46,140.	42,420.
1,000 Sh.	Johnson & Johnson, Inc.	46,170.	61,850.
797 Sh.	Kellogg Company	36,471.	40,711.
800 Sh.	3M Company	61,132.	69,040.
4,140.787Sh.	Matthews Pacific Tiger FD-IS	100,000.	97,060.
1,000 Sh.	Medtronic, Inc.	52,140.	37,090.
1,300 Sh.	Microsoft Corporation	39,738.	36,283.
400 Sh.	Nucor Corporation	16,626.	17,528.
1,000 Sh.	Omnicom Group	27,870.	45,800.
2,000 Sh.	Oracle Corporation	29,024.	62,600.
900 Sh.	Pepsico, Inc.	43,711.	58,797.
492 Sh.	Pfizer, Inc.	8,743.	8,615.
800 Sh.	Procter & Gamble Company	35,279.	51,464.
200 Sh.	Rio Tinto PLC Spon ADR	5,345.	14,332.
900 Sh.	Schlumberger, LTD.	31,470.	75,150.
500 Sh.	TJX Companies, Inc.	13,705.	22,195.
800 Sh.	Target Corporation	21,387.	48,104.
1,400 Sh.	Texas Instruments, Inc.	40,461.	45,500.
500 Sh.	The Travelers Companies, Inc.	21,385.	27,855.
7,508.242Sh.	Tweedy Browne Global Value Fund	170,999.	178,846.
700 Sh.	United Parcel Service - Class B	47,100.	50,806.
700 Sh.	United Technologies Corporation	34,465.	55,104.
1,000 Sh.	US Bancorp	16,890.	26,970.
2,580.701Sh.	Vanguard Small Cap Index Fund Signal	45,000.	80,853.
1,000 Sh.	Varian Medical Systems, Inc.	36,293.	69,280.
800 Sh.	Waters Corporation	32,769.	62,168.
9,837.565Sh.	William Blair International Growth Fund	248,156.	219,771.
1,400 Sh.	Yum Brands, Inc.	34,456.	68,670.
	Total	$2,752,685.	$3,195,492.

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part II - Balance Sheets

Line 10(c): Investments - Corporate Bonds

#	Description	Book Value	Fair Market Value
50M	Berkshire Hathaway Bond 4.85% Due 01/15/15	$ 53,014.	$ 54,680.
100M	Cisco Systems, Inc. 5.25% Due 02/22/11	100,806.	100,627.
150M	Deutsche Bank AG London 2.375% Due 01/11/13	150,413.	152,213.
150M	General Electric Capital 3.50% Due 08/13/12	153,497.	155,400.
125M	Goldman Sachs Group 5.25% Due 10/15/13	131,827.	135,278.
200M	Hewlett Packard Company 2.25% Due 05/27/11	200,757.	201,730.
50M	Hewlett Packard Company 4.75% Due 06/02/14	52,846	54,784.
50M	J.P. Morgan Chase & Co. Bond 5.75% Due 01/02/13	50,521.	54,178.
125M	Morgan Stanley 5.05% Due 01/21/11	125,187.	125,232.
50M	Oracle Corporation 3.75% Due 07/08/14	51,477.	53,144.
100M	Pfizer, Inc. 4.45% Due 03/15/12	102,818.	104,346.
50M	Shell International Finance 3.25% Due 09/22/15	50,440.	51,363.
50M	Toms River N.J. School District 4.212% Due 07/15/11	50,000.	51,026.
50M	Wal-Mart Stores Bonds 4.125% Dues 02/15/11	49,156.	50,212.
150M	Wal-Mart Stores Bonds 4.55% Due 05/01/13	160,007.	162,021.
200M	Wal-Mart Stores Bonds 4.25% Due 04/15/13	208,130.	214,872.
50M	Walt Disney Company 6.2% Due 06/20/14	51,149.	57,116.
	Total	$1,742,045.	$1,778,222.

Line 11: Investments: Land, Buildings and Equipment

Description	Cost	Accumulated Depreciation/ Depletion	Market Value
Roche "A" Lease R.I. - JRD Interest	$ 520,046.	$ 520,046.	$ 159,127.
Roche "A" Lease R.I. - GTD Interest	59,417.	59,417.	17,404.
Lambert Lease R.I.	1,344,808.	1,344,808.	318,469.
Lambert "B" Lease R.I.	17,996.	17,996.	-
Lambert #2 & #4 Lease R.I.	1,586.	1,586.	-
Totals	$ 1,943,853.	$ 1,943,853.	$ 495,000.

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part II - Balance Sheets

Line 14: Land, Buildings and Equipment

Description	Cost	Accumulated Depreciation/ Depletion	Market Value
Office Equipment	$ 3,555.	$ 3,555.	$ 200.

Line 15: Other Assets

Description	Book Value	Accumulated Amortization	Market Value
Organization Start-up Costs	$ 20,000.	$ 20,000.	$ -
Totals	$ 20,000.	$ 20,000.	$ -

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part IV - Capital Gains & Losses for Tax on Investment Income

		(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
a.	50M	Wells Fargo Company Bond 4.2% Due 01/15/10	P	01/04/05	01/15/10
b.	64M	U.S. T-Notes 4.25% Due 01/15/10 (Inflation Adj)	P	02/05/04	01/20/10
c.	585M	U.S. T-Notes 4.5% Due 05/15/10	P	11/20/07	05/14/10
d.	50	B. P. Capital Markets PLC 5.25% Due 11/07/13	P	01/14/10	06/23/10
e.	50M	U.S. T-Notes 4.125% Due 08/15/10	P	09/02/05	08/16/10
f.	50M	Anheuser Busch Bonds 5.625% Due 10/01/10	P	07/11/05	10/01/10
g.	1315.351Sh	Harbor Small Cap Value Fund	P	Various	11/15/10
h.	300 Sh.	Diageo PLC Sponsored ADR	P	10/19/07	11/08/10
i.	139 Sh.	Transocean, Ltd.	P	11/29/07	11/08/10
j.	7490.946Sh	LTCG-Tweedy Browne Global Value Fund	P	Various	12/31/10

	(e) Gross Sales Price	(f) Depreciation Allowed	(g) Cost or Other Basis	(h) Gain or (Loss)
a.	50,000.00	-	50,000.00	-
b.	64,265.00	-	64,585.61	(320.61)
c.	585,000.00	-	585,000.00	-
d.	46,750.00	-	54,692.66	(7,942.66)
e.	50,000.00	-	50,000.00	-
f.	50,000.00	-	50,000.00	-
g.	25,000.00	-	29,090.18	(4,090.18)
h.	22,345.63	-	26,796.00	(4,450.37)
i.	8,792.99	-	5,505.62	3,287.37
j.	412.00	-	-	412.00
	902,565.62	-	915,670.07	(13,104.45)

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part IV - Capital Gains & Losses for Tax on Investment Income Continued

	(i) F.M.V. as of 12/31/69	(j) Adjusted Basis as of 12/31/69	(k) Excess of Col (i) over Col (j), if any	(l) Gain Col(h) Minus Col(k)
a.				-
b.				(320.61)
c.				-
d.				(7,942.66)
e.				-
f.				-
g.				(4,090.18)
h.				(4,450.37)
i.				3,287.37
j.				412.00
	-	-	-	(13,104.45)

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JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF

EXPENDITURE RESPONSIBILITY REPORT

1. Name and Address of Grantee:

Dougherty Historical Foundation
Post Office Box 640
Beeville, Texas 78104

2. Date and Amount of Gift:

December 11, 2009	$ 20,000.00

3. Purpose of Grant:

To defray the cost of maintaining the Dougherty Homestead at Round Lake as a Museum for the general public for charitable and educational purposes.

4. Amount Spent by Grantee:

$ 20,000.00

Since all of the funds have been spent, this is a final report.

5. No portion of the funds was diverted from the purpose of this grant.

6. Date of Report:

June 30, 2010

02-0583552

JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part VIII: Information about Officers, Directors, Trustees, etc.

(a) Name and Address	(b) Title & Avg. Hours per Week worked	(c) Compensation	(d) Contribution To Employee Benefit Plan	(e) Expenses Acct., Other Allowances
1. Ben F. Vaughan, III Post Office Box 98 Austin, TX 78767-0098	President/Director, as Needed 0.5 hours/week	-	-	-
2. Genevieve Vaughan Post Office Box 2285 Austin, TX 78764-2285	Director, as Needed 0.5 hours/week	-	-	-
3. Beatrice Rossi-Landi 136 E. 64th Street, Apt. 11F New York, NY 10065	Director, as Needed 0.5 hours/week	-	-	-
4. Frances Carr Tapp Post Office Box 60010 Corpus Christi, TX 78466-0010	Secretary/Director, as Needed 0.5 hours/week	-	-	-
5. Rachael Carr Magennis c/o Personal Administrators 3939 Bee Cave Road C-100 Austin, TX 78746	Director, as Needed 0.5 hours/week	-	-	-
6. Rachael Pauley 107-B Brenham Manor, TX 78653	Director, as Needed 0.5 hours/week	-	-	-
7. Daren R. Wilder Post Office Box 640 Beeville, TX 78104-0640	Treasurer, as needed 15 hours/week	21,666.58	-	-
Total		21,666.58	-	-

02-0583552

JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part XIII - Undistributed Income

Line 4(c):

Election Under Section 4942 (d)(2)

This Foundation elects under the provisions of Section 4942 (d)(2), to treat $44,679.00 of the excess of qualifying distributions made in 2010 over undistributed income for 2010 as a distribution out of Corpus.

Daren R Wilder

Daren R. Wilder
Treasurer

02-0583552

JAMES R. DOUGHERTY, JR. FOUNDATION, INC.

2010 Form 990-PF Part XV Supplementary Information

Line 3(a): Grants and Contributions Paid During the Year

	Recipient	Purpose	Amount
1.	Abraham's Vision of Peace, Inc. 270 Chestnut Street, Suite 202 Redwood City, California 94063	For the Vision Program and/or for operating expenses	5,000.00
2.	Admission Control dba College Forward Post Office Box 142308 Austin, Texas 78714-2308	For operating expenses	1,000.00
3.	Alliance of Community Trainers, Inc. Post Office Box 1286 Austin, Texas 78767-1286	This is an unrestricted grant made with the non-binding that the funds be used by Earth Activist Training of San Francisco, California to help fund work trade and scholarships for the residential programs and/or for operating expenses	8,000.00
4.	The Ann Richards School Foundation Post Office Box 684746 Austin, Texas 78768-4746	To help provide critical support to students on the path to college and/or for operating expenses	1,000.00
5.	Any Baby Can of Austin, Inc. dba Any Baby Can Child and Family Resource Center 1121 East 7th Street Austin, Texas 78702	For operating expenses	500.00
6.	Any Baby Can of Austin, Inc. dba Any Baby Can Child and Family Resource Center 1121 East 7th Street Austin, Texas 78702	For operating expenses	1,000.00
7.	The Arc of the Capital Area 2818 San Gabriel Austin, Texas 78705	For the Juvenile Justice Services Program and/or for operating expenses	1,000.00
8.	Austin Child Guidance Center 810 West 45th Street Austin, Texas 78751	For operating expenses	500.00

2010 Form 990-PF Part XV Supplementary Information

Line 3(a): Grants and Contributions Paid During the Year

	Recipient	Purpose	Amount
9.	Austin Recovery, Inc. 8402 Cross Park Drive Austin, Texas 78754	For operating expenses	500.00
10.	Bayanihan Foundation Worldwide 2020 North California Avenue, Suite 7 Box 147 Chicago, Illinois 60647	For operating expenses	5,000.00
11.	Bee County Junior Livestock and Homemakers Show, Inc. Post Office Box 252 Beeville, Texas 78104-0252	To help support Bids For Kids	1,000.00
12.	BookSpring Post Office Box 143147 Austin, Texas 78714-3147	To help support BookSpring's RIF Books for Ownership program and/or for operating expenses	500.00
13.	The Botanical and Nature Institute of South Texas, Inc. dba South Texas Botanical Gardens & Nature Center 8545 South Staples Street Corpus Christi, Texas 78413	To help with the expansion and enhancement of the environmental educational programming and/or for operating expenses	1,500.00
14.	Boys Club of Mount Kisco, Inc. dba Boys & Girls Club of Northern Westchester 351 Main Street Mt. Kisco, New York 10549	For the Mount Kisco Fun Club Program and/or for operating expenses	2,500.00
15.	Boys & Girls Club of the Austin & Travis County, Inc. dba Boys & Girls Clubs of the Austin Area 5407 North Interstate 35, Suite 400 Austin, Texas 78723	For operating expenses	1,000.00
16.	Boys & Girls Club Beeville, Inc. Post Office Box 131 Beeville, Texas 78104-0131	To help support quality summer programs and/or for operating expenses	2,500.00

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	Recipient	Purpose	Amount
17.	Boys & Girls Club of Beeville, Inc. Post Office Box 131 Beeville, Texas 78104-0131	To help support quality programs for the 2010-2011 fiscal year and/or for operating expenses	1,000.00
18.	Boys & Girls Club of Live Oak County Post Office Box 1048 Three Rivers, Texas 78071-1048	For operating expenses	12,000.00
19.	Boys & Girls Club of Live Oak County Post Office Box 1048 Three Rivers, Texas 78071-1048	For operating expenses	7,000.00
20.	Camp Aranzazu, Inc. 5420 FM 1781 Rockport, Texas 78382-7622	To help support campers and/or for operating expenses	2,000.00
21.	Capital Area Food Bank of Texas, Inc. 8201 South Congress Avenue Austin, Texas 78745-7305	For the Central Texas Food Rescue Program and/or for operating expenses	1,500.00
22.	Capital Area Food Bank of Texas, Inc. 8201 South Congress Avenue Austin, Texas 78745-7305	For the Central Texas Food Rescue Program and/or for operating expenses	1,500.00
23.	Caritas of Austin Post Office Box 1947 Austin, Texas 78767-1947	For operating expenses	4,500.00
24.	Caritas of Austin Post Office Box 1947 Austin, Texas 78767-1947	For operating expenses	6,000.00
25.	Catholic Diocese of Corpus Christi Post Office Box 2620 Corpus Christi, Texas 78403-2620	For general operating expenses of the Mission of Mercy mobile healthcare unit	500.00
26.	Catholic Relief Services Major Gift Unit Post Office Box 17529 Baltimore, Maryland 21298-8180	For help with the Haiti earthquake and/or for operating expenses	1,000.00

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	Recipient	Purpose	Amount
27.	Catholic Relief Services Post Office Box 17529 Baltimore, Maryland 21298-7529	This is an unrestricted grant made with the non-binding suggestion that the funds be used for Eureka for Africa in Burkina Faso, Africa for the project "Literacy / Training Centre for Women Self-Dependence" and/or for operating expenses	5,000.00
28.	Catholic Social Services of Laredo, Inc. Post Office Box 3305 Laredo, Texas 78044-3305	To help support the Emergency and Poverty Assistance program	1,000.00
29.	Chief Seattle Club 410 2nd Avenue, Extension South Seattle, Washington 98104	For operating expenses	500.00
30.	Children's Medical Center Foundation of Central Texas 4900 Mueller Boulevard Austin, Texas 78723-9904	For operating expenses	1,000.00
31.	Christ Memorial Chapel 9 East Lyon Farm Drive Greenwich, Connecticut 06831	These funds are provided in memory of Mrs. Caroline Baxter Pauley	11,500.00
32.	Christ Memorial Chapel 103 Palmetto Trail Hobe Sound, Florida 33455	These funds are provided in memory of Mrs. Caroline Baxter Pauley	14,000.00
33.	CHRISTUS Spohn Health System Development Foundation 600 Elizabeth Street Corpus Christi, Texas 78404	To help support the CyberKnife Stereotactic Radiosurgery System and/or for operating expenses	2,500.00

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	Recipient	Purpose	Amount
34.	Coalition Against Trafficking in Women Post Office Box 7427 Jaf Station New York, New York 10116-7427	This is an unrestricted grant made with the non-binding suggestion that the funds be used by the Buklod Center, Inc. in West Bajac-Bajac, Olongapo City, Philippines for the project entitled "Alternative Learning System" and/or for operating expenses	1,500.00
35.	Corpus Christi Hope House, Inc. 658 Robinson Street Corpus Christi, Texas 78404	For operating expenses	3,500.00
36.	Court Appointed Special Advocates (CASA) of Travis County, Inc. 7701 North Lamar Boulevard, Suite 301 Austin, Texas 78752	For the Child Advocacy program	500.00
37.	Cristo Rey Catholic Church 2215 East Second Street Austin, Texas 78702	For the Si Se Puede Learning Center	2,000.00
38.	The CRUDEM Foundation Post Office Box 804 Ludlow, Massachusetts 01056-0804	For the Hopital Sacre Coeur in Haiti and/or for operating expenses	1,000.00
39.	Doctors Without Borders USA, Inc. 333 Seventh Avenue, 2nd Floor New York, New York 10001-5004	To help bring medical and humanitarian relief around the world	2,700.00
40.	Dougherty Historical Foundation Post Office Box 640 Beeville, Texas 78104-0640	For operating expenses	20,000.00
41.	Dougherty Historical Foundation Post Office Box 640 Beeville, Texas 78104-0640	For operating expenses	20,000.00

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Line 3(a): Grants and Contributions Paid During the Year

	Recipient	Purpose	Amount
42.	Down Home Ranch, Inc. 20250 FM 619 Elgin, Texas 78621	For operating expenses	500.00
43.	Emancipet, Inc. Post Office Box 6396 Austin, Texas 78762-6396	To help purchase a new Mobile Spay/Neuter Clinic and/or for operating expenses	4,000.00
44.	Family Eldercare, Inc. 2210 Hancock Drive Austin, Texas 78756	For operating expenses	1,000.00
45.	Family Eldercare, Inc. 2210 Hancock Drive Austin, Texas 78756	For operating expenses	1,500.00
46.	Food Bank of Corpus Christi 826 Krill Street Corpus Christi, Texas 78408-2515	For operating expenses	1,500.00
47.	Food Bank of Corpus Christi 826 Krill Street Corpus Christi, Texas 78408-2515	To help support the Kids Cafe and/or for operating expenses	1,500.00
48.	Foundation Communities, Inc. 3036 South First Street Austin, Texas 78704	For operating expenses	1,000.00
49.	Foundation Communities, Inc. 3036 South First Street Austin, Texas 78704	For operating expenses	500.00
50.	Foundation Fighting Blindness, Inc. 7168 Columbia Gateway Drive, Suite 100 Columbia, Maryland 21046	For Gene Therapy Research and/or for operating expenses	1,750.00
51.	Friends of the Corpus Christi Museum of Science and History 1900 North Chaparral Street Corpus Christi, Texas 78401	For operating expenses	1,000.00

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	Recipient	Purpose	Amount
52.	Friends of WEECE, Inc. 21 Boylston Street Jamaica Plain, Massachusetts 02130	This is an unrestricted grant made with the non-binding suggestion that the funds be used by the Women's Education and Economic Center (WEECE) of Tanzania, Africa to help with the construction of the Nurse and Doctor's Residential House at the Nganjoni Health Clinic	5,000.00
53.	Good Samaritan Rescue Mission Post Office Box 65 Corpus Christi, Texas 78403-0065	For operating expenses	2,000.00
54.	The Haitian Health Foundation, Inc. 97 Sherman Street Norwich, Connecticut 06360	To help the poor in Haiti and/or for operating expenses	7,500.00
55.	Health Advocates For Older People, Inc. 593 Park Avenue New York, New York 10065	To help support the Healthy Aging Program and/or for operating expenses	250.00
56.	Heifer Project International 1 World Avenue Little Rock, Arkansas 72202	For operating expenses	1,000.00
57.	Heifer Project International 1 World Avenue Little Rock, Arkansas 72202	For operating expenses	1,500.00
58.	Helping Hand Home for Children 3804 Avenue B Austin, Texas 78751	For operating expenses	1,000.00
59.	Hill Country Youth Ranch Post Office Box 67 Ingram, Texas 78025-9986	For general operating expenses	1,000.00

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Line 3(a): Grants and Contributions Paid During the Year

	Recipient	Purpose	Amount
60.	Infact dba Corporate Accountability International 10 Milk Street, Suite 610 Boston, Massachusetts 02108	For the Challenging Corporate Control of Water Campaign and/or for operating expenses	500.00
61.	Integrated Development Society, Inc. Post Office Box 2308 Scottsbluff, Nebraska 69363-2308	To help purchase school uniforms for underprivileged scheduled castes children in southern India and/or for operating expenses	500.00
62.	International Center - New Forests Project 1025 Vermont Avenue, NW, Suite 300 Washington, D.C. 20005	For operating expenses	2,000.00
63.	Island Dolphin Care, Inc. 150 Lorelane Place Key Largo, Florida 33037	For operating expenses	1,000.00
64.	KOLO: Women's Cross Cultural Collaboration 7638 58th Avenue NE Olympia, Washington 98516	This is an unrestricted grant made with the non-binding suggestion that the funds be used by International Academy HAGIA in Winzer, Germany for a Special Week Long Seminar on Matriarchal Societies	9,000.00
65.	The Lambi Fund of Haiti Post Office Box 18955 Washington, DC 20036-8955	1.) $3,000.00 - to help support the Grassroots Environmental Program; and 2.) $5,000.00 - to help support the Lambi Fund Earthquake Fund and/or for operating expenses	8,000.00
66.	Last Chance Forever/The Bird of Prey Conservancy Post Office Box 460993 San Antonio, Texas 78246-0993	To help support the rehabilitation and release of injured and orphaned birds of prey	500.00

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	Recipient	Purpose	Amount
67.	Livin the Music, Inc. 311 Shell Beach Drive Lake Charles, Louisiana 70601	For operating expenses	10,000.00
68.	MADRE, Inc. 121 West 27th Street, # 301 New York, New York 10001	For Healing Haiti, Healing Ourselves Project in Haiti	5,000.00
69.	Manor Youth Association Post Office Box 219 Manor, Texas 78653-0219	For operating expenses	3,000.00
70.	Manos de Cristo, Inc. 4911 Harmon Avenue Austin, Texas 78751	For operating expenses	1,000.00
71.	Marywood - Marywood Children and Family Services 6225 East Highway 290 Austin, Texas 78723	For operating expenses	500.00
72.	Meals on Wheels and More, Inc. 3227 East 5th Street Austin, Texas 78702-4907	For operating expenses	1,000.00
73.	Memorial Sloan-Kettering Cancer Center 1275 York Avenue New York, New York 10065	To help with breast cancer research and/or for operating expenses	2,000.00
74.	Mobile Loaves & Fishes, Inc. 903 South Capital of Texas Highway Austin, Texas 78746	For operating expenses	500.00
75.	National Wildlife Federation South Central Regional Center 44 East Avenue, Suite 200 Austin, Texas 78701	To help support the Texas Living Waters work	5,000.00

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	Recipient	Purpose	Amount
76.	New Radio & Performing Arts, Inc. 124 Bourne Street Roslindale, Massachusetts 02131-2202	This is an unrestricted grant made with the non-binding suggestion that the funds be used by Women's International News Gathering Service (WINGS) to produce and distribute radio programs and/or operating expenses	3,000.00
77.	New Radio & Performing Arts, Inc. 124 Bourne Street Roslindale, Massachusetts 02131-2202	This is an unrestricted grant made with the non-binding suggestion that the funds be used by Women's International News Gathering Service (WINGS) for website development, to produce and distribute radio programs and/or for operating expenses	5,000.00
78.	Prevent Child Abuse Texas 13740 Research Boulevard, #R-4 Austin, Texas 78750	To help support a training program for child-care providers and teachers and/or for operating expenses	3,000.00
79.	Primarily Primates Post Office Box 207 San Antonio, Texas 78291-0207	For operating expenses	100.00
80.	St. Edward's University, Inc. 3001 South Congress Avenue Austin, Texas 78704-6489	For the College Assistance Migrant Program (CAMP)	2,000.00
81.	St. Philip's Episcopal School 105 North Adams Street Beeville, Texas 78102	To help purchase playground equipment, to help purchase educational materials and/or for operating expenses	2,500.00
82.	St. Philip's Episcopal School 105 North Adams Street Beeville, Texas 78102	To help purchase new educational materials and/or for operating expenses	2,900.00

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	Recipient	Purpose	Amount
83.	The Salvation Army Post Office Box 2507 Corpus Christi, Texas 78403-2507	To help fund Project Bridge for Families and/or for operating expenses	2,000.00
84.	San Angelo Saddle Club, Inc. 2031 Shahan Road San Angelo, Texas 76904	This is an unrestricted grant made with the non-binding suggestion that the funds be used for the San Angelo Saddle Club Equestrian 4H for operating expenses for the kids in memory of Mrs. Caroline (Biddy) Baxter Pauley	9,000.00
85.	San Angelo Saddle Club, Inc. 2031 Shahan Road San Angelo, Texas 76904	This is an unrestricted grant made with the non-binding suggestion that the funds be used for the San Angelo Saddle Club Equestrian 4H for operating expenses for the kids in memory of Mrs. Caroline (Biddy) Baxter Pauley	5,500.00
86.	San Juan Diego Catholic High School 800 Herndon Lane Austin, Texas 78704-5314	For operating expenses	1,000.00
87.	San Juan Diego Catholic High School 800 Herndon Lane Austin, Texas 78704	For the "Fund-A-Saint" program and/or for operating expenses	2,000.00
88.	Save Venice, Inc. 1104 Lexington Avenue, 4C New York, New York 10075	To help underwrite the restoration of the Church of San Sebastiano	5,000.00
89.	Solomon R. Guggenheim Foundation 1071 Fifth Avenue New York, New York 10128	To help support an education program related to the Peggy Guggenheim Collection and/or for operating expenses	6,800.00

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	Recipient	Purpose	Amount
90.	Southern Brooks Volunteer Fire Department, Inc. Post Office Box 57 Encino, Texas 78353-0057	For operating expenses	500.00
91.	Southern Poverty Law Center 400 Washington Avenue Montgomery, Alabama 36104	For operating expenses	500.00
92.	SpiritHorse Therapeutic Riding Center 1960 Post Oak Drive Corinth, Texas 76201	For operating expenses	1,000.00
93.	Texas RioGrande Legal Aid, Inc. 300 South Texas Boulevard Weslaco, Texas 78596	For operating expenses	1,000.00
94.	Texas RioGrande Legal Aid, Inc. 300 South Texas Boulevard Weslaco, Texas 78596	For operating expenses	500.00
95.	Texas State Aquarium 2710 North Shoreline Corpus Christi, Texas 78402-1097	To help with the expansion and renovation of the Aquarium's playground and/or for operating expenses	500.00
96.	Trinity Center 302 East 7th Street Austin, Texas 78701	To help support the Women to Women program and/or for operating expenses	500.00
97.	University of Texas - Institute for Classical Archaeology 3925 West Braker Lane, Room 1.406 Austin, Texas 78759	This is an unrestricted grant made with the non-binding suggestion that the funds be used by Dr. Zorella in Italy to help study the philosophical works of 20th century Italian linguistics experts	9,500.00

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Line 3(a): Grants and Contributions Paid During the Year

	Recipient	Purpose	Amount
98.	University of Texas - Institute of Classical Archaeology 3925 West Braker Lane, Room 1.406 Austin, Texas 78759	This is an unrestricted grant made with the non-binding suggestion that the funds be used by Dr. Zorella in Italy to help study the philosophical works of 20th century Italian linguistics experts	11,000.00
99.	The University of Texas at Austin Marine Science Institute 750 Channel View Drive Port Aransas, Texas 78373-5015	For help with steroid hormone membrane receptors and how they influence cancer cell survival and/or for operating expenses	8,500.00
100.	The Women's Home 607 Westheimer Houston, Texas 77006-3915	To help provide vital support services	2,000.00
101.	Workers Defense Project Post Office Box 6423 Austin, Texas 78762-6423	For the Workplace Justice Program and/or for operating expenses	500.00
	Total		$ 325,000.00

None of the above are individuals. All are public organizations except:

(1) Dougherty Historical Foundation, which received a grant of $20,000.00 on May 17, 2010;

(2) Dougherty Historical Foundation, which received a grant of $20,000.00 on December 10, 2010;

Expenditure Responsibility Agreements were signed with these organizations.