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 07-01 , 2010, and ending 06-30 , 20 11

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: L.P. & TERESA ANDERSON FOUNDATION

A Employer identification number: 81-0479060

Number and street (or P O box number if mail is not delivered to street address): PO BOX 190

Room/suite:

B Telephone number (see page 10 of the instructions): (406)232-3920

City or town, state, and ZIP code: MILES CITY, MT 59301

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) ▶ $ 455,908

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				
	4	Dividends and interest from securities	12,663	12,663		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	(8,346)			
	b	Gross sales price for all assets on line 6a 71,605				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) STM106	1,311			
	12	**Total.** Add lines 1 through 11	5,628	12,663		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule) STM108				
	b	Accounting fees (attach schedule) STM109	3,834	2,556		1,278
	c	Other professional fees (attach schedule)	2,265	1,510		755
	17	Interest STM110				
	18	Taxes (attach schedule) (see page 14 of the instructions)	67		67	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	2,487	1,659		828
	21	Travel, conferences, and meetings	68	34		34
	22	Printing and publications STM103				
	23	Other expenses (attach schedule)	1,451	242		173
	24	**Total operating and administrative expenses.** Add lines 13 through 23	10,172	6,001	67	3,068
	25	Contributions, gifts, grants paid	23,900			23,900
	26	**Total expenses and disbursements.** Add lines 24 and 25	34,072	6,001	67	26,968
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	(28,444)			
	b	**Net investment income** (if negative, enter -0-)		6,662		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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EEA

Form 990-PF (2010)

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Part II		**Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	26,938	16,050	16,050
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ 1,311			
		Less allowance for doubtful accounts ▶		1,311	1,311
	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	250	183	183
	10a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule) STM137	434,425	403,230	438,364
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	461,613	420,774	455,908
Liabilities	17	Accounts payable and accrued expenses		405	
	18	Grants payable	20,300	7,500	
	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)	20,300	7,905	
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	441,313	412,869	
	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			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	441,313	412,869	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	461,613	420,774	

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	441,313
2	Enter amount from Part I, line 27a	2	(28,444)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	412,869
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	412,869

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 (yr , mo , day)	(d) Date sold (yr , mo day)
1a	630 SH CLAVERT GLOBAL ALTERN ENERGY	P	2009-06-26	2010-11-19
b	4787 SH CALVERT GLOBAL ALTERN ENERG	P	2009-06-26	2010-11-29
c	136 SH 1ST EAGLE OVERSEAS FUND	P	2009-06-29	2011-03-11
d	1148 SH INCOME FUND OF AMERICA	P	2003-10-17	2011-05-17
e	291 SH WASHINGTON MUTUAL	P	2003-10-17	2010-11-02

	(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	5,004		5,817	(813)
b	36,089		44,183	(8,094)
c	3,004		2,325	679
d	20,004		19,823	181
e	7,504		4,804	2,700

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				(813)
b				(8,094)
c				679
d				181
e				2,700

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	(8,346)
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	23,067	424,380	0.054355
2008	9,736	404,708	0.024057
2007	26,201	625,108	0.041914
2006	26,000	669,461	0.038837
2005	32,085	617,797	0.051935

2 **Total** of line 1, column (d)	2	0.211098
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	0.04222
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	433,328
5 Multiply line 4 by line 3	5	18,295
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	67
7 Add lines 5 and 6	7	18,362
8 Enter qualifying distributions from Part XII, line 4	8	26,968

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	67
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	67
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	67
6	Credits/Payments				
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	250		
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	250
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	183
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ 183 **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		X
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		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		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?	6		X
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ MT			
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	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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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		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 ▶ N/A

14 The books are in care of ▶ SANDRA K ANDERSON Telephone no ▶ 406-232-3920

Located at ▶ PO BOX 190 MILES CITY, MT ZIP+4 ▶ 59301

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

			Yes	No
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		X
	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		
	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		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 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 ▶ ________ , 2007 , ________ , 2009			
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		X
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? ☐ 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		
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 2010?	4b		X

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**

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: X

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**

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
SANDRA K ANDERSON PO BOX 190 MILES CITY, MT 59301	PRESIDENT 2	STMA01 0	0	0
JEFFREY A HUNNES PO BOX 1977 BILLINGS, MT 59101	SECRETARY 1	STMA02 0	0	0
JOHN A TOOKE PO BOX 1134 MILES CITY, MT 59301	TREASURER 1	STMA03 0	0	0

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
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 N/A	0
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	
2	
All other program-related investments See page 24 of the instructions 3 STM142	0
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	432,080
b	Average of monthly cash balances	1b	7,437
c	Fair market value of all other assets (see page 25 of the instructions)	1c	1,311
d	**Total** (add lines 1a, b, and c)	1d	440,828
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	0
3	Subtract line 2 from line 1d	3	440,828
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	7,500
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	433,328
6	**Minimum investment return.** Enter 5% of line 5	6	21,666

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	21,666
2a	Tax on investment income for 2010 from Part VI, line 5	2a	67		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	253		
c	Add lines 2a and 2b			2c	320
3	Distributable amount before adjustments Subtract line 2c from line 1			3	21,346
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	21,346
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	21,346

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	26,968
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	26,968
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	67
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	26,901

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					21,346
2	Undistributed income, if any, as of the end of 2010					
a	Enter amount for 2009 only				911	
b	Total for prior years 2004, 2006,			39,088		
3	Excess distributions carryover, if any, to 2010					
a	From 2005					
b	From 2006	1,337				
c	From 2007					
d	From 2008					
e	From 2009					
f	**Total** of lines 3a through e		1,337			
4	Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 26,968					
a	Applied to 2009, but not more than line 2a				911	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)			4,096		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)					
d	Applied to 2010 distributable amount					21,346
e	Remaining amount distributed out of corpus		615			
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		1,952			
b	Prior years' undistributed income Subtract line 4b from line 2b			34,992		
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			34,992		
e	Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions					
f	Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011					
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		1,952			
10	Analysis of line 9					
a	Excess from 2006	1,337				
b	Excess from 2007					
c	Excess from 2008					
d	Excess from 2009					
e	Excess from 2010	615				

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

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

990APP

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient 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 SCHEDULE ATTACHED				16,400
Total ▶ 3a				16,400
b Approved for future payment SEE SCHEDULE ATTACHED				7,500
Total ▶ 3b				7,500

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a N/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					
4 Dividends and interest from securities					
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					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)					

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

(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)
1A	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)		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

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

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

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

▶ John R. Toole, 11/14/11 ▶ Treas

Signature of officer or trustee Date Title

Paid Preparer Use Only

Print/Type preparer's name Mary L Partridge	Preparer's signature Mary L. Partridge	Date 11-14-2011	Check ☒ if self-employed	PTIN
Firm's name ▶ Mary L Partridge CPA			Firm's EIN ▶	
Firm's address ▶ 615 Main St POB 302 Miles City MT 59301			Phone no 406-874-3500	

L P AND TERESA ANDERSON FOUNDATION
ATTACHMENT TO FORM 990-PF
FISCAL YEAR ENDED JUNE 30, 2011
TIN 81-0479060

PART XV - SUPPLEMENTARY INFORMATION--

Grant Awards and Contributions Paid During the Year or Approved for Future Payment

Line 3(a) - Paid during the year

GRANT AWARDS AND CONTRIBUTIONS FUNDED

Name and Address	Foundation Status	Area of Interest	Purpose of Contribution	Amount
All awards and contributions approved and moneys paid by June 30, 2011 for the Fiscal Year.				
Developmental Educational Assistance Prc (DEAP) Custer, Rosebud & Prairie Counties in MT	501(c)(3)	Social Services	On going Program Support Senior Caregiver Respite Program	7,500
Eastern Montana CASA/GAL Miles City, MT	501(c)(3)	Social Services/ Youth at Risk	Capacity Building & Recruitment Project	5 000
Mt Dept of Justice Miles City, MT	Gov't Agency	Social Services/ Youth Services	Southeasten MT Prescription Drug Abuse Media Campaign	3,000
		Total - Grants Awarded during Fiscal Year		15,500
Discretionary Contributions				
Betty Stabio Memorial Rosebud County Health Foundation Rosebud, MT	501(c)(3)	Social Services	On going Program Support	100
Archie Stabio Memorial Rosebud County Health Foundation Rosebud, MT	501(c)(3)	Social Services	On going Program Support	100
Bill Norsby Memorial Miles City Area Boy Scouts Miles City Area Girl Scouts Miles City, MT	501(c)(3)	Youth Programming	On going Program Support	100 100
Gladys Cain Memorial Range Riders Museum Miles City, MT	501(c)(3)	Social Services	Pioneer Home Support	500
		Total - Discretionary Contribution Funding		900
	Total-- Grant Awards and Contributions Paid During Fiscal Year			16,400

Line 3(b) - Approved for Future Payment

Grant approved for the FY ending June 30, 2011, and money set aside for payment
Grant paid within 2 1/2 months after end of fiscal year

Name and Address	Foundation Status	Area of Interest	Purpose of Contribution	Amount
Fitch Foumdation of Montana Miles City, MT	501(c)(3)	Social Services/ Youth Services	Brett Fitch Memorial Skate Park	7,500
	Total-- Grant Awards and Contributions Funded During Fiscal Year			23,900

	Federal Supporting Statements	**2010** PG 01
Name(s) as shown on return L.P. & TERESA ANDERSON FOUNDATION		Your Social Security Number 81-0479060

FORM 990PF, PART XV, LINE 2
APPLICATION SUBMISSION INFORMATION

990APP

GRANT PROGRAM
SEE GRANT GUIDELINES

APPLICANT NAME
SANDRA K ANDERSON

ADDRESS
PO BOX 190 MILES CITY MT 59301

TELEPHONE
406-232-3920

FORM & CONTENT
IN ORDER TO BE CONSIDERED, THE ORGANIZATION IS ASKED TO PLEASE CONTACT THE FOUNDATION FOR THE GRANT APPLICATION AND GUIDELINES. THE APPLICATION INCLUDES THE REQUIREMENT OF A CONCISE PROPOSAL NARRATIVE. THIS NARRATIVE MUST INCLUDE THE ORGANIZATION'S READINESS TO COMPLETE THE PROJECT. THE GUIDELINES ARE ATTACHED TO THIS RETURN OR MAY BE REQUESTED FROM ADDRESS ABOVE.

SUBMISSION DEADLINE
SEPTEMBER 1 AND MARCH 1

RESTRICTIONS ON AWARD
RESTRICTED TO TAX EXEMPT ORGANIZATIONS OPERATING IN MONTANA WITH PREFERENCE GIVEN TO MILES CITY & CUSTER COUNTY. AREAS OF INTEREST--YOUTH PROGRAMS WHICH INCLUDE YOUTHS AT RISK, SOCIAL SERVICE PROGRAMS, HISTORICAL PRESERVATION PROGRAMS, AND DISASTER VICTIM RELIEF.

Federal Supporting Statements

2010 PG 01

Name(s) as shown on return
L.P. & TERESA ANDERSON FOUNDATION

FEIN
81-0479060

FORM 990PF, PART II, LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
CALVERT GLOBAL ALERNT ENGY C	50,000		
1ST EAGLE OVERSEAS FUND C	53,480	89,132	109,348
INCOME FUND OF AMERICA C	140,734	127,442	126,052
INTL GROWN INCOME C	54,903	57,052	73,061
WASHINGTON MUTUAL INV FUND C	135,308	129,604	129,903
TOTALS	434,425	403,230	438,364

PG 01
STATEMENT #142

FORM 990PF, PART IX-B, LINE 3
ALL OTHER PROGRAM-RELATED INVESTMENTS

DESCRIPTION	AMOUNT
NONE	0

PG01

FORM 990PF, PART VIII
COMPENSATION EXPLANATION

NAME
SANDRA K ANDERSON

EXPLANATION
SERVES WITHOUT COMPENSATION

	Federal Supporting Statements	2010 PG01
Name(s) as shown on return L.P. & TERESA ANDERSON FOUNDATION		FEIN 81-0479060

FORM 990PF, PART VIII
COMPENSATION EXPLANATION

NAME
JEFFREY A HUNNES

EXPLANATION
SERVES WITHOUT COMPENSATION

PG01

FORM 990PF, PART VIII
COMPENSATION EXPLANATION

NAME
JOHN A TOOKE

EXPLANATION
SERVES WITHOUT COMPENSATION

Federal Supporting Statements

2010 PG 01

Name(s) as shown on return: L P. & TERESA ANDERSON FOUNDATION

Your Social Security Number: 81-0479060

STATEMENT #103

FORM 990PF, PART I, LINE 23 - OTHER EXPENSES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
DUES	65	0	0	0
INSURANCE	971	0	0	0
MISCELLANEOUS EXPENSES	176	117	0	59
OFFICE SUPPLIES	121	60	0	61
POSTAGE	105	52	0	53
INVESTMENT SERVICE CHARGES	13	13	0	0
TOTALS	1,451	242	0	173

PG 01

STATEMENT #106

FORM 990PF, PART I, LINE 11 - OTHER INCOME SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME
WORKERS COMP AUDIT CREDITS	1,311	0	0
TOTALS	1,311	0	0

Federal Supporting Statements

2010 PG 01

Name(s) as shown on return
L.P. & TERESA ANDERSON FOUNDATION

Your Social Security Number
81-0479060

FORM 990PF, PART I, LINE 16(B) - ACCOUNTING FEES SCHEDULE

STATEMENT #108

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ACCOUNTING FEES	3,834	2,556	0	1,278
TOTALS	3,834	2,556	0	1,278

PG 01
STATEMENT #109

FORM 990PF, PART I, LINE 16(C) - OTHER PROFESSIONAL FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
BOOKKEEPING & SECRETARIAL SERV	2,265	1,510	0	755
TOTALS	2,265	1,510	0	755

PG 01
STATEMENT #110

FORM 990PF, PART I, LINE 18 - TAXES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FEDERAL TAX	67	0	67	0
TOTALS	67	0	67	0

L. P. AND TERESA ANDERSON FOUNDATION

GRANT APPLICATION — GUIDELINES & PROCEDURES

Thank you for your interest in the L. P. AND TERESA ANDERSON CHARITABLE FOUNDATION. We are pleased to offer you our GRANT APPLICATION GUIDELINES AND PROCEDURES and also welcome interested others to request them. We value community involvement and are honored to have the opportunity to join with charitable organizations in shared goals for the betterment of our communities.

BACKGROUND / MISSION

The L. P. and Teresa Anderson Foundation was founded in 1993 in loving memory of Teresa Anderson in order for the family to contribute to the community where L. P. and Teresa Anderson grew up and were afforded opportunities to raise their family and build their businesses.

The Anderson Foundation is designed to grant financial support to selected community projects submitted by eligible tax-exempt organizations serving Montana with preference given to Miles City and Custer County. The Foundation wishes to stimulate proposals for innovative and effective solutions to local needs and problems; with the potential for leaving an ongoing impact on the development and economics of the local community; submitted by charitable organizations having the capacity for successful implementation and management.

Of special interest to the Foundation are charitable projects which address the positive development of youth; extend assistance and access to those in need with goals leading towards self-sufficiency; preserve the historical heritage of the local area; or provide disaster and emergency relief.

WHAT WE FUND

The Foundation plans to grant approximately $15,000 - 25,000 annually in interest income. Grant awards have generally ranged between $500 up to $5,000, although we accept applications for up to $7,500 where the scope is very comprehensive and the impact extensive.

Grants for all our Areas of Interest are ordinarily made for these three general purposes:

- As start-up funding for new programs or new special projects that address priority needs or problems (may include planning efforts)
- As expansion funding to enable successful programs or projects to serve broader populations
- As funding to strengthen the existing operations or projects of small and moderate sized nonprofit organizations that are providing exemplary services

Whenever possible, we will favor 1) first-time requests 2) from smaller organizations which demonstrate: a) Excellence in providing services but are not yet adequately funded; and b) Predominant or full use of requested grant funds for direct services rather than administration.

Pending available funds, repeat requests from organizations will be considered as a second priority to new applicants. To qualify, such an application needs to be for a new and different project or program; expansion to a new population; or a new and different phase of program or organizational development.

SELECTION CRITERIA

Our SELECTION CRITERIA are used to evaluate applications for selection and funding amounts. They are integrated into the Proposal Narrative section of this application for applicants to address accordingly.

AREAS OF INTEREST

Due to the limitations of the Foundation's resources and the desire to maximize potential impact, we saw a need to focus our grantmaking on the particular interests of the Founders. Thus, we generally accept applications which address one or more of the Areas of Interest outlined below. We also welcome comments and suggestions regarding future priorities for our Foundation from all who share our commitment to a stronger community.

- Youth projects which enhance the skill levels and positive development of the community's youth and are inclusive of at-risk youth
- Social service projects for those in need which are designed to develop opportunities and skills for self-sufficiency
- Historical projects which preserve the diverse heritage of the community
- Disaster and emergency relief projects to assist victims to recover

WHO IS ELIGIBLE TO APPLY

To meet the Foundation's legal requirements and, therefore, to be eligible to apply for funding, an applicant must be:

- A nonprofit organization with tax-exempt status under Section 501(c)(3) of the Internal Revenue Code and not classified as a private foundation
- Located within and serving residents of Montana with preference given to Miles City and Custer County
- Operated and organized so it does not discriminate on the basis of race, ethnicity, creed, gender, age, national origin, disability or socioeconomic status in the provision of services or membership; hiring of staff; or selection of the governing body
- Nonpartisan, nonsectarian
  (A project may be considered from a religious organization if it serves the general public as opposed to only those of a particular religion/denomination, and it is designed to endeavor to serve a general charitable purpose rather than the promotion of particular religious/ denominational beliefs and practices)

HOW TO APPLY

After reviewing these Guidelines and Procedures and determining your organization and project/program/operations (hereafter, project) are within the parameters, we invite you to submit an application.

We assume that, when you submit an application, your organization has made an organizational commitment to undertake your proposed plans. We, thus, discourage applications that are merely speculative in nature.

Regretfully, due to the number of needs and requests, the Foundation will not have the resources to fully, or even partially, fund every request it receives. This, however, does not indicate a lack of appreciation for the merits or desirability of a worthwhile proposal. We, therefore, 1) recommend you consider sending your proposal to several other prospective funding sources. Also, we 2) encourage "matching grants" whereby the applicant commits to raising funds to match what we grant up to a 4 to 1 ratio. In fact, matching grants are generally regarded more favorably.

Only thorough and complete grant applications can be considered for funding. Incomplete applications will need to be completed and may delay consideration until the next funding cycle. An application is considered incomplete if it does not include the completed Cover Sheet signed and dated or the requested Cover Letter; has unaddressed points or questions within the Proposal Narrative; does not demonstrate adequate planning or the capacity to effectively carry out the proposed project; or is otherwise incomplete.

TO APPLY, please address each item below. Your application needs to be typewritten with page numbers on unbound $8^1/_2$ x 11 white paper. Each item to be numbered and responded to in the order here.

1. ***Cover Sheet***
Submit the completed, unaltered, typewritten Grant Application Cover Sheet contained within this packet.

ELIGIBILITY REQUIREMENTS

Copies of the following must be included in order for your application to be accepted for review:

2. ***Cover Letter***
Submit a cover letter on letterhead on behalf of your governing board signed by your chair or president of the board or your chief executive officer, indicating a) an organizational commitment to undertake the project as stated in your application, and b) support for requesting funding from our Foundation for this particular project.
(Since we do not have resources to fund various projects from the same organization, if need be, this process may also serve as a clearinghouse so organizations may prioritize in order to determine which project is best for submission to us at the time.)

3. ***Nondiscrimination Policy***
Submit a copy of your organization's board-approved equal opportunity/nondiscrimination operating policy.

4. ***IRS letter***
Submit a copy of official verification of your organization's IRS 501(c)(3) tax-exempt status.
(If you are a tax-exempt government entity, indicate so and specify on the Cover Sheet.)

PROPOSAL NARRATIVE

Having found that successful projects result from good planning, we look for applications that clearly address the numbered points below, which are based on the universally-used, standard "Proposal Narrative". This section is included not as an empty exercise merely for the application, but is meant to reflect the standard planning normally needed to assure the successful design and implementation of a project.

For clarification and, if necessary, to help you assess your readiness to carry out your project, each point of the Narrative section below has been defined with questions for you to answer. In addition, to facilitate your response to our SELECTION CRITERIA, they also have been inserted as questions under the related points in this same Narrative section. Since applications are evaluated for funding based on our SELECTION CRITERIA, the importance of addressing all of them is stressed.

Continues . . .

PROPOSAL NARRATIVE continued

Please number and include the points and questions as stated here before each of your responses. The responses should be concise. We ask that this written Proposal Narrative section (numbers 5-14) be within 5 pages or less.

5. *Organizational Background*

Please indicate a) Name of organization b) When formed c) Mission statement d) How structured e) How governed f)How funded (now and in the future) g) Sponsoring agencies, if applicable h)Describe the extent of your membership and/or participation in your services and any plans to expand it where needed in the community.

6. *Capacity of Your Organization*

a) In what ways do the history and experience of your organization and its leadership and personnel equip it to plan, implement and manage your proposed project successfully? b) How will your organization develop the leadership needed to sustain the project after our grant, as well as sustain the future stability of the organization and any other ongoing projects? c) How will the project help you to further your mission and increase membership and/or participation in services? d) If you characterize your organization as demonstrating excellence, but not yet recognized and adequately funded by other sources, please specify.

7. *Target Population*

a) Which group(s) will be served by your proposed project? b) Location(s) c) What outreach and collaboration has been done to assure you are serving the maximum number of people, especially the needy or under-served and under-represented populations having limited access to resources and services?

8. *Need/Problem Statement*

a) Define the need, problem, issue, or opportunity addressed by your proposed project. b) What do you believe are the causal factors? c) Why is it a priority and what will happen if the situation is unaddressed? d) How does your organization see this need as an opportunity for building community?

9. *Purpose/Objectives*

a) What will this project specifically accomplish towards addressing the above need in terms of measurable outcomes, including outcomes related to prevention as well as solutions? b) How will the target population be better off by the end of your project? c) Will the benefits remain in the community, and what do you anticipate will be the positive and ongoing impact on the development and/or economics of the local community? d)In what ways does your purpose relate to one or more of our Areas of Interest?

10. *Methods/Approach*

a) What sequence of activities is needed to accomplish your objectives and implement your proposal? b) As appropriate, also include management and staff responsibilities, employee and volunteer training, client selection procedures, and timeline. c) Why is this method the most effective and/or innovative way to achieve your objectives?

11. *Evaluation/Accountability*

a) How will you determine your project is working while in progress and b) whether it has successfully accomplished its ultimate purpose/objectives?

(We ask that you share a brief report with the Foundation when the portion of the project we fund is completed.)

12. *Other and Future Funding*

a) If other funding is needed to fund the project budget now, what funding sources and fundraising activities will be used to fund it? (Indicate which are committed and which are projected.) b) If this project is ongoing, after our grant how will it be integrated into your regular budget and funded without further recourse to our Foundation? c) If you receive tax-supported funding, please explain why you also need to request funding from us.

13. *Support and Collaboration*

a) What community support is there for your proposal? b) What actions have you taken to collaborate with other agencies and organizations related to your proposal in order to facilitate collaborative funding; coordinated uses of resources; maximum participation; and multifunctional use of facilities and/or equipment while eliminating duplication of effort throughout the community? c) What resulted from this support and collaboration?

14. *Additional Information*

a) Is there any other information relevant to your project you would like us to know?

Continues . . .

ENCLOSURES

15. *Project Budget*

Enclose your project budget which delineates anticipated income and expenses.

Within the **projected income**, include a) all funding sources (including the amount requested from our Foundation) and b) your fundraisers along with c) donations of time and materials and d) your in-kind contributions, as well as e) all the other related income. If you are applying for a matching grant, please indicate f) which income will be used for matching the amount you are requesting from us and at g) what ratio up to 4 to 1. Also please h) indicate any funding which is already committed at this time rather than just projected.

Within the **projected expenses**, include any a) administrative costs, b) salaries, as well as c) all other expenses related to your project. Please indicate d) which expenses you are proposing we fund and e) which will be covered by your organization's in-kind contributions.

Please include a short statement regarding steps to be taken to spend our grant monies locally where practical.

16. *Governing Board*

List a) Member names, b) Positions on board, and c) Professional and community affiliations.

17. *Staff*

List a) names and b) titles of key paid staff and volunteers who will be responsible for implementing your project. Include c) one line noting the key, relevant qualifications each will bring to your project (no résumés).

18. *Overall Operating Budget with Balance Sheet*

Include the summary of your operating budget and current balance sheet for your overall organization. Please indicate where your Project Budget fits into this overall budget.

19. *Additional Supporting Documentation*

If directly related to your project, you may enclose items such as letters of support from cooperating agencies and organizations, a brochure (originals only) on your organization or project, and media coverage (clear 8½ x 11 photocopies with the name and date of the publication). Please do not include information extraneous to this application.

TECHNICAL ASSISTANCE

If you have questions in completing your application, you are encouraged to contact Sandra Anderson at (406) 347-5336 to avoid going back later, which could cause delays in reviewing your application.

UPDATES

From time to time our Grant Application Guidelines and Procedures are updated. Therefore, before using these in the future, please check with the Foundation to make sure your copy is current.

LETTER OF INQUIRY

We understand that an organization may have plans whereby they are not sure if they fit into our guidelines and funding priorities. If that should be the case for your organization, you may submit a Letter of Inquiry on behalf of your governing body. Please include a summary of the purpose of your plans and inquire whether our Foundation finds them within our funding guidelines and; therefore, suggests you submit a grant application. Such a letter would be due and responded to according to the same schedule outlined below for grant applications. Submit one (1) original and five (5) clear copies of your Letter of Inquiry. Please allow sufficient time before your project starts for review of your letter and then your possible application.

DISCRETIONARY GRANTS

In addition to funding grant applications as described above, the Foundation awards unsolicited, discretionary grants to selected, eligible, tax-exempt organizations according to the wishes of the late Founders and the discretion of the Board of Directors.

SUBMISSION AND REVIEW PROCESS

Please allow enough time for our review before your project is due to start. Submit one (1) original and five (5) clear copies of your completed application (items 1-19 in order) or Letter of Inquiry to:

L. P. AND TERESA ANDERSON FOUNDATION

P.O. Box 190, Hwy. 10 West
Miles City, MT 59301-0190
(406) 232-3920

Please keep a file copy of these Guidelines and Procedures and your complete application or Letter of Inquiry for the review process.

The due dates for Letters of Inquiry and completed applications follow:
(In case of emergency or disaster, exceptions will be taken in to account.)

To be received by:	Notification regarding funding:
September 1	Generally during November
March 1	Generally during May
(or next business day)	

Applications and Letters of Inquiry received after the due date will be entered under the due date for the next funding cycle.

Applications will first be pre-screened for eligibility and completeness as well as whether they fit within the Foundation's funding parameters stated in these Guidelines. Again, incomplete applications will need to be completed in order to be considered for funding and could result in a delay until the next grant period. Qualifying applications will be entered into the pool of competition for the current funding cycle. Applications will then be evaluated in relation to the Foundation's Areas of Interest and Selection Criteria. From there applications with recommendations are presented to the full Board of Directors. Their decisions on final selection and grant amounts are based on the funding priorities relative to our budget constraints and an overall perspective of the combined needs.

During this process, there may be a need for the Foundation to work with your contact person to gain additional information through phone conferences, interviews, or site visits. This person needs to be available to respond; know your organization; be conversant with the grant application and project involved; and be sanctioned to serve as the contact.

FOUNDERS

Mr. Lawrence "L. P." Anderson (1918-1994)

Mrs. Teresa L. (Patrick) Anderson (1919-1992)

BOARD OF DIRECTORS

Sandra K. Anderson, President
Jeffery A. Hunnes, Secretary
John R. Tooke, Treasurer

SA:rc

10/03 Updated

L. P. AND TERESA ANDERSON FOUNDATION

GRANT APPLICATION COVER SHEET

Please complete, typewritten within the spaces provided, and submit unaltered with your completed application.

Name of Organization______________________________

Address______________________________

Service Area(s)______________________________

Contact Person______________ Title______________ Phone______________

(See Guidelines for explanation of terms.)

Check one ☑

☐ Tax-exempt 501(c)(3)
(IRS verification letter must be included)
or
☐ Tax-exempt governmental entity
Specify______________

Check one ☑

WHAT PURPOSE
☐ Start up of a new program/new special project
☐ Expansion of a program/project to new populations
Support for existing:
☐ operations or ☐ project

Check one or more ☑

AREAS OF INTEREST
☐ Youth / At-Risk
☐ Social Services / Needy
☐ Historical Preservation
☐ Disaster / Emergency

Amount of request $__________
Total project cost $__________
First time request ☐ yes ☐ no
If previously funded:
Amount $__________ Mo. / Yr.__________
Different project, population or phase ☐ yes ☐ no

Nonpartisan Proposal ☐ yes ☐ no
Nonsectarian Proposal ☐ yes ☐ no

Matching ☐ yes ☐ no
Multiple funding sources ☐ yes ☐ no

Check one ☑

FUNDING CYCLE
☐ September 1, 200___ for November response ☐ March 1, 200___ for May response

EXECUTIVE SUMMARY

Name of project (if different)______________________________

Target population and location______________________________

Brief summary of the purpose of your project______________________________

Timeframe From______________ To______________

Why should your application be selected for funding?______________________________

If funded, how will our grant monies be used?______________________________

Signature______________ Title______________ Date______________

7/31/97