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Form 990-PF

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

OMB No 1545-0052

2011

Department of the Treasury
Internal Revenue Service

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

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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
National Recreation Foundation Inc

Number and street (or P O box number if mail is not delivered to street address)
C/O Tony Mobley PO Box 8007

Room/suite

City or town, state, and ZIP code
Bloomington, IN 47407

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)

J Accounting method

\$ 35,747,388

☐ Cash

☒ Accrual

Other (specify)

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

A Employer identification number
13-6172514

B Telephone number (see page 10 of the instructions)
(812) 855-1342

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

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.	741,531	741,531	741,531	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,000,987			
	b Gross sales price for all assets on line 6a _____ 11,314,564				
	7 Capital gain net income (from Part IV , line 2)		1,000,987		
	8 Net short-term capital gain			1,000,987	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	46,869	46,869		
	12 Total. Add lines 1 through 11	1,789,387	1,789,387	1,742,518	
	13 Compensation of officers, directors, trustees, etc	155,662			155,662
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	7,695			
	c Other professional fees (attach schedule)	156,363	156,363	156,363	
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	82,156	82,156	82,156	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	8,510			8,510
	22 Printing and publications	3,348			3,348
	23 Other expenses (attach schedule).	66,426			66,426
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	480,160	238,519	238,519	233,946
	25 Contributions, gifts, grants paid	1,950,477			1,950,477
	26 Total expenses and disbursements. Add lines 24 and 25	2,430,637	238,519	238,519	2,184,423
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-641,250			
	b Net investment income (if negative, enter -0-)		1,550,868		
	c Adjusted net income (if negative, enter -0-)			1,503,999	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Cat No 11289X

Form 990-PF (2011)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	2,955,654	1,267,877	1,267,877
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see 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			
	10a	Investments—U S and state government obligations (attach schedule)	4,044,896	 3,697,149	3,906,820
	b	Investments—corporate stock (attach schedule)	4,838,081	 5,312,950	5,400,461
	c	Investments—corporate bonds (attach schedule).	416,480	 791,310	785,778
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	23,854,247	 24,417,420	24,309,842
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	15	Other assets (describe ▶ _____)	 80,782	 76,610	 76,610
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	36,190,140	35,563,316	35,747,388

Liabilities	17	Accounts payable and accrued expenses	28,040	1,896	
	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 ▶ _____)	 1	 1	
	23	Total liabilities (add lines 17 through 22)	28,041	1,897	

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	36,162,099	35,561,419	
	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)	36,162,099	35,561,419	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	36,190,140	35,563,316	

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	36,162,099
2	Enter amount from Part I, line 27a	2	-641,250
3	Other increases not included in line 2 (itemize) ▶  _____	3	40,570
4	Add lines 1, 2, and 3	4	35,561,419
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	35,561,419

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	1,000,987
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	1,000,987

2	Total of line 1, column (d).	2	0 17677
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 05892
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	36,667,867
5	Multiply line 4 by line 3.	5	2,160,617
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	15,509
7	Add lines 5 and 6.	7	2,176,126
8	Enter qualifying distributions from Part XII, line 4.	8	2,184,423
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 VIExcise 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	15,509
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	15,509
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	15,509
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	40,655	
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	40,655
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	25,146
11		Enter the amount of line 10 to be Credited to 2012 estimated tax ☐ 25,146	Refunded ☐	11	

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
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)?			No
	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		No
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?	2		No
	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		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	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		No
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☒ NY _____			
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	Yes	
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address www.nationalrecreationfoundation.org				
14	The books are in care of Tony Mobley Telephone no (812) 855-1342 Located at PO Box 8007 Bloomington IN ZIP +4 47407			
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 2011, 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	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country OC				

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 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
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 2011?	1c		No
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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 20____, 20____, 20____, 20____ ☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
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 2011 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>)	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2011?	4b		No

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))?

YesNo

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(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).

YesNo

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

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)? Organizations relying on a current notice regarding disaster assistance check here.

YesNo

5b

No

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?

YesNo

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?

YesNo

b

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

YesNo

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

6b

No

7a

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

YesNo

b

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

YesNo

7b

No

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
See Additional Data Table				

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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 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	
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	36,667,867
b	Average of monthly cash balances.	1b	1,274,958
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	37,942,825
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	37,942,825
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	1,274,958
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	36,667,867
6	Minimum investment return. Enter 5% of line 5.	6	1,833,393

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	1,833,393
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	15,509
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,509
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,817,884
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,817,884
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	1,817,884

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	2,184,423
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	2,184,423
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	15,509
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,168,914
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 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7				1,817,884
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2011				
a	From 2006.				
b	From 2007.				
c	From 2008.				346,965
d	From 2009.				353,287
e	From 2010.				276,097
f	Total of lines 3a through e.	976,349			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 2,184,423				
a	Applied to 2010, but not more than line 2a				
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). . .	0			
d	Applied to 2011 distributable amount.				1,817,884
e	Remaining amount distributed out of corpus	366,539			
5	Excess distributions carryover applied to 2011 (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	1,342,888			
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 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				0
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 2006 not applied on line 5 or line 7 (see page 27 of the instructions).				
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.	1,342,888			
10	Analysis of line 9				
a	Excess from 2007. . . .				
b	Excess from 2008. . . .				346,965
c	Excess from 2009. . . .				353,287
d	Excess from 2010. . . .				276,097
e	Excess from 2011. . . .				366,539

Part XIVPrivate 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 2011, enter the date of the ruling.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
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 XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 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))

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

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

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	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,950,477
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2011)

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?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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.			

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
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May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Additional Data

Software ID: 11000144
Software Version: 2011v1.2
EIN: 13-6172514
Name: National Recreation Foundation Inc

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Tony Mobley	Secretary/ED 30 00	155,662		
PO Box 8007 Bloomington, IN 47407				
James R Donnelley	Past President 1 00	0		
PO Box 8007 Bloomington, IN 47407				
Jonathan D Scott	Treasurer 1 00	0		
PO Box 8007 Bloomington, IN 47407				
Robert A Stuart Jr	Second VP 1 00	0		
PO Box 8007 Bloomington, IN 47407				
Francis P Pandolfi	Vice President 1 00	0		
PO Box 8007 Bloomington, IN 47407				
Kathryn A Porter	President 1 00	0		
PO Box 8007 Bloomington, IN 47407				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
Namaste Charter School3737 S Paulina Street Chicago,IL 60609	none	501c(3)	To support the academic and wellness programs for the students	30,000
Haven for Hope of Bexar CountyOne Haven for Hope Way San Antonio,TX 78207	none	501c(3)	To support their programs assisting homeless men, women and children	50,000
USTA Serves Inc70 West Red Oak Lane White Plains,MA 10604	none	501c(3)	To support the Adopt-a-Unit Program	112,500
Latino Theater Company514 S Spring Street Los Angeles,CA 90013	none	501c(3)	To support the Summer Conservatory for Dance program	75,000
SOS Outreach910 Nottingham N-12 Avon,CO 81632	none	501c(3)	To support the University Program	30,000
North Texas Public Broadcasting 3000 Harry Hines Boulevard Dallas,TX 75201	none	501c(3)	To support the Healthy Families Initiative	30,000
Stonington Community Center28 Cutler Street Stonington,CT 06378	none	501c(3)	To support the establishment of a new arts center	30,000
The MGR Foundation6348 N Milwaukee Avenue Chicago,IL 60646	none	501c(3)	To support the Team M3 Chicago Student Mentor Run Program	30,000
Youth and Community Services9 East 89th Street New York,NY 10128	none	501c(3)	To support the African Runners Art Exhibit	30,000
Outward Bound Bay Area Center1539 Pershing Dr San Francisco,CA 94129	none	501c(3)	To support student participation in 3-5 day urban or wilderness courses	30,000
Board of Trustees of the Univ of IL 1603 West Taylor Street Chicago,IL 60612	none	501c(3)	To support the planning, preparation and implementation of a series of peace conferences	30,000
Volunteers of America NNE14 Maine Street Brunswick,ME 04011	none	501c(3)	To support Camp Postcard	30,000
Sequor FoundationPO Box 550 Marshall,TX 75671	none	501c(3)	To support the Afterschool Alliance Program	30,000
TCU Institute of Child Development TCU Box 298920 Fort Worth,TX 76129	none	501c(3)	To support the implementation of a comprehensive training program for children's residential care centers, community agencies, and other professionals who support at-risk children	125,000
Greater Newark Conservancy972 Broad Street 8th Floor Newark,NJ 07102	none	501c(3)	To support the Youth Garden and Nutrition Initiative	30,000
Focus Hope1355 Oakman Blvd Detroit,MI 48238	none	501c(3)	To expand the Focus Hope after school program and summer camp	50,000
Cristo Rey Jesuit High School420 S Chester Steet Baltimore,MD 21231	none	School	To support the Healthy Lifestyles pilot program	47,092
Boys Girls Clubs of Lake County724 S Genesee Street Waukegan,IL 60085	none	501c(3)	To support the Triple Play Program	30,000
Boys Girls Clubs of Gulf Coast11975-B Seaway Road Gulfport,MS 39503	none	501c(3)	To support the Triple Play Program, with the future goal of expanding the program to all youth served on the Mississippi Gulf coast	30,000
Big Brothers Big Sisters - Metro De 23077 Greenfield Rd Ste 430 Southfield,MI 48075	none	501c(3)	To support the Sports Buddies Program	100,000
Urban Youth MinistriesPO Box 11295 Denver,CO 80211	none	501c(3)	To support programs seeking to fill the gap in parenting resources that exist in single parent households of at-risk youth in the Denver area	25,000
Neighborhood Youth Association1016 Pleasant View Ave Venice,CA 90291	none	501c(3)	To support the NYA Personal Best Program which assists the prevention of anti-social behavior and encourages proactive lifestyles and healthy values for at-risk youth	35,000
National Recreation Parks Admin 22337 Belmot Ridge Road Ashburn,VA 20148	none	501c(3)	To support the development and expansion of community gardens within urban settings	106,500
Cranbrook Education CommunityPO Box 801 Bloomfield Hills,MI 48303	none	501c(3)	To support the newly created mentoring program and the Exercise, Gardening and Reading program	129,090
Colorado UpLIFT3914 King Street Denver,CO 80211	none	501c(3)	To support their five program areas character education, arts, professional development, sports, cooking, outdoor recreation, team building and mentoring	405,000
Camp for All Foundation10500 Northwest Freeway Suite 220 Houston,TX 77092	none	501c(3)	To support the Camp For All program through enhancing ropes challenge course, and increasing the number of participant who can simultaneously use the course	38,000
Audubon Colorado1966 13th Street Suite 230 Boulder,CO 80302	none	501c(3)	To support the environmental education program in southwest Colorado	25,000
American Trauma Society2 Flowers Drive Mechanicsburg,PA 17050	none	501c(3)	To fund the production of materials and continued development of the "I'm Ready" program	30,000
Russell Byers Charter School1911 Arch Street Philadelphia,PA 19103	none	501c(3)	To support the Healthy Leaders Program and the ABC Leadership Program	107,295
Trust of Public Lands20 Community Place 2nd Floor Morristown,NJ 07960	none	501c(3)	To support the Parks for People project that will build four new play spaces for the youth of Newark and implement a sustainable stewardship strategy for these sites	100,000
Total  3a				1,950,477

TY 2011 Accounting Fees Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	7,695	0	0	0

**TY 2011 Investments Corporate
Bonds Schedule****Name:** National Recreation Foundation Inc**EIN:** 13-6172514**Software ID:** 11000144**Software Version:** 2011v1.2

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Corporate Bonds	791,310	785,778

**TY 2011 Investments Corporate
Stock Schedule****Name:** National Recreation Foundation Inc**EIN:** 13-6172514**Software ID:** 11000144**Software Version:** 2011v1.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Stocks	5,312,950	5,400,461

TY 2011 Investments Government Obligations Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

US Government Securities - End of

Year Book Value:

3,697,149

US Government Securities - End of

Year Fair Market Value:

3,906,820

**State & Local Government
Securities - End of Year Book
Value:**

**State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2011 Investments - Other Schedule**Name:** National Recreation Foundation Inc**EIN:** 13-6172514**Software ID:** 11000144**Software Version:** 2011v1.2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Other Securities	FMV	4,383,286	4,415,885
Mutual Funds	FMV	13,734,134	14,335,959
Alternate Investments	FMV	6,300,000	5,557,998

TY 2011 Other Assets Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued Income	80,782	76,610	76,610

TY 2011 Other Expenses Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Web site	180			180
Office Supplies	2,948			2,948
Miscellaneous	4,479			4,479
Insurance	3,283			3,283
Grad Student	19,216			19,216
Donations	5,000			5,000
Book Design	13,500			13,500
Board Meeting	17,820			17,820

TY 2011 Other Income Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	46,869	46,869	

TY 2011 Other Increases Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Description	Amount
Capital Gains Distribution	40,570

TY 2011 Other Liabilities Schedule

Name: National Recreation Foundation Inc

EIN: 13-6172514

Software ID: 11000144

Software Version: 2011v1.2

Description	Beginning of Year - Book Value	End of Year - Book Value
Rounding	1	1

TY 2011 Other Professional Fees Schedule**Name:** National Recreation Foundation Inc**EIN:** 13-6172514**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Fees	138,395	138,395	138,395	0
Bank Fees	17,968	17,968	17,968	0

TY 2011 Taxes Schedule**Name:** National Recreation Foundation Inc**EIN:** 13-6172514**Software ID:** 11000144**Software Version:** 2011v1.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Tax	34,568	34,568	34,568	
Excise Taxes	47,588	47,588	47,588	