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Form 990  Department of the Treasury Internal Revenue Service	Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)	OMB No 1545-0047 2011 Open to Public Inspection
	▶ The organization may have to use a copy of this return to satisfy state reporting requirements	

A For the 2011 calendar year, or tax year beginning 07-01-2011 and ending 06-30-2012		D Employer identification number 23-1177930	
B Check if applicable ☐ Address change ☐ Name change ☐ Initial return ☐ Terminated ☒ Amended return ☐ Application pending		E Telephone number (610) 409-3000	
C Name of organization Ursinus College Doing Business As Number and street (or P O box if mail is not delivered to street address) Room/suite 601 East Main Street City or town, state or country, and ZIP + 4 Collegeville, PA 19426		G Gross receipts \$ 156,088,116	
F Name and address of principal officer Dr Bobby Fong 601 East Main Street Collegeville, PA 19426		H(a) Is this a group return for affiliates? ☐ Yes ☒ No H(b) Are all affiliates included? ☐ Yes ☐ No If "No," attach a list (see instructions) H(c) Group exemption number ▶	
I Tax-exempt status ☒ 501(c)(3) ☐ 501(c) () ◀ (Insert no) ☐ 4947(a)(1) or ☐ 527			
J Website: ▶ www.ursinus.edu			
K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶		L Year of formation 1869	M State of legal domicile PA

Part I	Summary
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Activities & Governance	1 Briefly describe the organization's mission or most significant activities The mission of Ursinus College is to enable students to become independent, responsible, and thoughtful individuals through a program of liberal education		
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	36
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	34
	5 Total number of individuals employed in calendar year 2011 (Part V, line 2a)	5	1,627
6 Total number of volunteers (estimate if necessary)	6	0	
7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	5,255	
7b Net unrelated business taxable income from Form 990-T, line 34	7b	-5,612	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	8,919,409	6,285,899
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	87,482,246	88,831,592
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	7,568,332	7,050,527
	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	569,426	449,034
		104,539,413	102,617,052
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	35,582,112	36,160,663
	14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	27,752,361	30,401,835
	16a Professional fundraising fees (Part IX, column (A), line 11e)	63,345	57,112
	b Total fundraising expenses (Part IX, column (D), line 25) ☒ 1,893,458		
	17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	32,484,574	32,819,021
	18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	95,882,392	99,438,631
	19 Revenue less expenses Subtract line 18 from line 12	8,657,021	3,178,421
	Net Assets or Fund Balances		Beginning of Current Year
20 Total assets (Part X, line 16)		275,034,825	269,292,866
21 Total liabilities (Part X, line 26)		67,612,327	66,399,700
22 Net assets or fund balances Subtract line 21 from line 20		207,422,498	202,893,166

Part II	Signature Block
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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 officer) is based on all information of which preparer has any knowledge.

Sign Here	***** Signature of officer			2013-11-05 Date	
	JONATHON C IVEC VP FINANCE & ADMINISTRATION Type or print name and title				
Paid Preparer's Use Only	Preparer's signature	Frank Giardini	Date	Check if self-employed ☐	Preparer's taxpayer identification number (see instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	GRANT THORNTON LLP 2001 MARKET STREET SUITE 3100 PHILADELPHIA, PA 19103			EIN
					Phone no (215) 561-4200

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III ☐ Yes ☒ No

1

Briefly describe the organization's mission

THE MISSION OF URSINUS COLLEGE IS TO ENABLE STUDENTS TO BECOME INDEPENDENT, RESPONSIBLE, AND THOUGHTFUL INDIVIDUALS THROUGH A PROGRAM OF LIBERAL EDUCATION THAT EDUCATION PREPARES THEM TO LIVE CREATIVELY AND USEFULLY, AND TO PROVIDE LEADERSHIP FOR THEIR SOCIETY IN AN INTERDEPENDENT WORLD

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

3

Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

4

Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code) (Expenses \$ 66,767,070 including grants of \$ 36,160,663) (Revenue \$ 72,358,435)

Academic Instruction The College provides education leading to either Bachelor of Arts or Bachelor of Sciences degrees to full-time undergraduate students from various states and countries, most of who reside in campus residence halls The College also provides education leading to Bachelor of Business Administration degrees, Bachelor of Arts and Bachelor of Science degrees to part-time evening students

4b

(Code) (Expenses \$ 20,978,188 including grants of \$) (Revenue \$ 16,473,157)

Student Services, including Housing, Room & Board, and Athletics The College offers living accommodations for most of its students in either traditional residence halls integrated into the campus, or in renovated historic homes in the community that border the campus Students may choose from a variety of meal plans and may choose to take their meals in the main dining hall, or in Zack's, the campus grill and snack bar Ursinus offers opportunities to achieve athletic and personal goals through intercollegiate athletics, club sports and intramural programs Over 85% of Ursinus students integrate some aspect of the athletic program into their lives at the College

4c

(Code) (Expenses \$ including grants of \$) (Revenue \$)

4d

Other program services (Describe in Schedule O)

(Expenses \$ including grants of \$) (Revenue \$)

4e

Total program service expenses \$ 87,745,258

Form 990 (2011)

Part IV

Checklist of Required Schedules

		Yes	No	
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A 	1	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? 	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3		No
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4		No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5		
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I 	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II 	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III 	8	Yes	
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV 	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V 	10	Yes	
11	If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI. 	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII. 	11b	Yes	
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII. 	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX. 	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X. 	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X. 	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII 	12a	Yes	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional 	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E 	13	Yes	
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Part I 	14b	Yes	
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S ? If "Yes," complete Schedule F, Part II and IV 	15		No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S ? If "Yes," complete Schedule F, Part III and IV 	16	Yes	
17	Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I 	17	Yes	
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II 	18	Yes	
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III 	19		No
20a	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20a		No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? Note. All Form 990 filers that operated one or more hospitals must attach audited financial statements	20b		

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21		No
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b–24d and complete Schedule K. If "No," go to line 25</i>	24a	Yes	
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		No
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		No
25a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26	Yes	
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27	Yes	
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	Yes	
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33		No
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34	Yes	
35a	Is any related organization a controlled entity of the filing organization within the meaning of section 512(b)(13)?	35a		No
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b		No
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance						
Check if Schedule O contains a response to any question in this Part V ☐						
		Yes	No			
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. .	1a	2,560			
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	Yes			
2a	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return.	2a	1,627			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	2b	Yes			
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	Yes			
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.	3b	Yes			
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account or securities account)?	4a				No
b	If "Yes," enter the name of the foreign country: _____ See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a				No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b				No
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c				
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	6a				No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b				
7	Organizations that may receive deductible contributions under section 170(c).					
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	Yes			
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	Yes			
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c				No
d	If "Yes," indicate the number of Forms 8282 filed during the year.	7d				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e				No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f				No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g				
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h				
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8				
9	Sponsoring organizations maintaining donor advised funds.					
a	Did the organization make any taxable distributions under section 4966?	9a				
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b				
10	Section 501(c)(7) organizations. Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12.	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	10b				
11	Section 501(c)(12) organizations. Enter					
a	Gross income from members or shareholders.	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).	11b				
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a				
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	12b				
13	Section 501(c)(29) qualified nonprofit health insurance issuers.					
a	Is the organization licensed to issue qualified health plans in more than one state? Note. All 501(c)(29) organizations must list in Schedule O each state in which they are licensed to issue qualified health plans, the amount of reserves required by each state, and the amount of reserves the organization allocated to each state.	13a				
b	Enter the aggregate amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.	13b				
c	Enter the aggregate amount of reserves on hand.	13c				
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a				No
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.	14b				

Part VI

Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.
Check if Schedule O contains a response to any question in this Part VI ☒

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year		
1a	36		
b	Enter the number of voting members included in line 1a, above, who are independent	1b	34
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3	No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	No
6	Did the organization have members or stockholders?	6	No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b	No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
a	The governing body?	8a	Yes
b	Each committee with authority to act on behalf of the governing body?	8b	Yes
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9	No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a	No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes
b	Describe in Schedule O the process, if any, used by the organization to review the Form 990		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes
b	Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes
13	Did the organization have a written whistleblower policy?	13	Yes
14	Did the organization have a written document retention and destruction policy?	14	No
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official	15a	Yes
b	Other officers or key employees of the organization	15b	Yes
	If "Yes," to line 15a or 15b, describe the process in Schedule O (see instructions)		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	

Section C. Disclosure

17	List the States with which a copy of this Form 990 is required to be filed▶PA
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply. ☒ Own website ☐ Another's website ☒ Upon request
19	Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶ JAMES E COOPER 601 EAST MAIN STREET Collegeville, PA 19426 (610) 409-3562

Check if Schedule O contains a response to any question in this Part VII ☐

☐ Check this box if neither the organization nor any related organizations compensated any current or former officer, director, or trustee

Form **990** (2011)

Part VII

1b	Sub-Total			
c	Total from continuation sheets to Part VII, Section A			
d	Total (add lines 1b and 1c)	1,783,758	0	286,777

2 Total number of individuals (including but not limited to those listed in Item 1) who received or accrued more than \$100,000 of reportable compensation from the organization. ▶ 24

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3	No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4	Yes
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
Sodexo Inc Affiliates 9801 Washingtonian Blvd GAINESVILLE, VA 20878	Food Service	4,429,338
eBenefits Partner LLC US Steel Tower 56th Fl 600 Grant PITTSBURGH, PA 15219	Benefits Admin	1,517,264
Warfel Construction Co 1110 Enterprise Rd EAST PETERSBURG, PA 17520	Constr Contractor	1,458,192
Deluxe Athletics LLC 80 Scott Drive MARIETTA, GA 30067	Synthetic Turf	1,377,189
Dell Financial Services One Dell Way ROUND ROCK, TX 78682	Laptop Computers	1,138,315
2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization 52		

Part VIII

Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . .	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c	49,620			
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	2,299,721			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	3,936,558			
	g	Noncash contributions included in lines 1a-1f \$ 588,101					
	h	Total. Add lines 1a-1f		6,285,899			
Program Service Revenue	2a	ACADEMIC INSTRUCTION - TUITION AND FEES	Business Code	72,159,140	72,159,140		
	b	ACADEMIC INSTRUCTION-AUXILIARY ENTERPRISES		199,295	199,295		
	c	STUDENT SERVICES - ROOM AND BOARD		16,413,978	16,413,978		
	d	STUDENT SERVICES-AUXILIARY ENTERPRISES		59,179	59,179		
	e						
	f	All other program service revenue					
	g	Total. Add lines 2a-2f		88,831,592			
	Other Revenue	3	Investment income (including dividends, interest and other similar amounts)		2,854,657		2,040
4		Income from investment of tax-exempt bond proceeds . .		0			
5		Royalties		0			
6a		Gross rents	(i) Real (ii) Personal				
b		Less rental expenses					
c		Rental income or (loss)					
d		Net rental income or (loss)					
7a		Gross amount from sales of assets other than inventory	(i) Securities (ii) Other				
b		Less cost or other basis and sales expenses					
c		Gain or (loss)					
d		Net gain or (loss)		4,195,870		1,815	4,194,055
8a		Gross income from fundraising events (not including \$ 49,620 of contributions reported on line 1c) See Part IV, line 18	a b	211,626 250,875			
b		Less direct expenses					
c		Net income or (loss) from fundraising events . .		-39,249			-39,249
9a		Gross income from gaming activities See Part IV, line 19	a				
b		Less direct expenses					
c		Net income or (loss) from gaming activities . .		0			
10a		Gross sales of inventory, less returns and allowances	a				
b		Less cost of goods sold					
c		Net income or (loss) from sales of inventory . .		0			
	Miscellaneous Revenue	Business Code					
11a	MISCELLANEOUS REVENUE		488,283	486,883	1,400		
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d		488,283				
12	Total revenue. See Instructions		102,617,052	89,318,475	5,255	7,007,423	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns
All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D)
Check if Schedule O contains a response to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the United States See Part IV, line 21	0			
2	Grants and other assistance to individuals in the United States See Part IV, line 22	35,731,433	35,731,433		
3	Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16	429,230	429,230		
4	Benefits paid to or for members	0			
5	Compensation of current officers, directors, trustees, and key employees	1,365,736	415,271	678,756	271,709
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0			
7	Other salaries and wages	21,411,352	18,924,489	1,774,729	712,134
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	1,421,169	1,243,600	129,662	47,907
9	Other employee benefits	4,384,028	3,753,447	444,649	185,932
10	Payroll taxes	1,819,550	1,544,676	196,067	78,807
11	Fees for services (non-employees)				
a	Management	0			
b	Legal	356,740		356,740	
c	Accounting	169,722		169,722	
d	Lobbying	0			
e	Professional fundraising See Part IV, line 17	57,112			57,112
f	Investment management fees	464,237		464,237	
g	Other	1,327,524	1,038,669	247,770	41,085
12	Advertising and promotion	15,103	14,783	320	
13	Office expenses	2,262,142	1,657,918	428,922	175,302
14	Information technology	1,823,341	1,635,890	187,451	
15	Royalties	0			
16	Occupancy	9,033,737	8,630,505	403,232	
17	Travel	1,089,654	1,014,518	52,844	22,292
18	Payments of travel or entertainment expenses for any federal, state, or local public officials	0			
19	Conferences, conventions, and meetings	97,704	75,917	18,250	3,537
20	Interest	2,281,391		2,281,391	
21	Payments to affiliates	0			
22	Depreciation, depletion, and amortization	3,890,404	3,539,375	351,029	
23	Insurance	689,951	351,863	288,267	49,821
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24f If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O)				
a	FOOD SERVICE	4,691,614	4,411,565	121,011	159,038
b	INSTRUCTION/CAMPUS PROGRAMS	2,290,310	2,245,644	12,219	32,447
c	EQUIPMENT/FURNITURE/FIXTURES	608,390	445,414	161,598	1,378
d	LIBRARY MATERIALS	445,072	445,072		
e					
f	All other expenses	1,281,985	195,979	1,031,049	54,957
25	Total functional expenses. Add lines 1 through 24f	99,438,631	87,745,258	9,799,915	1,893,458
26	Joint costs. Check here ☐ if following SOP 98-2 (ASC 958-720) Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X

Balance Sheet

					(A)		(B)
					Beginning of year		End of year
Assets	1	Cash—non-interest-bearing			6,750	1	6,750
	2	Savings and temporary cash investments			12,232,025	2	11,084,984
	3	Pledges and grants receivable, net			1,672,864	3	1,023,356
	4	Accounts receivable, net			1,060,497	4	893,686
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L			10,068	5	4,883
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L			0	6	0
	7	Notes and loans receivable, net			1,982,512	7	1,775,966
	8	Inventories for sale or use			0	8	0
	9	Prepaid expenses and deferred charges			1,835,782	9	1,801,684
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a	180,396,370			
	b	Less accumulated depreciation	10b	57,415,375	121,568,215	10c	122,980,995
	11	Investments—publicly traded securities			113,022,073	11	109,416,728
	12	Investments—other securities See Part IV, line 11			20,046,089	12	18,434,629
	13	Investments—program-related See Part IV, line 11			0	13	0
	14	Intangible assets			0	14	0
	15	Other assets See Part IV, line 11			1,597,950	15	1,869,205
	16	Total assets. Add lines 1 through 15 (must equal line 34)			275,034,825	16	269,292,866
Liabilities	17	Accounts payable and accrued expenses			7,741,647	17	6,164,809
	18	Grants payable			0	18	0
	19	Deferred revenue			796,002	19	632,646
	20	Tax-exempt bond liabilities			48,424,494	20	48,606,469
	21	Escrow or custodial account liability Complete Part IV of Schedule D			0	21	0
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L			0	22	0
	23	Secured mortgages and notes payable to unrelated third parties			0	23	0
	24	Unsecured notes and loans payable to unrelated third parties			0	24	0
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D			10,650,184	25	10,995,776
	26	Total liabilities. Add lines 17 through 25			67,612,327	26	66,399,700
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets			108,115,661	27	108,830,639
	28	Temporarily restricted net assets			20,375,048	28	15,513,070
	29	Permanently restricted net assets			78,931,789	29	78,549,457
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.						
	30	Capital stock or trust principal, or current funds				30	
	31	Paid-in or capital surplus, or land, building or equipment fund				31	
	32	Retained earnings, endowment, accumulated income, or other funds				32	
	33	Total net assets or fund balances			207,422,498	33	202,893,166
	34	Total liabilities and net assets/fund balances			275,034,825	34	269,292,866

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	102,617,052
2	Total expenses (must equal Part IX, column (A), line 25)	2	99,438,631
3	Revenue less expenses Subtract line 2 from line 1	3	3,178,421
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	207,422,498
5	Other changes in net assets or fund balances (explain in Schedule O)	5	-7,707,753
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	202,893,166

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		No
b	Were the organization's financial statements audited by an independent accountant?	Yes	
c	If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
d	If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separated basis		
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	Yes	
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	Yes	

Additional Data

Software ID:
Software Version:
EIN: 23-1177930
Name: Ursinus College

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
John E F Corson Chairman of the Board of Dir	1 0	X		X				0	0	0
Wilbert Abele Voting Member, Board of Dir	1 0	X						0	0	0
Robert Barchi MD Voting Member, Board of Dir	1 0	X						0	0	0
Donald Parlee MD Voting Member, Board of Dir	1 0	X						0	0	0
Kim O'Brien Voting Member, Board of Dir	1 0	X						0	0	0
Phillip Brackin MD Voting Member, Board of Dir	1 0	X						0	0	0
Ruth Kurisu Voting Member, Board of Dir	1 0	X						0	0	0
Llewellyn Smith Voting Member, Board of Dir	1 0	X						0	0	0
Frederick Callahan Voting Member, Board of Dir	1 0	X						0	0	0
Claudia Highbaugh Voting Member, Board of Dir	1 0	X						0	0	0
Alan Novak Esq Voting Member, Board of Dir	1 0	X						0	0	0
Robert Keehn Voting Member, Board of Dir	1 0	X						0	0	0
Francis Correll Esq Voting Member, Board of Dir	1 0	X						0	0	0
Henry Pfeiffer Voting Member, Board of Dir	1 0	X						0	0	0
Cynthia A Fisher Voting Member, Board of Dir	1 0	X						0	0	0
Carol Haas Voting Member, Board of Dir	1 0	X						0	0	0
Patricia Cosgrave Secretary of the Board of Dir	1 0	X						0	0	0
Jeffrey Beck Treasurer of the Board of Dir	1 0	X						0	0	0
Geoffrey Bloom Voting Member, Board of Dir	1 0	X						0	0	0
William Bromley Voting Member, Board of Dir	1 0	X						0	0	0
Michael Carter MD Voting Member, Board of Dir	1 0	X						0	0	0
Michael Cola Voting Member, Board of Dir	1 0	X						0	0	0
Robert L Brant Esq Voting Member, Board of Dir	1 0	X						0	0	0
Scott Rhoades Voting Member, Board of Dir	1 0	X						0	0	0
Rev Dr Harold C Smith Voting Member, Board of Dir	1 0	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Joseph Desimone Voting Member, Board of Dir	1 0	X						0	0	0
Kelly Finch Voting Member, Board of Dir	1 0	X						0	0	0
Michael Hardy Voting Member, Board of Dir	1 0	X						0	0	0
Jerrold Harris Voting Member, Board of Dir	1 0	X						0	0	0
Nina B Stryker Esq Voting Member, Board of Dir	1 0	X						0	0	0
Kemi Laniya Esq Voting Member, Board of Dir	1 0	X						0	0	0
Carol Lawrence Voting Member, Board of Dir	1 0	X						0	0	0
Michael Lewis Voting Member, Board of Dir	1 0	X						0	0	0
J Robert Lovett Vice Chair of the Board of Dir	1 0	X						0	0	0
Nancy Opalack Voting Member, Board of Dir	1 0	X						0	0	0
Carl V Buck III Esq Voting Member, Board of Dir	1 0	X						0	0	0
William Warden Voting Member, Board of Dir	1 0	X						0	0	0
Michael C Marcon Voting Member, Board of Dir	1 0	X						0	0	0
John E F Corson Interim Pres of the College	40 0			X				123,848	0	153
Winfield L Guilmette VP for Finance & Admin	40 0			X				195,413	0	18,076
Bobby Fong President of the College	40 0			X				191,830	0	49,181
Richard Difeliciantonio VP for Enrollment	40 0				X			183,305	0	33,822
Judith T Levy VP for Academic Affairs	40 0				X			174,730	0	18,073
Jill A Marsteller VP for College Relations	40 0				X			268,025	0	18,386
John P King Chief Information Officer	40 0					X		148,109	0	68,443
James L Baer Attorney-in-Residence	40 0					X		135,470	0	17,470
Sterling Garcia Sr Dir Alumni/Parent Programs	40 0					X		123,524	0	14,316
Laura Moliken Athletic Director	40 0					X		120,734	0	30,461
Jay K Miller Assoc Dean & Professor of MCS	40 0					X		118,770	0	18,396

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public
Inspection

Name of the organization Ursinus College	Employer identification number 23-1177930
---	--

Part I

Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1

☐

A church, convention of churches, or association of churches **section 170(b)(1)(A)(i).**

2

☒

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state

5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7

☐

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II)

8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

10

☐

An organization organized and operated exclusively to test for public safety Se**section 509(a)(4).**

11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a

☐

Type I

b

☐

Type II

c

☐

Type III - Functionally integrated

d

☐

Type III - Other

e

☐

By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f

☐

If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box

g

☐

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i)

a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?

(ii)

a family member of a person described in (i) above?

(iii)

a 35% controlled entity of a person described in (i) or (ii) above?

h

☐

Provide the following information about the supported organization(s)

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support?
			Yes	No	Yes	No	Yes	No	
Total									

Part II

Support Schedule for Organizations Described in IRC 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						
Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public Support. Subtract line 5 from line 4						

Section B. Total Support							
Calendar year (or fiscal year beginning in)		(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
7	Amounts from line 4						
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9	Net income from unrelated business activities, whether or not the business is regularly carried on						
10	Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets						
11	Total support (Add lines 7 through 10)						
12	Gross receipts from related activities, etc (See instructions)					12	
13	First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage			
14	Public Support Percentage for 2011 (line 6 column (f) divided by line 11 column (f))	14	
15	Public Support Percentage for 2010 Schedule A, Part II, line 14	15	
16a	33 1/3% support test—2011. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
b	33 1/3% support test—2010. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		
17a	10%-facts-and-circumstances test—2011. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		
b	10%-facts-and-circumstances test—2010. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization		
18	Private Foundation If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions		

Part IIIPart III

Support Schedule for Organizations Described in IRC 509(a)(2)
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support						
Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public Support (Subtract line 7c from line 6.)						

Section B. Total Support						
Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support (Add lines 9, 10c, 11 and 12.)						
14 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage			
15 Public Support Percentage for 2011 (line 8 column (f) divided by line 13 column (f))	15		
16 Public support percentage from 2010 Schedule A, Part III, line 15	16		

Section D. Computation of Investment Income Percentage			
17 Investment income percentage for 2011 (line 10c column (f) divided by line 13 column (f))	17		
18 Investment income percentage from 2010 Schedule A, Part III, line 17	18		
19a 33 1/3% support tests—2011. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization			
b 33 1/3% support tests—2010. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization			
20 Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions			

Part IV **Supplemental Information.** Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Explanation

SCHEDULE D
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2011

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b
Attach to Form 990. See separate instructions.

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I

Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	
2	Aggregate contributions to (during year)	
3	Aggregate grants from (during year)	
4	Aggregate value at end of year	
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	
	☐ Yes ☐ No	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit	
	☐ Yes ☐ No	

Part II

Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)
☐ Preservation of land for public use (e g , recreation or pleasure) ☐ Preservation of an historically importantly land area
☐ Protection of natural habitat ☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a	Total number of conservation easements
b	Total acreage restricted by conservation easements
c	Number of conservation easements on a certified historic structure included in (a)
d	Number of conservation easements included in (c) acquired after 8/17/06

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i)	Revenues included in Form 990, Part VIII, line 1	▶ \$ 299,540
(ii)	Assets included in Form 990, Part X	▶ \$ 4,008,184
2	If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items	
a	Revenues included in Form 990, Part VIII, line 1	▶ \$ _____
b	Assets included in Form 990, Part X	▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

- Public exhibition

Loan or exchange programs
-
- Scholarly research

Other

Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

Yes No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

Yes No

b If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21?

Yes No

b If "Yes," explain the arrangement in Part XIV

Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a Beginning of year balance	119,638,270	100,251,070	91,729,268	115,656,893	
b Contributions	979,032	2,494,549	3,196,968	2,594,260	
c Investment earnings or losses	-1,017,316	23,648,053	11,937,832	-20,063,615	
d Grants or scholarships	2,062,287	2,430,704	2,347,347	2,282,376	
e Other expenditures for facilities and programs	3,244,920	3,894,599	3,863,150	3,881,646	
f Administrative expenses	390,987	430,099	402,501	294,248	
g End of year balance	113,901,792	119,638,270	100,251,070	91,729,268	

2 Provide the estimated percentage of the year end balance held as

- Board designated or quasi-endowment

20 000 %
- Permanent endowment

68 000 %
- Term endowment

12 000 %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

	Yes	No
(i) unrelated organizations	3a(i) Yes	
(ii) related organizations	3a(ii)	No
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIV the intended uses of the organization's endowment funds

Part VI Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		567,618		567,618
b Buildings		147,148,239	41,986,117	105,162,122
c Leasehold improvements		13,998,694	10,233,064	3,765,630
d Equipment		6,278,223	5,196,194	1,082,029
e Other		12,403,596		12,403,596
Total. Add lines 1a-1e <i>(Column (d) should equal Form 990, Part X, column (B), line 10(c).)</i>				122,980,995

Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	102,617,052
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	99,438,631
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	3,178,421
4	Net unrealized gains (losses) on investments	4	-6,779,568
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	-928,185
9	Total adjustments (net) Add lines 4 - 8	9	-7,707,753
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-4,529,332

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	57,990,816
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	-6,779,568
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	250,875
e	Add lines 2a through 2d	2e	-6,528,693
3	Subtract line 2e from line 1	3	64,519,509
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	464,237
b	Other (Describe in Part XIV)	4b	37,633,306
c	Add lines 4a and 4b	4c	38,097,543
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	102,617,052

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	62,520,148
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	250,875
e	Add lines 2a through 2d	2e	250,875
3	Subtract line 2e from line 1	3	62,269,273
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	464,237
b	Other (Describe in Part XIV)	4b	36,705,121
c	Add lines 4a and 4b	4c	37,169,358
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	99,438,631

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
Description of Organization's Collections	Schedule D, Part III, Line 4	THE PERMANENT ART COLLECTION HOUSED IN THE PHILIP AND MURIEL BERMAN MUSEUM OF ART AT URSINUS COLLEGE PROVIDES A VALUABLE CULTURAL RESOURCE FOR THE CAMPUS COMMUNITY. THE MUSEUM, IN CONJUNCTION WITH THE ART DEPARTMENT, INTEGRATES THE RICH RESOURCES PROVIDED BY THE COLLECTION INTO ACADEMIC PROGRAMMING FOCUSING ON IMPORTANT TEXTS RELATED TO THE COLLECTIONS.
Intended Uses of Endowment Funds	Schedule D, Part V, Line 4	ENDOWMENT FUNDS PROVIDE RETURNS THAT ARE USED TO SUPPORT THE OPERATIONS OF THE COLLEGE. SPECIFICALLY, ENDOWMENTS ARE ESTABLISHED TO SUPPORT STUDENT SCHOLARSHIPS AND PRIZES, EDUCATIONAL PROGRAMS, SPECIFIC CAPITAL PURCHASES AND OTHER OPERATIONAL NEEDS.
Liability for Uncertain Tax Position (ASC 740)	Schedule D, Part X, Line 2	THE COLLEGE ACCOUNTS FOR UNCERTAIN TAX POSITIONS, IF ANY, IN ACCORDANCE WITH ASC 740, INCOME TAXES (FASB INTERPRETATION NO. 48, ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES). THE COLLEGE DOES NOT BELIEVE THAT THERE ARE ANY UNRECOGNIZED TAX BENEFITS OR COSTS THAT SHOULD BE RECORDED.
Supplemental Description - Other	Schedule D, Part XI, Line 8	Actuarial Loss on Annuity Liability \$ 928,185
Supplemental Description - Other	Schedule D, Part XII, Line 2d	Fundraising Expenses \$250,875
Supplemental Description - Other	Schedule D, Part XII, Line 4b	Scholarships 35,685,531 Bond Defeasance 1,019,590 Actuarial Loss on Annuity Liability 928,185
Supplemental Description - Other	Schedule D, Part XIII, Line 2d	Fundraising Expenses \$250,875
Supplemental Description - Other	Schedule D, Part XIII, Line 4b	Scholarships 35,685,531 Bond Defeasance 1,019,590

Additional Data

Software ID:
Software Version:
EIN: 23-1177930
Name: Ursinus College

Form 990, Schedule D, Part VII - Investments— Other Securities

(a) Description of security or cateory (including name of security)	(b)Book value	(c) Method of valuation Cost or end-of-year market value
GOLDMAN SACH DIST FUND LP	944,589	F
KOCH TRUST HARVARD MANAGEMENT	880,778	F
LIFE INSURANCE CASH VALUE	717,773	F
LINCOLN ANNUITY - DAVIS #2	265,053	F
MCCAUSLAND CGA-INS POLICIES	111,824	F
MS GLENMEDE TR-BWOOD CHR	179,113	F
OAKTREE CAPITAL MGT DISTR FUND	1,533,376	F
TECHNOLOGY LEADERS II & III	0	F
UBP-SELECTINVEST ARBITRAGE FD	942,895	F
OTHER	9,331	F
HC TOTAL RETURN II OFFSHORE FD	5,182,671	F
HELD BY OTHERS CLAMER	7,114,694	F
HELD BY OTHERS PATTERSON	467,275	F
HELD BY OTHERS SUPERBIBIGHAUS	85,257	F

SCHEDULE E
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Schools

►Complete if the organization answered "Yes" to Form 990, Part IV, line 13,
or Form 990-EZ, Part VI, line 48.
► Attach to Form 990 or Form 990-EZ.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I		YES	NO
1 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	1	Yes	
	2	Yes	
	3	Yes	
	4a	Yes	
2 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	4b	Yes	
	4c	Yes	
	4d	Yes	
	5a		No
3 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe If "No," please explain If you need more space use Part II			

Part III Supplemental Information

Complete this part to provide the explanations required by Part I, lines 3, 4d, 5h, 6b, and 7, as applicable. Also complete this part to provide any other additional information (see instructions).

Identifier	Return Reference	Explanation
Publication of Racially Nondiscriminatory Policy	Schedule E, Part I, Line 3	RACIALLY NONDISCRIMINATORY POLICY. THE COLLEGE'S NON-DISCRIMINATORY POLICY IS INCLUDED IN ALL PRINTED AND BROADCAST ADVERTISING, AS WELL AS IN THE COLLEGE CATALOG. IT IS ALSO POSTED IN VARIOUS LOCATIONS ON CAMPUS.
Government Assistance	Schedule E, Part I, Line 6a	URSINUS COLLEGE RECEIVES FINANCIAL AID/ASSISTANCE FROM VARIOUS FEDERAL (U.S. DEPARTMENT OF EDUCATION) AND STATE (COMMONWEALTH OF PENNSYLVANIA) GOVERNMENTAL AGENCIES INCLUDING PERKINS STUDENT LOAN PROGRAM, COLLEGE WORK STUDY PROGRAMS, AND THE PELL GRANT PROGRAM.

SCHEDULE F
(Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

► Complete if the organization answered "Yes" to Form 990,
Part IV, line 14b, 15, or 16.
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2011

Open to Public
Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I

General Information on Activities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

- 1 For grantmakers. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No
- 2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of grant funds outside the United States
- 3 Activites per Region (Use Part V if additional space is needed)

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region or independent contractors	(d) Activities conducted in region (by type) (e g , fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region/investments in region
East Asia and the Pacific	0	0	Grantmaking		232,290
Europe (Including Iceland and Greenland)	0	0	Grantmaking		144,085
Middle East and North Africa	0	0	Grantmaking		22,355
North America	0	0	Grantmaking		10,000
Russia and the Newly Independent States	0	0	Grantmaking		7,500
South Asia	0	0	Grantmaking		13,000
Central America and the Caribbean	0	0	Program Services	Faculty Development	11,365
East Asia and the Pacific	0	0	Program Services	faculty Development	464
Europe (Including Iceland and Greenland)	0	0	Program Services	Faculty Development	28,230
North America	0	0	Program Services	Faculty Development	4,921
Central America and the Caribbean	0	0	Investments		8,603,532
3a Sub-total	0	0			9,077,742
b Total from continuation sheets to Part I					
c Totals (add lines 3a and 3b)	0	0			9,077,742

[illegible]

3 Enter total number of other organizations or entities ►

Part III

Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 16.
Use Part V if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)
Tuition, Fees to foreign students at UC	East Asia/Pacific	8			232,290	Std Acct CR	FMV
Tuition, Fees to foreign students at UC	Europe/Iceland/Greenland	5			144,085	Std Acct CR	FMV
Tuition, Fees to foreign students at UC	Middle East/North Africa	1			22,355	Std Acct CR	FMV
Tuition, Fees to foreign students at UC	North America	1			10,000	Std Acct CR	FMV
Tuition, Fees to foreign students at UC	Russia	1			7,500	Std Acct CR	FMV
Tuition, Fees to foreign students at UC	South Asia	1			13,000	Std Acct CR	FMV

Part IV Foreign Forms

- 1

Was the organization a U S transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926 (see instructions for Form 926)*

☒ Yes ☐ No
- 2

Did the organization have an interest in a foreign trust during the tax year? *If " Yes," the organization may be required to file Form 3520 and/or Form 3520-A. (see instructions for Forms 3520 and 3520-A)*

☐ Yes ☒ No
- 3

Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with respect to Certain Foreign Corporations. (see instructions for Form 5471)*

☒ Yes ☐ No
- 4

Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see instructions for Form 8621)*

☒ Yes ☐ No
- 5

Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with respect to Certain Foreign Partnerships. (see instructions for Form 8865)*

☐ Yes ☒ No
- 6

Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to file Form 5713, International Boycott Report (see instructions for Form 5713).*

☐ Yes ☒ No

Part V

Supplemental Information
Complete this part to provide the information (see instructions) required in Part I, line 2, and any additional information.

Identifier	Return Reference	Explanation
Procedure for Monitoring Use of Grant Funds Outside U S	Schedule F, Part I, Line 2	URSINUS COLLEGE PROVIDED GRANTS TOTALING \$429,230 TO 17 FOREIGN STUDENTS FOR TUITION, FEES, ROOM AND BOARD TO ATTEND URSINUS COLLEGE. FOREIGN STUDENTS ARE AWARDED GRANTS BASED ON MERIT AND NEED PRIOR TO ARRIVING AT URSINUS COLLEGE. THESE GRANTS ARE APPLIED DIRECTLY TO THE STUDENTS' ACCOUNT AT URSINUS.

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding
Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19,
or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public
Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I Fundraising Activities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
- a ☒ Mail solicitations

e ☒ Solicitation of non-government grants

b ☐ Internet and e-mail solicitations

f ☒ Solicitation of government grants

c ☒ Phone solicitations

g ☒ Special fundraising events

d ☒ In-person solicitations
- 2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?
- ☒ Yes

☐ No
- b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
The Solstice Group 120 Brindley St Ste 7 Ithaca, NY 14850	Trning/Dev		No		57,112	
Total ▶					57,112	

Part II Fundraising Events.

Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events
		Swim Lessons (event type)	Golf Outing (event type)	11 (total number)	(Add col (a) through col (c))
Revenue	1	Gross receipts	40,288	24,203	87,541
	2	Less Charitable contributions		11,465	
	3	Gross income (line 1 minus line 2)	40,288	12,738	87,541
Direct Expenses	4	Cash prizes			
	5	Non-cash prizes			
	6	Rent/facility costs	7,890		7,890
	7	Food and beverages		595	595
	8	Entertainment			
	9	Other direct expenses	3,082	34,525	37,607
	10	Direct expense summary Add lines 4 through 9 in column (d) ▶			(46,092)
	11	Net income summary Combine lines 3 and 10 in column (d). ▶			94,475

Part III Gaming.

Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming
					(Add col (a) through col (c))
Revenue	1	Gross revenue			
	2	Cash prizes			
Direct Expenses	3	Non-cash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
	6	Volunteer labor	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
	7	Direct expense summary Add lines 2 through 5 in column (d) ▶			()
	8	Net gaming income summary Combine lines 1 and 7 in column (d) ▶			

9 Enter the state(s) in which the organization operates gaming activities _____

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," Explain _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," Explain _____

- 11

Does the organization operate gaming activities with nonmembers?

☐ Yes ☐ No
- 12

Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

☐ Yes ☐ No

13

Indicate the percentage of gaming activity operated in

a	The organization's facility	13a	
b	An outside facility	13b	

- 14
- Provide the name and address of the person who prepares the organization's gaming/special events books and records

Name

Address

- 15a

Does the organization have a contract with a third party from whom the organization receives gaming revenue?

☐ Yes ☐ No
- b

If "Yes," enter the amount of gaming revenue received by the organization \$ and the amount of gaming revenue retained by the third party \$
- c

If "Yes," enter name and address

Name

Address

16

Gaming manager information

Name

Gaming manager compensation \$

Description of services provided

☐ Director/officer

☐ Employee

☐ Independent contractor

- 17
- Mandatory distributions
- a

Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?

☐ Yes ☐ No
- b

Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$

Part IV

Complete this part to provide additional information for responses to question on Schedule G (see instructions.)

Identifier	ReturnReference	Explanation
Amount Paid to Fundraiser	Schedule G, Part I Col (v)	The fees paid to The Solstice Group include \$49,125 for services and \$7,987 for direct reimbursed expenses

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
Ursinus College

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990

OMB No 1545-0047

2011

Open to Public
Inspection

Employer identification number

23-1177930

Part I

General Information on Grants and Assistance

- 1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No
- 2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II

Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ▶ ☐

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance

2

Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶

3

Enter total number of other organizations listed in the line 1 table ▶

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 22.
Use Schedule I-1 (Form 990) if additional space is needed.

(a)Type of grant or assistance	(b)Number of recipients	(c)Amount of cash grant	(d)Amount of non-cash assistance	(e)Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance
(1) Financial Aid - Summer Programs	121		78,540	FMV	Housing
(2) Scholarships and Financial Aid	1622		35,418,105	FMV	Tuition, Fees
(3) Stipends	85	234,788		FMV	Stipends

Part IV

Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

Identifier	Return Reference	Explanation
Procedure for Monitoring Use of Grant Funds Inside U S	Schedule I, Part I, Line 2	URSINUS COLLEGE PROVIDED GRANTS TOTALING \$78,540 TO 121 URSINUS COLLEGE STUDENTS IN GOOD ACADEMIC STANDING FOR CAMPUS HOUSING, PRIMARILY FOR SUMMER RESEARCH THE GRANTS ARE APPLIED DIRECTLY TO THE STUDENTS' ACCOUNTS AT URSINUS COLLEGE URSINUS COLLEGE PROVIDED GRANTS TOTALING \$35,418,105 TO 1,622 URSINUS COLLEGE STUDENTS IN GOOD ACADEMIC STANDING FOR TUITION, FEES, ROOM AND BOARD FOR THE ACADEMIC YEAR 2011-12 THE GRANTS ARE APPLIED DIRECTLY TO THE STUDENTS' ACCOUNTS AT URSINUS COLLEGE URSINUS COLLEGE PROVIDED GRANTS TOTALING \$234,788 TO 85 URSINUS COLLEGE STUDENTS IN GOOD ACADEMIC STANDING FOR STIPENDS WHILE ENGAGED IN SUMMER RESEARCH PROJECTS ON CAMPUS THE STIPENDS ARE DISBURSED VIA PAYROLL TO THE INDIVIDUAL STUDENTS

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2011

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I

Questions Regarding Compensation

		Yes	No
1a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items		
	☐ First-class or charter travel ☒ Housing allowance or residence for personal use		
	☐ Travel for companions ☐ Payments for business use of personal residence		
	☐ Tax idemnification and gross-up payments ☒ Health or social club dues or initiation fees		
	☐ Discretionary spending account ☒ Personal services (e g , maid, chauffeur, chef)		
b	If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain		No
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	Yes	
3	Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply		
	☒ Compensation committee ☐ Written employment contract		
	☐ Independent compensation consultant ☒ Compensation survey or study		
	☒ Form 990 of other organizations ☒ Approval by the board or compensation committee		
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization		
a	Receive a severance payment or change-of-control payment?	Yes	
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	Yes	
c	Participate in, or receive payment from, an equity-based compensation arrangement?		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III		
	Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.		
5	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of		
a	The organization?		No
b	Any related organization?		No
	If "Yes," to line 5a or 5b, describe in Part III		
6	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of		
a	The organization?		No
b	Any related organization?		No
	If "Yes," to line 6a or 6b, describe in Part III		
7	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III		No
8	Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III		No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?		

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, columns (D) and (E) for that individual

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) Winfield L Guilmette	(i)	195,413	0	0	13,562	4,514	213,489	0
	(ii)	0	0	0	0	0	0	0
(2) Richard Difeliciantonio	(i)	162,480	0	20,825	12,075	21,747	217,127	0
	(ii)	0	0	0	0	0	0	0
(3) Judith T Levy	(i)	174,730	0	0	12,285	5,788	192,803	0
	(ii)	0	0	0	0	0	0	0
(4) Jill A Marsteller	(i)	253,552	0	14,473	17,150	1,236	286,411	0
	(ii)	0	0	0	0	0	0	0
(5) John P King	(i)	148,109	0	0	10,647	57,796	216,552	0
	(ii)	0	0	0	0	0	0	0
(6) James L Baer	(i)	135,470	0	0	9,555	7,915	152,940	0
	(ii)	0	0	0	0	0	0	0
(7) Laura Moliken	(i)	120,734	0	0	9,170	21,291	151,195	0
	(ii)	0	0	0	0	0	0	0
(8) Bobby Fong	(i)	190,501	0	1,329	25,641	23,540	241,011	0
	(ii)	0	0	0	0	0	0	0
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III **Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
Housing allowance or residence for personal use	Schedule J, Part I, Line 1a	HOUSING AND CLEANING SERVICES WERE PROVIDED TO THE COLLEGE PRESIDENT AS A CUSTOMARY BENEFIT PROVIDED BY INSTITUTIONS OF HIGHER LEARNING. NO PART OF THE HOUSING OR CLEANING WAS TREATED AS TAXABLE COMPENSATION. THE COLLEGE PROVIDES PAYMENT OF THE PRESIDENT'S COUNTRY CLUB DUES. THE MEMBERSHIP IS USED EXCLUSIVELY FOR COLLEGE-RELATED PURPOSES, AND IS THEREFORE EXCLUDED FROM THE PRESIDENT'S FORM W-2 WAGES. CLEANING SERVICES FOR THE PRESIDENT'S HOUSE, AS MENTIONED IN LINE 11 ABOVE. THE COLLEGE IS CONSIDERING THE ADOPTION OF A POLICY REGARDING PAYMENT/REIMBURSEMENT OF EXPENSES. Sterling Garcia received a severance payment of \$75,000. DR. FONG PARTICIPATED IN A DEFERRED COMPENSATION PLAN, WHICH IS REPORTED IN SCHEDULE J, PART II, COLUMN C.
Health or social club dues or initiation fees	Schedule J, Part I, Line 1a	THE COLLEGE PROVIDES PAYMENT OF THE PRESIDENT'S COUNTRY CLUB DUES. THE MEMBERSHIP IS USED EXCLUSIVELY FOR COLLEGE-RELATED PURPOSES, AND IS THEREFORE EXCLUDED FROM THE PRESIDENT'S FORM W-2 WAGES.
Personal services (e.g., mail, chauffeur, chef)	Schedule J, Part I, Line 1a	CLEANING SERVICES FOR THE PRESIDENT'S HOUSE, AS MENTIONED IN LINE 11 ABOVE.
Written policy regarding payment or reimbursement	Schedule J, Part I, Line 1b	THE COLLEGE IS CONSIDERING THE ADOPTION OF A POLICY REGARDING PAYMENT/REIMBURSEMENT OF EXPENSES.
Severance or change of control	Schedule J, Part I, Line 4a	Sterling Garcia received a severance payment of \$75,000.
Supplemental nonqualified retirement plan	Schedule J, Part I, Line 4b	DR. FONG PARTICIPATED IN A DEFERRED COMPENSATION PLAN, WHICH IS REPORTED IN SCHEDULE J, PART II, COLUMN C.

Schedule K (Form 990) Department of the Treasury Internal Revenue Service Name of the organization Ursinus College	Supplemental Information on Tax Exempt Bonds ▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Schedule O (Form 990). ▶ Attach to Form 990. ▶ See separate instructions.	OMB No 1545-0047
		2011
		Open to Public Inspection
Employer identification number		23-1177930

Part I Bond Issues											
(a) Issuer Name	(b) Issuer EIN	(c) CUSIP #	(d) Date Issued	(e) Issue Price	(f) Description of Purpose	(g) Defeased		(h) On Behalf of Issuer		(i) Pool financing	
						Yes	No	Yes	No	Yes	No
A PHEFA	23-2243852	70917N2Q0	10-21-2003	40,723,967	Perf Arts Ctr & Facilities		X		X		X
B PHEFA	23-2243852	70917PFZ7	02-01-2006	14,164,259	Residence Hall & Facilities		X		X		X
C PHEFA	23-2243852	70917R6A8	05-21-2012	19,896,653	Advance Refinance of Bonds		X		X		X

Part II Proceeds											
				A	B	C	D				
1	Amount of bonds retired			25,480,000	0	18,635,000					
2	Amount of bonds defeased			0	0	0					
3	Total proceeds of issue			41,024,185	14,455,112	19,896,653					
4	Gross proceeds in reserve funds			1,366,010	1,243,576	1,369,050					
5	Capitalized interest from proceeds			0	0	0					
6	Proceeds in refunding escrow			27,852,895	0	20,029,220					
7	Issuance costs from proceeds			522,540	443,329	356,268					
8	Credit enhancement from proceeds			1,179,935	703,986	0					
9	Working capital expenditures from proceeds			0	0	0					
10	Capital expenditures from proceeds			10,102,740	12,064,149	0					
11	Other spent proceeds			0	0	0					
12	Other unspent proceeds			0	0	0					
13	Year of substantial completion			2004	2007	2012					
14	Were the bonds issued as part of a current refunding issue?			Yes	No	Yes	No	Yes	No	Yes	No
				X			X		X		
15	Were the bonds issued as part of an advance refunding issue?			X		X		X			
16	Has the final allocation of proceeds been made?			X		X		X			
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?			X		X		X			

Part III Private Business Use											
				A		B		C		D	
				Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?				X		X		X		
2	Are there any lease arrangements that may result in private business use of bond-financed property?				X		X		X		

Part III

Private Business Use (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
3a	Are there any management or service contracts that may result in private business use?		X		X		X		
b	If 'Yes' to line 3a, does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts relating to the financed property?	X		X					
c	Are there any research agreements that may result in private business use of bond-financed property?		X		X		X		
d	If 'Yes' to line 3c, does the organization routinely engage bond counsel or other outside counsel to review any research agreements relating to the financed property?	X		X					
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government	0 %		0 %		0 %			
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government								
6	Total of lines 4 and 5								
7	Has the organization adopted management practices and procedures to ensure the post-issuance compliance of its tax-exempt bond liabilities?	X		X		X			

Part IV

Arbitrage

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has a Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate, been filed with respect to the bond issue?		X		X		X		
2	Is the bond issue a variable rate issue?		X		X		X		
3a	Has the organization or the governmental issuer entered into a hedge with respect to the bond issue?		X	X			X		
b	Name of provider	0		JP MORGAN		0			
c	Term of hedge			0					
d	Was the hedge superintegrated?				X				
e	Was a hedge terminated?			X					
4a	Were gross proceeds invested in a GIC?	X			X		X		
b	Name of provider	West LB		0		0			
c	Term of GIC	23 17							
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?	X							
5	Were any gross proceeds invested beyond an available temporary period?		X		X		X		
6	Did the bond issue qualify for an exception to rebate?		X		X		X		

Part V

Procedures To Undertake Corrective Action

Check the box if the organization established written procedures to ensure that violations of federal tax requirements are timely identified and corrected through the voluntary closing agreement program if self-remediation is not available under applicable regulations ☐ Yes ☒ No

Part VI

Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule K (see instructions)

Identifier	Return Reference	Explanation
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Schedule L
(Form 990 or 990-EZ)

Transactions with Interested Persons
▶ Complete if the organization answered
"Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c,
or Form 990-EZ, Part V lines 38a or 40b.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047
2011
Open to Public Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I

Excess Benefit Transactions (section 501(c)(3) and section 501 (c)(4) organizations only).
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$

Part II

Loans to and/or From Interested Persons.
Complete if the organization answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c)Original principal amount	(d)Balance due	(e) In default?		(f) Approved by board or committee?		(g)Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
(1) Jill A Marsteller		X	19,607	4,883		No		No	Yes	
Total				4,883						

Part III

Grants or Assistance Benefitting Interested Persons.
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b)Relationship between interested person and the organization	(c)Amount of grant or type of assistance
(1) Trustees	Trustees	29,000
(2) Substantial Contributor	Substantial Contributor	7,500

Part IV

Business Transactions Involving Interested Persons.
Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No

Part V

Supplemental Information
Complete this part to provide additional information for responses to questions on Schedule L (see instructions)

Identifier	Return Reference	Explanation
Grants to Interested Persons	Schedule L, Part III	Grants for tuition and fees are provided on the same criteria for all students based on academic achievement and financial need

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

NonCash Contributions

►Complete if the organization answered "Yes" on Form 990, Part IV, lines 29 or 30.
► Attach to Form 990.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I Types of Property

	(a) Check if applicable	(b) Number of Contributions or items contributed	(c) Contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining contribution amounts
1 Art—Works of art	X	27	299,540	Estimated Value
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods	X		1,500	Selling Price
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	27	298,008	FMV @date of gift
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
Scientific				
25 Other ► (<u>Equipment</u>)	X	2	13,247	Estimated Value
Athletic				
26 Other ► (<u>Equipment</u>)	X	2	27,592	Cost
27 Other ► (_____)				
28 Other ► (_____)				
29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement			29	27

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?		No
b If "Yes," describe the arrangement in Part II		
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?	Yes	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell non-cash contributions?	Yes	
b If "Yes," describe in Part II		
33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II		

Part III

Supplemental Information. Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
Third Party Assistance of Noncash Contributions	Schedule M, Line 32a	Ursinus College engages Morgan Stanley Smith Barney for the sale of securities received as contributions

2011

Open to Public Inspection

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

**Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.**
► Attach to Form 990 or 990-EZ.

Name of the organization
Ursinus College

Employer identification number

23-1177930

Identifier	Return Reference	Explanation
Form 990 Review Process	Form 990, Part VI, Line 11b	The completed Form 990 is distributed and reviewed prior to filing at a specially-convened meeting of the audit committee of the Board of Directors. The completed Form 990 was made available to the full board.
Conflict of Interest Policy Monitoring & Enforcement	Form 990, Part VI, Line 12c	Trustees or officers complete a conflict of disclosure statement annually. Those who have a conflict of interest are asked to refrain from participating in consideration of proposed transactions, unless for special reasons the board or administration requests information or interpretation. Persons with conflicts shall not vote, participate in discussion, or be present at the time of vote.
Process for Determining Compensation	Form 990, Part VI, Line 15a	The Associate Vice President for Finance & Controller of Ursinus College conducts a study each year of the salaries and benefits for the President, Chief Academic Officer, Chief Business Officer, Chief Development Officer, Chief Enrollment Officer, and Dean of Student Life. The study documents the salaries and benefits of those in similar positions in the other Centennial Conference Colleges: Bryn Mawr, Dickinson, Franklin & Marshall, Gettysburg, Haverford, McDaniel, Muhlenberg, Swarthmore and Washington. The study presents the data as both tables and graphs. The executive committee of the Board of Trustees determines the compensation of the President of the College and reviews and approves the compensation recommendations of the President for the other officers. The study prepared by the Associate Vice President for Finance & Controller is provided to the chair of the Board as supporting documentation for the discussion of compensation in the executive committee meeting. The results of the deliberation process were documented in employment letters sent to employees.
How Documents are Made Available to the Public	Form 990, Part VI, Line 19	Ursinus makes its governing documents, conflict of interest policy, and financial statements available to the public upon request. Financial statements are also available on the College's website.
EXPLANATION FOR AMENDING		Ursinus College is amending its Form 990 for fiscal year-ended June 30, 2012, to properly report certain components of compensation for Key Employee, Richard DiFelicianantonio, that had been erroneously double-counted in its original filing. Specifically, the originally filed 2011 Form 990 included tuition benefit disbursed through payroll, in both Part VII, Column D (correctly) and in Part VII Column F (incorrectly). In addition, Schedule J, Column D had been overstated by \$20,825, as this figure had also been included in Schedule J, Column B. Accordingly, Ursinus College is amending its Form 990 for the fiscal year-ended June 30, 2012 to adjust Part VII and Schedule J for the double-counting of the tuition benefit disbursement for Richard DiFelicianantonio" and properly report the amounts in Part VII, Column F and Schedule J, Column B.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
Ursinus College

Employer identification number
23-1177930

Part I

Identification of Disregarded Entities (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II

Identification of Related Tax-Exempt Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled organization	
						Yes	No

Part III

Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of- year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
See Additional Data Table							

Part V

Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, 35A, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III or IV

1

During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

a

Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity

b

Gift, grant, or capital contribution to related organization(s)

c

Gift, grant, or capital contribution from related organization(s)

d

Loans or loan guarantees to or for related organization(s)

e

Loans or loan guarantees by related organization(s)

f

Sale of assets to related organization(s)

g

Purchase of assets from related organization(s)

h

Exchange of assets with related organization(s)

i

Lease of facilities, equipment, or other assets to related organization(s)

j

Lease of facilities, equipment, or other assets from related organization(s)

k

Performance of services or membership or fundraising solicitations for related organization(s)

l

Performance of services or membership or fundraising solicitations by related organization(s)

m

Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)

n

Sharing of paid employees with related organization(s)

o

Reimbursement paid to related organization(s) for expenses

p

Reimbursement paid by related organization(s) for expenses

q

Other transfer of cash or property to related organization(s)

r

Other transfer of cash or property from related organization(s)

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	(b) Transaction type(a-r)	(c) Amount involved	(d) Method of determining amount involved
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]

Part VII

Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions)

Identifier	Return Reference	Explanation	
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Software ID:

Software Version:

EIN: 23-1177930

Name: Ursinus College

Form 990, Schedule R, Part IV - Identification of Related Organizations Taxable as a Corporation or Trust

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal Domicile (State or Foreign Country)	(d) Direct Controlling Entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income (\$)	(g) Share of end-of-year assets (\$)	(h) Percentage ownership
A & J B Charitable Remainder Unitrust PO Box 1000 Collegeville, PA 194261000 25-6741464	CRUT	PA	Ursinus	Trust		51,936	100 000 %
R & J B Irrevocable Unitrust PO Box 1000 Collegeville, PA 194261000 35-1866676	CRUT	PA	Ursinus	Trust		40,831	100 000 %
LBB Unitrust PO Box 1000 Collegeville, PA 194261000 23-7908029	CRUT	PA	Ursinus	Trust		503,089	100 000 %
FKB I Irrevocable Unitrust PO Box 1000 Collegeville, PA 194261000 23-7792047	CRUT	PA	Ursinus	Trust		280,741	100 000 %
FKB 2 Irrevocable Unitrust PO Box 1000 Collegeville, PA 194261000 23-7876947	CRUT	PA	Ursinus	Trust		121,134	100 000 %
MB Irrevocable Unitrust PO Box 1000 Collegeville, PA 194261000 23-7977969	CRUT	PA	Ursinus	Trust		54,877	100 000 %
NBC Charitable Remainder Unitrust 2003 PO Box 1000 Collegeville, PA 194261000 06-1707189	CRUT	PA	Ursinus	Trust		89,514	100 000 %
TG & NBD Unitrust #1 PO Box 1000 Collegeville, PA 194261000 04-6609384	NIMCRUT	PA	Ursinus	Trust		465,840	100 000 %
B & K H CRUT PO Box 1000 Collegeville, PA 194261000 23-7985311	CRUT	PA	Ursinus	Trust		87,216	100 000 %
TG & NBD Irrevocable Unitrust #2 PO Box 1000 Collegeville, PA 194261000 35-1877131	NIMCRUT	PA	Ursinus	Trust		265,053	100 000 %
JRH III CRUT PO Box 1000 Collegeville, PA 194261000 20-6592857	CRUT	PA	Ursinus	Trust		173,070	100 000 %
DEP Irrevocable Unitrust PO Box 1000 Collegeville, PA 194261000 35-1843690	NIMCRUT	PA	Ursinus	Trust		331,301	100 000 %
DE & J P CRAT 2003 PO Box 1000 Collegeville, PA 194261000 20-6150264	CRAT	PA	Ursinus	Trust		8,862	100 000 %
DE & J P CRAT 2004 PO Box 1000 Collegeville, PA 194261000 20-2431466	CRAT	PA	Ursinus	Trust		8,967	100 000 %
D & J P CRAT 2005 PO Box 1000 Collegeville, PA 194261000 20-3933584	CRAT	PA	Ursinus	Trust		9,119	100 000 %
D & J P CRAT 2006 PO Box 1000 Collegeville, PA 194261000 20-5953832	CRAT	PA	Ursinus	Trust		8,472	100 000 %
D & J P CRAT 2007 PO Box 1000 Collegeville, PA 194261000 26-6092894	CRAT	PA	Ursinus	Trust		8,971	100 000 %
D & J P CRAT 2008 PO Box 1000 Collegeville, PA 194261000 26-6419431	CRAT	PA	Ursinus	Trust		9,075	100 000 %
D & J P CRAT 2009 PO Box 1000 Collegeville, PA 194261000 27-6425823	CRAT	PA	Ursinus	Trust		10,597	100 000 %
D & J P CRAT 2010 PO Box 1000 Collegeville, PA 194261000 27-6941685	CRAT	PA	Ursinus	Trust		9,517	100 000 %

Form 990, Schedule R, Part IV - Identification of Related Organizations Taxable as a Corporation or Trust

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal Domicile (State or Foreign Country)	(d) Direct Controlling Entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income (\$)	(g) Share of end-of-year assets (\$)	(h) Percentage ownership
R & S R CRUT PO Box 1000 Collegeville, PA 194261000 25-6681759	CRUT	PA	Ursinus	Trust		74,635	100 000 %
RT & KKS Irrevocable Trust PO Box 1000 Collegeville, PA 194261000 35-1924645	CRUT	PA	Ursinus	Trust		62,768	100 000 %
EC & NBS Unitrust PO Box 1000 Collegeville, PA 194261000 35-6513280	CRUT	IN	Ursinus	Trust		55,008	100 000 %
A & J S Unitrust PO Box 1000 Collegeville, PA 194261000 25-6669326	CRUT	PA	Ursinus	Trust		238,103	100 000 %
JS Fam Crut PO Box 1000 Collegeville, PA 194261000 20-7128566	NICRUT	PA	Ursinus	Trust		43,502	100 000 %
AGS CRUT 2004 PO Box 1000 Collegeville, PA 194261000 20-2431457	CRUT	PA	Ursinus	Trust		60,528	100 000 %
MHT CRUT 2004 PO Box 1000 Collegeville, PA 194261000 20-1937936	CRUT	PA	Ursinus	Trust		41,150	100 000 %
ASW CRUT 2004 PO Box 1000 Collegeville, PA 194261000 56-6640458	CRUT	CA	Ursinus	Trust		338,021	100 000 %
ASW CRUT 2009 PO Box 1000 Collegeville, PA 194261000 27-6070341	CRUT	CA	Ursinus	Trust		587,724	100 000 %
Ursinus College Pooled Income Fund PO Box 1000 Collegeville, PA 194261000 23-6732370	PIF	PA	Ursinus	Trust		410,012	100 000 %