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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

TO SERVE AS THE CHARITABLE FUNDRAISING ARM OF EDWARD HOSPITAL & HEALTH SERVICES

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 \$ 45,304 including grants of \$ 45,304) (Revenue \$)

THE NURSING PROFESSIONAL DEVELOPMENT FUND IS A VEHICLE FOR ADVANCING THEIR PRACTICE THROUGH ATTENDANCE AT ON-SITE PROGRAMS, OFF-SITE CONFERENCES AND SEMINARS AND IN-HOUSE EDUCATIONAL SESSIONS. WE CONTINUE TO FOCUS ON INCREASING THE NUMBER OF NURSES CERTIFIED IN THEIR AREA OF EXPERTISE. RESEARCH SUGGESTS THAT CERTIFICATION ENHANCES PATIENT CARE AND IMPROVES OUTCOMES. WITH THE NEW ILLINOIS NURSE PRACTICE ACT, OUR 1,200 EDWARD HOSPITAL NURSES ARE NOW REQUIRED TO EARN 20 CONTACT HOURS EVERY TWO YEARS FOR LICENSURE. THIS HAS INCREASED NURSE REQUESTS TO PARTICIPATE IN CONTINUING EDUCATION ACTIVITIES AND HAS ALSO INCREASED ATTENDANCE AT OUR INTERNAL PROGRAMS. THE NURSING PROFESSIONAL DEVELOPMENT FUND ALLOWED NURSES TO ATTEND 123 EXTERNAL CONFERENCES AND SEMINARS IN FY2012. IN ADDITION, THE FUND SUPPORTED 21 IN-HOUSE EDUCATIONAL SESSIONS.

4b

(Code) (Expenses \$ 43,193 including grants of \$ 43,193) (Revenue \$)

THE FOUNDATION FUNDED THE ANIMAL ASSISTED THERAPY PROGRAM. THIS PROGRAM PROVIDES OPPORTUNITIES FOR MOTIVATIONAL, EDUCATIONAL, RECREATIONAL, AND/OR THERAPEUTIC BENEFITS TO ENHANCE QUALITY OF LIFE. SPECIFICALLY TRAINED PROFESSIONALS, AND/OR VOLUNTEERS IN ASSOCIATION WITH ANIMALS THAT MEET SPECIFIC CRITERIA, DELIVER ATT. ATT IS DESIGNED TO PROMOTE IMPROVEMENT IN HUMAN PHYSICAL, SOCIAL, EMOTIONAL, AND COGNITIVE FUNCTION. THIS PROGRAM HAS REACHED OVER 1,000 PATIENTS AT EDWARD HOSPITAL.

4c

(Code) (Expenses \$ 34,400 including grants of \$ 34,400) (Revenue \$)

THE FOUNDATION FUNDED THE CARE CENTER, A CLINIC FOR THE DIAGNOSIS, TREATMENT AND LEGAL DOCUMENTATION OF SEXUALLY ABUSED CHILDREN, THE ONLY CENTER OF ITS KIND IN THE REGION, SERVING A SIX-COUNTY AREA. THE CARE CENTER WORKS AS PART OF A CONTINUUM OF CARE WITH SOCIAL SERVICE AGENCIES AND, WORKING WITH STATE'S ATTORNEYS' OFFICES, ALSO ASSISTS IN THE SUCCESSFUL PROSECUTION OF SEXUAL PREDATORS. A TOTAL OF 86 CLIENTS WERE SERVED IN CALENDAR YEAR 2011. SHORT TERM OBJECTIVES INCLUDE INCREASING CENSUS THROUGH RE-EDUCATION OF REFERRING AGENCIES AND LAW ENFORCEMENT. CONSTANT RE-TRAINING IS NEEDED BECAUSE OF STAFF TURNOVER AT THESE AGENCIES. LONGER TERM OBJECTIVES INCLUDE INCREASING THE CLINIC AVAILABILITY AS CURRENTLY THERE IS ONE CLINIC DAY PER WEEK FOR APPOINTMENTS PLUS EMERGENCY ROOM VISITS. THERE WILL ALSO BE AN EXAM ROOM ADDED IN THE PLANNED REMODELING OF THE PEDIATRICS AREA AND THIS WILL BE USED AS NEEDED TO CROSS-TRAIN PEDIATRIC NURSES TO WORK WITH SEXUAL ABUSE CASES.

(Code) (Expenses \$ 3,381,492 including grants of \$ 3,381,492) (Revenue \$)

OTHER ACTIVITIES RELATED TO RECEIVING DONATIONS AND DISTRIBUTING FUNDS IN ACCORDANCE WITH DONOR INTENT IN SUPPORT OF 501(C)(3) HEALTH CARE ORGANIZATIONS THAT ARE AFFILIATED WITH EDWARD HEALTH SERVICES CORPORATION

4d

Other program services (Describe in Schedule O)

(Expenses \$ 3,381,492 including grants of \$ 3,381,492) (Revenue \$)

4e

Total program service expenses \$ 3,504,389

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. | Yes | |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? | 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. | | 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. | | 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. | | |
| 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. | | 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. | | No |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III. | 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. | | 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. | 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. | | No |
| 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. | | No |
| 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. | | 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. | | No |
| e | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X. | 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. | 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. | | No |
| 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. | Yes | |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E. | | No |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | | 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. | | No |
| 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. | | 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. | | No |
| 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. | | No |
| 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. | 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. | | No |
| 20a | Did the organization operate one or more hospitals? If "Yes," complete Schedule H. | | 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 | Yes | |
| 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 | | No |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| 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 | | |
| d | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | 24d | | |
| 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 | | No |
| 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 | | No |
| 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 | | No |
| 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 | | | Yes | No |
|---|---|------|-----|----|
| Check if Schedule O contains a response to any question in this Part V <input type="checkbox"/> | | | | |
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. . | 1a19 | | |
| b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable. | 1b0 | | |
| 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, Transmittal of Wage and Tax Statements filed for the calendar year ending with or within the year covered by this return. . | 2a0 | | |
| 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 | | |
| 3a | Did the organization have unrelated business gross income of \$1,000 or more during the year? | 3a | | No |
| b | If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O. | 3b | | |
| 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). | 7a | Yes | |
| 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? | 7b | Yes | |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | 7c | | No |
| c | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282? | 7d | | |
| d | If "Yes," indicate the number of Forms 8282 filed during the year. | | | |
| 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. | 9a | | |
| a | Did the organization make any taxable distributions under section 4966? | 9b | | |
| b | Did the organization make a distribution to a donor, donor advisor, or related person? | | | |
| 10 | Section 501(c)(7) organizations. Enter | 10a | | |
| a | Initiation fees and capital contributions included on Part VIII, line 12. | 10b | | |
| b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities. | | | |
| 11 | Section 501(c)(12) organizations. Enter | 11a | | |
| a | Gross income from members or shareholders. | 11b | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them). | | | |
| 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. | 13a | | |
| 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. | 13b | | |
| 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. | 13c | | |
| c | Enter the aggregate amount of reserves on hand. | | | |
| 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 | 13 | | |
| b | Enter the number of voting members included in line 1a, above, who are independent | 1b | 11 |
| 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 | Yes |
| 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 | Yes |
| 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 | Yes |
| 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 | Yes |
| 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 IL |
| 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. <input type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> 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. Vince Pryor 801 South Washington Street Naperville, IL 60540 (630) 527-3000 |

Part VII

Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

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

| (A) Name and Title | (B) Average hours per week (describe hours for related organizations in Schedule O) | (C) Position (do not check more than one box, unless person is both an officer and a director/trustee) | | | | | | (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 | | | |
| (1) DENNIS BURKE Trustee/Chairman | 1 00 | X | | X | | | | 0 | 0 | 0 |
| (2) FRANK SLOCUMB Trustee/Vice Chairman | 1 00 | X | | X | | | | 0 | 288 | 0 |
| (3) PAMELA M DAVIS Trustee/President | 1 00 | X | | X | | | | 0 | 1,150,015 | 260,518 |
| (4) BONNIE VALIANT Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (5) DONALD NIERMEYER Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (6) JOSEPH JUDD Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (7) JULIE COLE CHIRICO Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (8) PHILLIP GRESH Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (9) RICHARD ANDERSON MD Trustee | 1 00 | X | | | | | | 0 | 1,684 | 0 |
| (10) ROBERT BEYER Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (11) RONALD NYBERG Trustee | 1 00 | X | | | | | | 1,908 | 0 | 0 |
| (12) SCOTT BERGER MD Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (13) WILLIAM PETTY Trustee | 1 00 | X | | | | | | 0 | 0 | 0 |
| (14) BARBARA P BYRNE MD Vice President | 1 00 | | | X | | | | 0 | 360,791 | 110,623 |
| (15) BRIAN P DAVIS Vice President | 1 00 | | | X | | | | 0 | 258,926 | 36,856 |
| (16) DANIEL H BECK Vice President | 1 00 | | | X | | | | 0 | 129,433 | 16,838 |
| (17) DENNISE VAUGHN Vice President | 1 00 | | | X | | | | 0 | 279,344 | 31,108 |

Part VII

| | | | | | |
|-----------|--|----------|-------|-----------|---------|
| 1b | Sub-Total | ▼ | | | |
| c | Total from continuation sheets to Part VII, Section A | ▼ | | | |
| d | Total (add lines 1b and 1c) | ▼ | 1,908 | 2,870,978 | 652,988 |

2 Total number of individuals (including but not limited to those listed in Item 1) who received more than \$100,000 of reportable compensation from the organization. 0

| | | 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> | | 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> | 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> | | 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 |
|----------------------------------|--------------------------------|---------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

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 ►0

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 | 734,673 | | | | |
| | d | Related organizations | 1d | | | | | |
| | e | Government grants (contributions) | 1e | | | | | |
| | f | All other contributions, gifts, grants, and similar amounts not included above | 1f | 1,356,882 | | | | |
| | g | Noncash contributions included in lines 1a-1f \$ 225,283 | | | | | | |
| | h | Total. Add lines 1a-1f | | 2,091,555 | | | | |
| Program Service Revenue | | | Business Code | | | | | |
| | 2a | 0 | | 0 | | | | |
| | b | 0 | | 0 | | | | |
| | c | 0 | | 0 | | | | |
| | d | 0 | | 0 | | | | |
| | e | 0 | | 0 | | | | |
| | f | All other program service revenue | | 0 | 0 | 0 | 0 | |
| | g | Total. Add lines 2a-2f | | 0 | | | | |
| Other Revenue | 3 | Investment income (including dividends, interest and other similar amounts) | | 155,036 | | | 155,036 | |
| | 4 | Income from investment of tax-exempt bond proceeds . . | | 0 | | | | |
| | 5 | Royalties | | 0 | | | | |
| | 6a | (i) Real | | (ii) Personal | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | b | Less rental expenses | | | | | | |
| | c | Rental income or (loss) | 0 | 0 | | | | |
| | d | Net rental income or (loss) | | 0 | | | | |
| | 7a | (i) Securities | | (ii) Other | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | b | Less cost or other basis and sales expenses | 1,101,924 | | | | | |
| | c | Gain or (loss) | -127,924 | 0 | | | | |
| | d | Net gain or (loss) | | -127,924 | | | | -127,924 |
| | 8a | Gross income from fundraising events (not including \$ 734,673 of contributions reported on line 1c) See Part IV, line 18 | | | | | | |
| | | a | 116,083 | | | | | |
| | | b | Less direct expenses | 321,572 | | | | |
| | c | Net income or (loss) from fundraising events . . | | -205,489 | | | | -205,489 |
| | 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 | 0 | | 0 | | | | | |
| b | 0 | | 0 | | | | | |
| c | 0 | | 0 | | | | | |
| d | All other revenue | | 0 | 0 | 0 | 0 | | |
| e | Total. Add lines 11a-11d | | 0 | | | | | |
| 12 | Total revenue. See Instructions | | | 1,913,178 | 0 | 0 | -178,377 | |

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 | 3,463,389 | 3,463,389 | | |
| 2 | Grants and other assistance to individuals in the United States See Part IV, line 22 | 41,000 | 41,000 | | |
| 3 | Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16 | 0 | | | |
| 4 | Benefits paid to or for members | 0 | | | |
| 5 | Compensation of current officers, directors, trustees, and key employees | 0 | | | |
| 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 | 0 | | | |
| 8 | Pension plan contributions (include section 401(k) and section 403(b) employer contributions) | 0 | | | |
| 9 | Other employee benefits | 0 | | | |
| 10 | Payroll taxes | 0 | | | |
| 11 | Fees for services (non-employees) | | | | |
| a | Management | 0 | | | |
| b | Legal | 0 | | | |
| c | Accounting | 0 | | | |
| d | Lobbying | 0 | | | |
| e | Professional fundraising See Part IV, line 17 | 0 | | | |
| f | Investment management fees | 1,822 | | 1,822 | |
| g | Other | 139,790 | | 139,790 | |
| 12 | Advertising and promotion | 52,039 | | | 52,039 |
| 13 | Office expenses | 42,957 | | 42,957 | |
| 14 | Information technology | 3,887 | | 3,887 | |
| 15 | Royalties | 0 | | | |
| 16 | Occupancy | 0 | | | |
| 17 | Travel | 6,763 | | 6,763 | |
| 18 | Payments of travel or entertainment expenses for any federal, state, or local public officials | 0 | | | |
| 19 | Conferences, conventions, and meetings | 0 | | | |
| 20 | Interest | 0 | | | |
| 21 | Payments to affiliates | 0 | | | |
| 22 | Depreciation, depletion, and amortization | 0 | | | |
| 23 | Insurance | 0 | | | |
| 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 | DUES & SUBSCRIPTIONS | 4,407 | | 4,407 | |
| b | EDUCATION | 3,679 | | 3,679 | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| f | All other expenses | 0 | 0 | 0 | 0 |
| 25 | Total functional expenses. Add lines 1 through 24f | 3,759,733 | 3,504,389 | 203,305 | 52,039 |
| 26 | Joint costs. Check here <input type="checkbox"/> 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 | 0 | | | |

Part X

Balance Sheet

| | | | | | (A) | | (B) |
|-----------------------------|---|---|-----|---|-------------------|-----|-------------|
| | | | | | Beginning of year | | End of year |
| Assets | 1 | Cash—non-interest-bearing | | | 214,970 | 1 | 16,366 |
| | 2 | Savings and temporary cash investments | | | | 2 | |
| | 3 | Pledges and grants receivable, net | | | 920,279 | 3 | 783,988 |
| | 4 | Accounts receivable, net | | | | 4 | |
| | 5 | Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L | | | | 5 | |
| | 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 | | | | 6 | |
| | 7 | Notes and loans receivable, net | | | | 7 | |
| | 8 | Inventories for sale or use | | | | 8 | |
| | 9 | Prepaid expenses and deferred charges | | | 49,635 | 9 | 37,133 |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D | 10a | 0 | | | |
| | b | Less: accumulated depreciation | 10b | 0 | 0 | 10c | 0 |
| | 11 | Investments—publicly traded securities | | | 6,842,595 | 11 | 5,309,177 |
| | 12 | Investments—other securities. See Part IV, line 11 | | | 0 | 12 | 0 |
| | 13 | Investments—program-related. See Part IV, line 11 | | | 102,154 | 13 | 92,410 |
| | 14 | Intangible assets | | | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | | 70,100 | 15 | 70,100 |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 34) | | | 8,199,733 | 16 | 6,309,174 |
| Liabilities | 17 | Accounts payable and accrued expenses | | | 64,294 | 17 | 57,015 |
| | 18 | Grants payable | | | | 18 | |
| | 19 | Deferred revenue | | | 132,844 | 19 | 159,402 |
| | 20 | Tax-exempt bond liabilities | | | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | | | | 21 | |
| | 22 | Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L | | | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | | | 24 | |
| | 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 | | | 138 | 25 | 138 |
| | 26 | Total liabilities. Add lines 17 through 25 | | | 197,276 | 26 | 216,555 |
| Net Assets or Fund Balances | Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34. | | | | | | |
| | 27 | Unrestricted net assets | | | 6,592,035 | 27 | 4,752,505 |
| | 28 | Temporarily restricted net assets | | | 1,017,898 | 28 | 947,590 |
| | 29 | Permanently restricted net assets | | | 392,524 | 29 | 392,524 |
| | Organizations that do not follow SFAS 117, check here <input type="checkbox"/> 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 | | | 8,002,457 | 33 | 6,092,619 |
| | 34 | Total liabilities and net assets/fund balances | | | 8,199,733 | 34 | 6,309,174 |

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 | 1,913,178 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 3,759,733 |
| 3 | Revenue less expenses Subtract line 2 from line 1 | 3 | -1,846,555 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | 8,002,457 |
| 5 | Other changes in net assets or fund balances (explain in Schedule O) | 5 | -63,283 |
| 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 | 6,092,619 |

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 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/> Separate basis <input checked="" type="checkbox"/> Consolidated basis <input type="checkbox"/> 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? | | No |
| 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 | | |

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
EDWARD FOUNDATION

Employer identification number
36-3723705

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.") | 1,370,563 | 961,472 | 1,726,907 | 2,181,245 | 2,091,555 | 8,331,742 |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf | | | | | | 0 |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | 0 |
| 4 Total. Add lines 1 through 3 | 1,370,563 | 961,472 | 1,726,907 | 2,181,245 | 2,091,555 | 8,331,742 |
| 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) | | | | | | 1,388,326 |
| 6 Public Support. Subtract line 5 from line 4 | | | | | | 6,943,416 |

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 | 1,370,563 | 961,472 | 1,726,907 | 2,181,245 | 2,091,555 | 8,331,742 |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | 400,496 | 395,530 | 184,826 | 166,488 | 155,036 | 1,302,376 |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on | | | | | | 0 |
| 10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets | 0 | 86,103 | 104,525 | 103,375 | 116,083 | 410,086 |
| 11 Total support (Add lines 7 through 10) | | | | | | 10,044,204 |

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 | 69 120 % |
| 15 Public Support Percentage for 2010 Schedule A, Part II, line 14 | 15 | 70 090 % |

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 |
|--|
| OTHER INCOME, SCHEDULE A, PART II, LINE 10, DESCRIPTION - FUNDRAISING EVENT REVENUE, COLUMN A - , COLUMN B - 86103, COLUMN C - 104525, COLUMN D - 103375, COLUMN E - 116083, COLUMN F - 410086,, |
| |
| |

SCHEDULE D
(Form 990)

Supplemental Financial Statements

Department of the Treasury
Internal Revenue Service

OMB No 1545-0047

2011

Open to Public Inspection

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 EDWARD FOUNDATION | Employer identification number 36-3723705 |
|---|--|

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? | |
| | <div>Yes</div> <div>No</div> | |
| 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 | |
| | <div>Yes</div> <div>No</div> | |

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

\$

0

(ii)

Assets included in Form 990, Part X

\$

70,100

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)

a

☒ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other

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 | |

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

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 | 335,485 | 341,508 | 347,476 | 366,111 |
| b | Contributions | | | | |
| c | Investment earnings or losses | 22,415 | 22,556 | 22,965 | -3,745 |
| d | Grants or scholarships | | | | |
| e | Other expenditures for facilities and programs | 1,876 | 28,579 | 28,933 | 14,890 |
| f | Administrative expenses | | | | |
| g | End of year balance | 356,024 | 335,485 | 341,508 | 347,476 |

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶ 0 %

b

Permanent endowment ▶ 100 000 %

c

Term endowment ▶ 0 %

3a

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

(i)

unrelated organizations

(ii)

related organizations

3a(i)

Yes

No

3a(ii)

Yes

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

3b

Yes

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 | | | | 0 |
| b Buildings | | | | 0 |
| c Leasehold improvements | | | | 0 |
| d Equipment | | | | 0 |
| e Other | | | | 0 |
| Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶ | | | | 0 |

| 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 | 1,913,178 |
| 2 | Total expenses (Form 990, Part IX, column (A), line 25) | 2 | 3,759,733 |
| 3 | Excess or (deficit) for the year Subtract line 2 from line 1 | 3 | -1,846,555 |
| 4 | Net unrealized gains (losses) on investments | 4 | -63,285 |
| 5 | Donated services and use of facilities | 5 | |
| 6 | Investment expenses | 6 | |
| 7 | Prior period adjustments | 7 | |
| 8 | Other (Describe in Part XIV) | 8 | 0 |
| 9 | Total adjustments (net) Add lines 4 - 8 | 9 | -63,285 |
| 10 | Excess or (deficit) for the year per financial statements Combine lines 3 and 9 | 10 | -1,909,840 |

| 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 | 2,055,082 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12 | | |
| a | Net unrealized gains on investments | 2a | -63,285 |
| b | Donated services and use of facilities | 2b | |
| c | Recoveries of prior year grants | 2c | |
| d | Other (Describe in Part XIV) | 2d | 205,189 |
| e | Add lines 2a through 2d | 2e | 141,904 |
| 3 | Subtract line 2e from line 1 | 3 | 1,913,178 |
| 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 | |
| b | Other (Describe in Part XIV) | 4b | 0 |
| c | Add lines 4a and 4b | 4c | 0 |
| 5 | Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12) | 5 | 1,913,178 |

| Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return | | | |
|--|---|----|-----------|
| 1 | Total expenses and losses per audited financial statements | 1 | 1,294,611 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25 | | |
| a | Donated services and use of facilities | 2a | 566,415 |
| b | Prior year adjustments | 2b | |
| c | Other losses | 2c | |
| d | Other (Describe in Part XIV) | 2d | 0 |
| e | Add lines 2a through 2d | 2e | 566,415 |
| 3 | Subtract line 2e from line 1 | 3 | 728,196 |
| 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 | |
| b | Other (Describe in Part XIV) | 4b | 3,031,537 |
| c | Add lines 4a and 4b | 4c | 3,031,537 |
| 5 | Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18) | 5 | 3,759,733 |

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 |
|--|--------------------------------|---|
| Collections of art - description of collections | Schedule D, Part III, Line 4 | THE FOUNDATION MAINTAINS 3 PAINTINGS, 2 BY ARTIST R W ADDISON VALUED AT \$30,100 AND ONE BY ARTIST EUGENE BOUDIN VALUED AT \$40,000. THESE ARE ON PUBLIC DISPLAY. |
| Intended uses of endowment funds | Schedule D, Part V, Line 4 | THERE ARE THREE PERMANENT ENDOWMENT FUNDS: CARDIOVASCULAR-TO BE USED FOR THE EDWARD HOSPITAL CARDIOVASCULAR PROGRAM, ANIMAL ASSISTED THERAPY-TO BE USED TO SUPPORT THE USE OF DOGS VISITING PATIENTS TO HELP RELIEVE STRESS AND IMPROVE HEALING TIMES, AND THE BOOK SCHOLARSHIP FUND - TO HELP NURSES EDUCATIONALLY BY SUPPLEMENTING THEIR FURTHER HIGHER EDUCATIONAL EXPENSES. |
| FIN 48 (ASC 740) footnote | Schedule D, Part X, Line 2 | THE CORPORATION, THE HOSPITAL, EHV, EHFC, THE FOUNDATION, AND LINDEN OAKS ARE EXEMPT FROM FEDERAL INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE ON INCOME RELATED TO THEIR EXEMPT PURPOSES. ACCORDINGLY, THERE IS NO MATERIAL PROVISION FOR INCOME TAX FOR THESE ENTITIES. |
| Other revenues in audited financial statements not in form 990 | Schedule D, Part XII, Line 2d | SPECIAL EVENTS - 205189, |
| Other expenses in form 990 not in audited financial statements | Schedule D, Part XIII, Line 4b | ASSET TRANSFER - 3031537, |

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
EDWARD FOUNDATION

Employer identification number
36-3723705

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

b

☐ Internet and e-mail solicitations

c

☐ Phone solicitations

d

☐ In-person solicitations

e

☐ Solicitation of non-government grants

f

☐ Solicitation of government grants

g

☐ Special fundraising events

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 | | | |
| | | | | | | |
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| | | | | | | |
| Total ▶ | | | | | | |

3

List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing.

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. Cat No 50083H Schedule G (Form 990 or 990-EZ) 2011

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 |
|-----------------|----|--|-----------------------------|----------------------------|----------------------------------|
| | | <u>GALA</u> (event type) | <u>GOLF</u> (event type) | <u>0</u> (total number) | (Add col (a) through col (c)) |
| Revenue | 1 | Gross receipts | 637,754 | 213,003 | 850,757 |
| | 2 | Less Charitable contributions | 550,754 | 183,918 | 734,672 |
| | 3 | Gross income (line 1 minus line 2) | 87,000 | 29,085 | 0116,085 |
| Direct Expenses | 4 | Cash prizes | 1,809 | | 1,809 |
| | 5 | Non-cash prizes | 30,029 | 1,731 | 31,760 |
| | 6 | Rent/facility costs | 0 | 4,500 | 4,500 |
| | 7 | Food and beverages | 82,246 | 32,426 | 114,672 |
| | 8 | Entertainment | 23,045 | 6,500 | 29,545 |
| | 9 | Other direct expenses | 126,003 | 13,285 | 139,288 |
| | 10 | Direct expense summary Add lines 4 through 9 in column (d) | | | (321,574) |
| | 11 | Net income summary Combine lines 3 and 10 in column (d). | | | -205,489 |

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 | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> 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 |
|------------|-----------------|-------------|

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
EDWARD FOUNDATION

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
36-3723705

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 |
|---|------------|------------------------------------|--------------------------|-----------------------------------|---|--|------------------------------------|
| (1) EDWARD HOSPITAL801 S WASHINGTON STREET NAPERVILLE IL,IL 60540 | 36-3297173 | 501(C))(3) | 2,461,055 | | | | SEE PART IV |
| (2) NAPERVILLE PSYCHIATRIC HEALTH VENTURES801 S WASHINGTON STREET NAPERVILLE,IL 60540 | 36-3965251 | 501(C)(3) | 1,002,334 | | | | SEE PART IV |
| | | | | | | | |
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| | | | | | | | |

2

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

2

3

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

0

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) SCHOLARSHIPS | 26 | 41,000 | | | |
| | | | | | |
| | | | | | |
| | | | | | |
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| | | | | | |
| | | | | | |

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 |
|--|----------------------------|--|
| Procedures for monitoring use of grant funds | Schedule I, Part I, Line 2 | WHEN AWARDING GRANTS TO INDIVIDUALS, THE EDWARD FOUNDATION HAS FORMS THAT NEED TO BE FILLED OUT BY POTENTIAL RECIPIENTS THESE FORMS INCLUDE THE REQUIREMENTS AND CRITERIA REQUIRED FOR AWARDS THE FINAL PROCESS OF NARROWING DOWN THE LIST TO THE FINAL CANDIDATES IS BASED UPON GPA AND YEARS OF SENIORITY THERE ARE TWO GRANTS THAT ARE GIVEN OUT ANNUALLY THE BOOK NURSING SCHOLARSHIP AWARDS, WHICH ARE FOR NURSES FURTHERING THEIR EDUCATION (15 AWARDS AT \$2,000/EACH) AND STUDENT VOLUNTEER AWARDS FOR EDUCATION (11 AWARDS AT \$1,000/EACH) THESE AWARDS ARE MADE DIRECTLY TO THE COLLEGES FOR EACH OF THE STUDENT'S ACCOUNTS WHEN AWARDING GRANTS TO AFFILIATED ORGANIZATION, EDWARD HOSPITAL & NAPERVILLE PSYCHIATRIC VENTURES, ALL OF THESE AWARDS MUST BE APPROVED BY THE EXECUTIVE DIRECTOR OF THE EDWARD FOUNDATION AND THE ACCOUNTING DEPARTMENT AS TO CORRECT USAGE OF THE FUNDS FOR DESIGNATED PURPOSES IN THE RESTRICTED ACCOUNTS AND APPROVAL BY THE EDWARD FOUNDATION BOARD FOR UNRESTRICTED ACCOUNTS |
| GRANTS GREATER THAN \$5,000 | SCHEDULE I, PART IV | TOTAL GRANTS TO EDWARD HOSPITAL CONSIST OF THE FOLLOWING - \$533,160 FOR THE KIDSCARE CAPITAL CAMPAIGN - \$1,000,000 FOR HYPERBARIC CHAMBER - \$500,000 FOR FIXED ASSETS - IMPROVED ACCESS TO CARE - 361,859 FOR SUPPORT - \$15,036 FOR MICROSCOPE - \$51,000 FOR ULTRASOUND TOTAL GRANTS TO NAPERVILLE PSYCHIATRIC HEALTH VENTURES CONSISTS OF THE FOLLOWING - \$2,334 FOR SUPPORT - \$1,000,000 FOR LOH ADDITION |

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
EDWARD FOUNDATION

Employer identification number

36-3723705

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 | | |
| | <div><div><input type="checkbox"/> First-class or charter travel</div><div><input type="checkbox"/> Travel for companions</div><div><input type="checkbox"/> Tax idemnification and gross-up payments</div><div><input type="checkbox"/> Discretionary spending account</div></div> <div><div><input type="checkbox"/> Housing allowance or residence for personal use</div><div><input type="checkbox"/> Payments for business use of personal residence</div><div><input checked="" type="checkbox"/> Health or social club dues or initiation fees</div><div><input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)</div></div> | | |
| 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 | 1b | Yes |
| 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? | 2 | 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 | | |
| | <div><div><input type="checkbox"/> Compensation committee</div><div><input type="checkbox"/> Independent compensation consultant</div><div><input type="checkbox"/> Form 990 of other organizations</div></div> <div><div><input checked="" type="checkbox"/> Written employment contract</div><div><input type="checkbox"/> Compensation survey or study</div><div><input type="checkbox"/> Approval by the board or compensation committee</div></div> | | |
| 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? | 4a | No |
| b | Participate in, or receive payment from, a supplemental nonqualified retirement plan? | 4b | No |
| c | Participate in, or receive payment from, an equity-based compensation arrangement? | 4c | 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? | 5a | No |
| b | Any related organization? | 5b | 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? | 6a | No |
| b | Any related organization? | 6b | 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 | 7 | 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 | 8 | No |
| 9 | If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)? | 9 | |

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) BARBARA P BYRNE MD | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 278,548 | 71,505 | 10,738 | 88,933 | 21,690 | 471,414 | 0 |
| (2) BRIAN P DAVIS | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 183,883 | 47,840 | 27,203 | 11,614 | 25,242 | 295,782 | 0 |
| (3) DENNISE VAUGHN | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 199,518 | 51,002 | 28,824 | 15,078 | 16,030 | 310,452 | 0 |
| (4) MEGHAN A MORENO | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 129,750 | 15,490 | 4,789 | 5,644 | 3,587 | 159,260 | 0 |
| (5) PAMELA M DAVIS | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 736,821 | 275,426 | 137,768 | 217,150 | 43,368 | 1,410,533 | 0 |
| (6) VINCENT E PRYOR | (i) | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | (ii) | 408,160 | 112,098 | 20,210 | 163,099 | 24,715 | 728,282 | 0 |
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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 |
|--|-----------------------------|--|
| Health or social club dues or initiation fees | Schedule J, Part I, Line 1a | ALL EHSC EMPLOYEES ARE OFFERED A MEMBERSHIP AT THE EDWARD HEALTH & FITNESS CENTER, AN AFFILIATE OF EHSC, AS A TAXABLE EMPLOYEE BENEFIT. MEMBERS OF SENIOR MANAGEMENT (THE PRESIDENT AND VICE PRESIDENTS) ARE ALSO PROVIDED THIS BENEFIT FOR THEIR SPOUSE AND CHILDREN, ALSO AS A TAXABLE BENEFIT. THE VALUE OF THIS BENEFIT IS DETERMINED BASED UPON THE FAIR MARKET VALUE OF THESE MEMBERSHIPS, WHICH IS IN TURN DETERMINED BASED UPON THE ACTUAL AMOUNT THAT THE EDWARD HEALTH & FITNESS CENTER CHARGES TO OTHER CORPORATE CUSTOMERS. |
| Arrangement used to establish the top management official's compensation | Schedule J, Part I, Line 3 | EXECUTIVE COMPENSATION, INCLUDING THE PRESIDENT AND ALL OFFICERS ("SENIOR MANAGEMENT"), IS MANAGED BY THE EDWARD HEALTH SERVICES CORPORATION EXECUTIVE COMMITTEE ("COMMITTEE"), ON BEHALF OF EHSC AND ALL OF ITS AFFILIATES, INCLUDING EDWARD FOUNDATION. ON AN ANNUAL BASIS, THE COMMITTEE REVIEWS COMPENSATION ARRANGEMENTS, INCLUDING THE COMPENSATION AWARD FOR THE EDWARD FOUNDATION PRESIDENT FOR THE COMING YEAR. THE COMMITTEE CONDUCTS THE REVIEW IN A MANNER THAT WILL QUALIFY FOR THE REBUTTABLE PRESUMPTION OF REASONABLENESS UNDER THE INTERMEDIATE SANCTION RULES OF SECTION 4958 OF THE INTERNAL REVENUE CODE. AS FOR THE EXECUTIVE DIRECTOR, THIS INDIVIDUAL IS COMPENSATED WITH A COMPETITIVE BASE SALARY, ALONG WITH AN INCENTIVE PLAN, WHICH IS REFLECTIVE OF EDWARD'S MARKET, AS DETERMINED BY A REVIEW OF MARKET COMPENSATION SURVEY DATA. AT THE TIME OF HIRE, THE SALARY DETERMINATION IS MADE BY GIVING CONSIDERATION TO EXPERIENCE PERTINENT TO THE ROLE FOR WHICH THE INDIVIDUAL IS TO BE HIRED. ALSO CONSIDERED ARE NICHE SKILLS OR EXPERIENCE THIS EXECUTIVE DIRECTOR BRINGS TO THE ORGANIZATION. SUPPLY AND DEMAND WILL ALSO PLAY A ROLE IN DETERMINING THE HIRE IN RATE OF PAY. BASED ON THESE FACTORS, EHSC HUMAN RESOURCES DEPARTMENT, WHICH SUPPORTS EHSC AND ALL OF ITS AFFILIATES, INCLUDING EDWARD FOUNDATION, WILL ASSIGN THE EXECUTIVE DIRECTOR TO AN APPROPRIATE PAY GRADE, AND A RATE OF PAY WILL BE OFFERED WITHIN THAT PAY GRADE. ON AN ANNUAL BASIS, EHSC HUMAN RESOURCES WORKS WITH AN INDEPENDENT THIRD PARTY COMPENSATION CONSULTANT TO CONDUCT A THOROUGH MARKET REVIEW OF ALL POSITIONS WHICH ARE NOT CONSIDERED SENIOR MANAGEMENT. USING A VARIETY OF SOURCES, OUR SALARY RANGES ARE COMPARED TO THE CURRENT MARKET PAY GRADE ASSIGNMENTS, AND INDIVIDUAL RATES OF PAY, MAY CHANGE BASED ON THE RESULTS OF THIS ANNUAL MARKET REVIEW. IN ADDITION, ANNUAL MERIT INCREASES MAY BE AWARDED BASED ON EDWARD'S BUDGET FOR THE YEAR. |

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
EDWARD FOUNDATION

Employer identification number
36-3723705

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 | | | | |
| 2 Art—Historical treasures | | | | |
| 3 Art—Fractional interests | | | | |
| 4 Books and publications | | | | |
| 5 Clothing and household goods | | | | |
| 6 Cars and other vehicles | | | | |
| 7 Boats and planes | | | | |
| 8 Intellectual property | | | | |
| 9 Securities—Publicly traded | X | 1 | 225,283 | SELLING COST |
| 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 | | | | |
| 25 Other ► (AUCTION & RAFFLE ITEMS) | X | 122 | 0 | MARKET VALUE |
| 26 Other ► () | | | | |
| 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

0

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?

30a

Yes

No

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?

31

Yes

No

32a

Does the organization hire or use third parties or related organizations to solicit, process, or sell non-cash contributions?

32a

No

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 |
|--|---|---|
| Explanations of reporting method for number of contributions | Schedule M, Part I | OTHER CONTRIBUTIONS SECURITIES - PUBLICLY TRADED CONTRIBUTION |
| Explanation of revenues not reported | Schedule M, Part I, Line 33 | EDWARD FOUNDATION DID NOT REPORT REVENUE FOR THE AUCTION AND RAFFLE ITEMS BECAUSE THESE ITEMS WERE RECEIVED AS CONTRIBUTIONS AND IMMEDIATELY AWARDED AS AUCTION/RAFFLE PRIZES DURING FUNDRAISING EVENTS |
| Number of contributions or items contributed | Schedule M, part I, column (b), Line other=AUCTION & RAFFLE ITEMS | CONTRIBUTIONS |
| Number of contributions or items contributed | Schedule M, part I, column (b), Line 9 | CONTRIBUTION |

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.

OMB No 1545-0047

2011

Open to Public
Inspection

| | |
|---|--|
| Name of the organization EDWARD FOUNDATION | Employer identification number 36-3723705 |
|---|--|

| Identifier | Return Reference | Explanation |
|------------------------------------|--------------------------------------|--|
| Classes of members or stockholders | Form 990, Part VI, Section A, Line 6 | EDWARD FOUNDATION'S SOLE CORPORATE MEMBER IS EDWARD HEALTH SERVICES CORPORATION, AN ILLINOIS NOT FOR PROFIT AND 501(C)(3) TAX EXEMPT CORPORATION |

| Identifier | Return Reference | Explanation |
|--|---------------------------------------|---|
| Members or stockholders electing members of governing body | Form 990, Part VI, Section A, Line 7a | EDWARD FOUNDATION'S SOLE CORPORATE MEMBER, EDWARD HEALTH SERVICES CORPORATION, MAY ELECT, REMOVE AND REPLACE MEMBERS OF THE BOARD OF DIRECTORS OF EDWARD FOUNDATION |

| Identifier | Return Reference | Explanation |
|---|---------------------------------------|---|
| Decisions requiring approval by members or stockholders | Form 990, Part VI, Section A, Line 7b | <p>THE BOARD OF DIRECTORS OF EDWARD FOUNDATION'S CORPORATE MEMBER, EDWARD HEALTH SERVICES CORPORATION ("EHSC"), HAS THE FOLLOWING EXCLUSIVE POWERS OVER EDWARD FOUNDATION ("FOUNDATION") - ELECT, REMOVE, AND REPLACE, DIRECTORS OF THE FOUNDATION - APPROVE AMENDMENTS TO THE ARTICLES OF INCORPORATION PROPOSED BY THE BOARD OF DIRECTORS OF THE FOUNDATION - APPROVE A PLAN OF DISSOLUTION OR LIQUIDATION OF THE FOUNDATION OR A PLAN OF MERGER OR CONSOLIDATION OF THE FOUNDATION WITH ANOTHER CORPORATION IN ADDITION, THE FOUNDATION BOARD OF DIRECTORS MAY NOT TAKE ANY OF THE ACTIONS LISTED BELOW, WITHOUT OBTAINING THE PRIOR APPROVAL OF EHSC - ADOPT, OR PERMIT THE ADOPTION OF, ANY ANNUAL OR LONG TERM CAPITAL OR OPERATIONAL BUDGET OF THE FOUNDATION OR OF ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION, - ADOPT, OR PERMIT THE ADOPTION OF, ANY VARIANCE FROM ANY ANNUAL OR LONG TERM CAPITAL OR OPERATIONAL BUDGET OF THE FOUNDATION OR OF ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION PREVIOUSLY APPROVED BY EHSC WHICH WOULD RESULT IN THE EXPENDITURE OF FUNDS EXCEEDING IN THE AGGREGATE DURING THE RELEVANT TERM OF ANY SUCH BUDGET THE GREATER OF TEN PERCENT (10%) OF THE TOTAL BUDGETED OPERATING EXPENSES OR SUCH DOLLAR LIMIT AS EHSC MAY ESTABLISH BY RESOLUTION AT THE TIME IT APPROVES SUCH BUDGET, - AUTHORIZE OR PERMIT THE FOUNDATION OR ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION TO ENTER INTO ANY CONTRACT WHICH IS NOT PROVIDED FOR IN AN ANNUAL OR LONG TERM CAPITAL OR OPERATIONAL BUDGET APPROVED BY EHSC WHERE THE AMOUNT INVOLVED EXCEEDS IN THE AGGREGATE ONE HUNDRED THOUSAND DOLLARS (\$100,000) OR SUCH OTHER DOLLAR LIMIT AS THE EHSC MAY ESTABLISH BY RESOLUTION AT THE TIME IT APPROVES SUCH BUDGET, - ADOPT, OR PERMIT THE ADOPTION OF, ANY NEW, OR ANY SUBSTANTIVE CHANGES TO THE STRATEGIC PLANS OF THE FOUNDATION OR OF ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION, - ADOPT, OR PERMIT THE ADOPTION OF, ANY NEW, OR ANY SUBSTANTIVE CHANGES TO THE MARKETING PLANS OF THE FOUNDATION OR OF ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION, - AUTHORIZE THE FOUNDATION OR ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION TO ENTER INTO ANY TRANSACTION PROVIDING FOR OR REQUIRING A CERTIFICATE OF NEED WHICH IS NOT PROVIDED FOR IN AN ANNUAL CAPITAL OR OPERATIONAL BUDGET APPROVED BY EHSC, - ORGANIZE OR ACQUIRE, OR AUTHORIZE OR PERMIT THE ORGANIZATION OR ACQUISITION OF, ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION, - APPROVE, OR PERMIT THE APPROVAL OF, ANY LONG TERM BORROWING OF MONEY FOR CAPITAL NEEDS BY THE FOUNDATION OR BY ANY AFFILIATE OR SUBSIDIARY OF THE FOUNDATION, AND - APPROVE, OR PERMIT THE APPROVAL OF, ANY CONTRIBUTIONS, GRANTS OR LOANS TO ENTITIES OTHER THAN EHSC</p> |

| Identifier | Return Reference | Explanation |
|--------------------------------------|--|--|
| Review of form 990 by governing body | Form 990, Part VI, Section B, Line 11b | A DRAFT OF THE FULL FORM 990 WAS PROVIDED TO THE EDWARD HEALTH SERVICES CORPORATION AUDIT COMMITTEE, AND WAS REVIEWED WITH THE ASSISTANCE OF CROWE HORWATH FOLLOWING REVIEW BY THE AUDIT COMMITTEE, AND PRIOR TO FILING, A FINAL COPY OF THE FORM 990 WAS THEN PROVIDED TO THE FULL BOARD OF TRUSTEES, AND KEY COMPONENTS OF THE FORM 990 WERE ALSO REVIEWED |

| Identifier | Return Reference | Explanation |
|-----------------------------|--|---|
| Conflict of interest policy | Form 990, Part VI, Section B, Line 12c | <p>EDWARD HEALTH SERVICES CORPORATION, ON BEHALF OF ITSELF AND ALL AFFILIATES INCLUDING EDWARD FOUNDATION, MONITORS AND ENFORCES COMPLIANCE WITH ITS CONFLICT OF INTEREST POLICY THROUGH ANNUAL REPORTING, AND ONGOING EDUCATION EACH YEAR, EHSC CONDUCTS AN ANNUAL CONFLICT OF INTEREST REVIEW THIS PROCESS INVOLVES REQUIRING ALL TRUSTEES, OFFICERS, KEY EMPLOYEES, CONTRACTED PHYSICIANS AND PHYSICIANS IN LEADERSHIP ROLES, AND MANAGEMENT LEVEL EMPLOYEES TO COMPLETE AN ELECTRONIC CONFLICT OF INTEREST QUESTIONNAIRE THE DATA ARE REPORTED BACK TO THE DIRECTOR OF COMPLIANCE AND PRIVACY, WHO ASSESSES THE REPORTED CONFLICTS TO DETERMINE WHETHER THEY REQUIRE ANY FOLLOW-UP ACTION, INCLUDING DIVESTITURE OF ANY BUSINESS INTEREST OR POSSIBLE TERMINATION OF ANY BUSINESS RELATIONSHIP THE DIRECTOR OF COMPLIANCE AND PRIVACY ENSURES THAT ALL REQUIRED INDIVIDUALS SUBMIT A COMPLETED QUESTIONNAIRE, AND IF NO REPORT IS COMPLETED, THE MATTER IS REPORTED TO THE BOARD OF TRUSTEES THE BOARD OF TRUSTEES IS ALSO PROVIDED A SUMMARY REPORT OF ALL ACTUAL OR POTENTIAL CONFLICTS OF INTEREST, SO THAT THEY ARE AWARE OF THESE RELATIONSHIPS AS THE BUSINESS OF THE BOARD IS BEING CONDUCTED IN CASES WHERE AN ACTUAL OR POTENTIAL CONFLICT IS IDENTIFIED, THE CONFLICTED INDIVIDUAL IS EDUCATED ABOUT HOW THEY SHOULD RAISE THIS ISSUE IF THEY ARE EVER IN A POSITION WHERE THEIR CONFLICT MAY BE IMPLICATED CONFLICTED INDIVIDUALS MUST RECUSE THEMSELVES FROM VOTING, BUT, AT THE DISCRETION OF THE BOARD, MAY BE PERMITTED TO PARTICIPATE IN DISCUSSION ABOUT MATTERS IN WHICH THEY HAVE AN ACTUAL OR APPARENT CONFLICT IN ADDITION TO THIS ANNUAL REPORTING, ALL INDIVIDUALS NOTED ABOVE ARE ADVISED THAT, PURSUANT TO THE CONFLICTS POLICY, THEY ARE REQUIRED TO REPORT TO THE DIRECTOR OF COMPLIANCE AND PRIVACY ANY ACTUAL OR POTENTIAL CONFLICTS OF INTEREST AS THEY MAY ARISE THROUGHOUT THE COURSE OF THE YEAR</p> |

| Identifier | Return Reference | Explanation |
|---|--|--|
| Process used to establish compensation of top management official | Form 990, Part VI, Section B, Line 15a | <p>EXECUTIVE COMPENSATION, INCLUDING THE CEO AND ALL OFFICERS ("SENIOR MANAGEMENT"), IS MANAGED BY THE EHSC EXECUTIVE COMMITTEE ("COMMITTEE"), ON BEHALF OF EHSC AND ALL OF ITS AFFILIATES, INCLUDING EDWARD FOUNDATION. ON AN ANNUAL BASIS, THE COMMITTEE REVIEWS COMPENSATION ARRANGEMENTS, INCLUDING THE COMPENSATION AWARD FOR THE EDWARD FOUNDATION PRESIDENT/CEO FOR THE COMING YEAR. THE COMMITTEE CONDUCTS THE REVIEW IN A MANNER THAT WILL QUALIFY FOR THE REBUTTABLE PRESUMPTION OF REASONABLENESS UNDER THE INTERMEDIATE SANCTION RULES OF SECTION 4958 OF THE INTERNAL REVENUE CODE. TO THAT END - THE CEO AND ALL OTHER MEMBERS OF SENIOR MANAGEMENT MAY PARTICIPATE IN THIS REVIEW PROCESS AND BE PRESENT AT MEETINGS OF THE COMMITTEE ONLY IF AND TO THE EXTENT NECESSARY TO ANSWER QUESTIONS AND PROVIDE OTHER INFORMATION THE COMMITTEE NEEDS FOR ITS ANALYSIS, ASSESSMENT AND DELIBERATIONS, AND THEY MUST OTHERWISE RECUSE THEMSELVES FROM COMMITTEE MEETINGS DURING COMMITTEE DEBATE AND VOTING ON COMPENSATION ARRANGEMENTS - THE COMMITTEE CONFIRMS PRIOR TO COMMENCEMENT OF THE ANNUAL REVIEW THAT NO OTHER MEMBER OF THE COMMITTEE HAS A CONFLICT OF INTEREST WITH REGARD TO THE COMPENSATION MATTERS ADDRESSED IN THE REVIEW. ANY MEMBER IDENTIFIED AS HAVING A CONFLICT SHALL PARTICIPATE IN THE PROCESS ONLY TO THE SAME EXTENT AS MEMBERS OF SENIOR MANAGEMENT - THE COMMITTEE CONDUCTS THE REVIEW WITH THE ASSISTANCE OF AN EXPERIENCED AND INDEPENDENT COMPENSATION FIRM, WHO SHALL SUMMARIZE ITS ANALYSIS AND FINDINGS IN WRITING TO THE EXECUTIVE COMMITTEE - THE COMMITTEE OBTAINS AND RELIES UPON CURRENT, COMPARABLE MARKET COMPENSATION DATA FOR APPROPRIATE PEER ORGANIZATIONS FOR EACH COMPENSATION COMPONENT PRIOR TO MAKING ITS DETERMINATION. RELEVANT INFORMATION WILL INCLUDE COMPENSATION LEVELS PAID BY SIMILARLY SITUATED ORGANIZATIONS, BOTH TAXABLE AND TAX-EXEMPT, FOR FUNCTIONALLY COMPARABLE POSITIONS, THE AVAILABILITY OF SIMILAR SERVICES IN THE GEOGRAPHIC AREA SERVED BY EHSC, CURRENT COMPENSATION SURVEYS COMPILED BY AN INDEPENDENT FIRM, AND ACTUAL WRITTEN OFFERS FROM SIMILAR ORGANIZATIONS COMPETING FOR THE SERVICES OF THE MEMBERS OF SENIOR MANAGEMENT - THE EXECUTIVE COMMITTEE ALSO ADEQUATELY AND PROMPTLY DOCUMENTS ITS DECISION. THE DOCUMENTATION STATES THE INTENTION TO QUALIFY FOR THE REBUTTABLE PRESUMPTION OF REASONABLENESS, THE SPECIFIC TERMS OF THE COMPENSATION ARRANGEMENT THAT WERE APPROVED, THE APPROVAL DATE, THE NAMES OF THE INDIVIDUALS PRESENT AND THOSE WHO VOTED, THE SPECIFIC COMPARABILITY DATA OBTAINED AND RELIED UPON, AND AN EXPLANATION AS TO WHY THE APPROVED AMOUNTS ARE CONSIDERED REASONABLE IF THE TERMS OF THE COMPENSATION ARRANGEMENT DIFFER FROM THE COMPARABILITY DATA. IT ALSO REFLECTS THE STEPS TAKEN BY THE COMMITTEE TO CONFIRM THE ABSENCE OF CONFLICTS ON THE PART OF ANY COMMITTEE MEMBER AND TO MEET THE FOREGOING REQUIREMENTS CONCERNING THE NATURE AND EXTENT OF PARTICIPATION OF ANY CONFLICTED COMMITTEE MEMBER OR MEMBERS OF SENIOR MANAGEMENT. IN ADDITION, THE EXECUTIVE COMMITTEE PERIODICALLY REVIEWS THE EXECUTIVE COMPENSATION PLAN, INCLUDING THE PHILOSOPHY, FOR (A) COMPLIANCE WITH APPLICABLE LAWS AND REGULATIONS, AND (B) ALIGNMENT WITH EHSC'S MISSION, CHARITABLE PURPOSES, GOALS AND STRATEGIES. BASED ON THE REVIEW, THE COMMITTEE DEVELOPS AND RECOMMENDS TO THE FULL BOARD FOR ITS APPROVAL CHANGES IN ONE OR MORE COMPONENTS OF THE PLAN OR THE PLAN PHILOSOPHY THAT THE COMMITTEE CONSIDERS NECESSARY AND APPROPRIATE RELATIVE TO ONE OR BOTH OF THESE CRITERIA. AS FOR THE EXECUTIVE DIRECTOR, THIS INDIVIDUAL IS COMPENSATED WITH A COMPETITIVE BASE SALARY, ALONG WITH AN INCENTIVE PLAN, WHICH IS REFLECTIVE OF EDWARD'S MARKET, AS DETERMINED BY A REVIEW OF MARKET COMPENSATION SURVEY DATA - AT THE TIME OF HIRE, THE SALARY DETERMINATION IS MADE BY GIVING CONSIDERATION TO EXPERIENCE PERTINENT TO THE ROLE FOR WHICH THE INDIVIDUAL IS TO BE HIRED. ALSO CONSIDERED ARE NICHE SKILLS OR EXPERIENCE THIS EXECUTIVE DIRECTOR BRINGS TO THE ORGANIZATION. SUPPLY AND DEMAND WILL ALSO PLAY A ROLE IN DETERMINING THE HIRE IN RATE OF PAY. BASED ON THESE FACTORS, EHSC HUMAN RESOURCES DEPARTMENT, WHICH SUPPORTS EHSC AND ALL OF ITS AFFILIATES, INCLUDING EDWARD FOUNDATION, WILL ASSIGN THE EXECUTIVE DIRECTOR TO AN APPROPRIATE PAY GRADE, AND A RATE OF PAY WILL BE OFFERED WITHIN THAT PAY GRADE - ON AN ANNUAL BASIS, EHSC HUMAN RESOURCES WORKS WITH AN INDEPENDENT THIRD PARTY COMPENSATION CONSULTANT TO CONDUCT A THOROUGH MARKET REVIEW OF ALL POSITIONS WHICH ARE NOT CONSIDERED SENIOR MANAGEMENT. USING A VARIETY OF SOURCES, OUR SALARY RANGES ARE COMPARED TO THE CURRENT MARKET. PAY GRADE ASSIGNMENTS, AND INDIVIDUAL RATES OF PAY, MAY CHANGE BASED ON THE RESULTS OF THIS ANNUAL MARKET REVIEW. IN ADDITION, ANNUAL MERIT INCREASES MAY BE AWARDED BASED ON EDWARD'S BUDGET FOR THE YEAR.</p> |

| Identifier | Return Reference | Explanation |
|--|--|---|
| Process used to establish compensation of other officers/key employees | Form 990, Part VI, Section B, Line 15b | PLEASE SEE THE NARRATIVE TO FORM 990, PART VI, LINE 15A |

| Identifier | Return Reference | Explanation |
|---|---------------------------------------|--|
| Governing documents, conflict of interest policy and financial statements available to the public | Form 990, Part VI, Section C, Line 19 | CURRENTLY, THE ORGANIZATION'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE UPON REQUEST IF A REQUEST IS RECEIVED FOR THIS INFORMATION, IT IS FORWARDED ON TO EITHER THE LEGAL DEPARTMENT OR THE FINANCE DEPARTMENT, AND THE MATERIALS WOULD THEN BE PROVIDED TO THE REQUESTOR |

| Identifier | Return Reference | Explanation |
|--|---------------------------|--|
| Other changes in net assets or fund balances | Form 990, Part XI, Line 5 | NET UNREALIZED GAINS (LOSSES) ON INVESTMENTS - -63283, |

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
EDWARD FOUNDATION

Employer identification number
36-3723705

| 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 |
| (1) EDWARD HOSPITAL 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3297173 | HOSPITAL | IL | 501(C)(3) | 3 | EHSC | | No |
| (2) NAPERVILLE PSYCHIATRIC VENTURES 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3965251 | HOSPITAL | IL | 501(C)(3) | 3 | EHV | | No |
| (3) EDWARD HEALTH AND FITNESS CENTER 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3555528 | HEALTH CARE | IL | 501(C)(3) | 9 | EHV | | No |
| (4) EDWARD HEALTH VENTURES 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 58-1672987 | SUPPORTING ORG | IL | 501(C)(3) | 11 - Type II | EHSC | | No |
| (5) EDWARD HEALTH SERVICES CORPORATION 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3513954 | PARENT | IL | 501(C)(3) | 11 - Type II | NA | | No |
| (6) EDWARD AMBULANCE SERVICES LLC 801 SOUTH WASHINGTON NAPERVILLE, IL 60540 45-2389060 | HEALTH CARE | IL | 501(C)(3) | 11 - Type II | EH | | 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 | |
| (1) EDWARD PHYSICIAN OFFICE CENTER 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 | HEALTH CARE | IL | N/A | | | | | | | | | |
| (2) THE CENTER FOR SURGERY LP 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 | HEALTH CARE | IL | N/A | | | | | | | | | |
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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 |
|---|-------------------------|---|-------------------------------------|--|---------------------------------|--|--------------------------------|
| (1) EDWARD MANAGEMENT CORPORATION 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3833311 | MANAGEMENT CORP | IL | EHV | C CORPORATION | | | |
| (2) NAPERVILLE HEALTH CARE ASSOC LTD 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3651180 | HEALTH CARE | IL | EH | C CORPORATION | | | |
| (3) EHSC CAYMAN SEGREGATED PORTFOLIO 1ST CARIBBEAN HSE 3RD FL 10 MAIN ST GEORGE TOWN CJ | INSURANCE | CJ | EHSC | C CORPORATION | | | |
| (4) ILLINOIS HEALTH PARTNERS LLC 801 SOUTH WASHINGTON NAPERVILLE, IL 60540 | HEALTH CARE | IL | EHSC | C CORPORATION | | | |
| | | | | | | | |
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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

Yes

Yes

Yes

No

Yes

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) | | | |

Schedule R (Form 990) 2011

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 | |
|------------|------------------|-------------|--|
|------------|------------------|-------------|--|

Software ID: 11000230
Software Version: v2011.1.0
EIN: 36-3723705
Name: EDWARD FOUNDATION

Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

| (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 501(c)(3)) | (f) Direct Controlling Entity | (g) Section 512 (b)(13) controlled organization | |
|---|-------------------------|--|----------------------------|---|----------------------------------|--|----|
| EDWARD HOSPITAL 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3297173 | HOSPITAL | IL | 501(C)(3) | 3 | EHSC | | No |
| NAPERVILLE PSYCHIATRIC VENTURES 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3965251 | HOSPITAL | IL | 501(C)(3) | 3 | EHV | | No |
| EDWARD HEALTH AND FITNESS CENTER 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3555528 | HEALTH CARE | IL | 501(C)(3) | 9 | EHV | | No |
| EDWARD HEALTH VENTURES 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 58-1672987 | SUPPORTING ORG | IL | 501(C)(3) | 11 - Type II | EHSC | | No |
| EDWARD HEALTH SERVICES CORPORATION 801 SOUTH WASHINGTON STREET NAPERVILLE, IL 60540 36-3513954 | PARENT | IL | 501(C)(3) | 11 - Type II | NA | | No |
| EDWARD AMBULANCE SERVICES LLC 801 SOUTH WASHINGTON NAPERVILLE, IL 60540 45-2389060 | HEALTH CARE | IL | 501(C)(3) | 11 - Type II | EH | | No |

Additional Data

Software ID: 11000230
Software Version: v2011.1.0
EIN: 36-3723705
Name: EDWARD FOUNDATION

Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)

| 4d. Other program services | | | |
|--|----------------|-----------|--|
| (Code |) (Expenses \$ | 3,381,492 | including grants of \$ 3,381,492) (Revenue \$) |
| OTHER ACTIVITIES RELATED TO RECEIVING DONATIONS AND DISTRIBUTING FUNDS IN ACCORDANCE WITH DONOR INTENT IN SUPPORT OF 501(C)(3) HEALTH CARE ORGANIZATIONS THAT ARE AFFILIATED WITH EDWARD HEALTH SERVICES CORPORATION | | | |