Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014 or tax year beginning JUL 1, 2014 , and ending JUN 30, 2015

Name of foundation THE SUMMERLEE FOUNDATION	A Employer identification number 75-2252355
Number and street (or P O box number if mail is not delivered to street address) 5556 CARUTH HAVEN LANE — Room/suite	B Telephone number (214) 363-9000
City or town, state or province, country, and ZIP or foreign postal code DALLAS, TX 75225	C If exemption application is pending, check here ▶ ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change	D 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation	E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶$ 69,320,708. J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	58.			
	2 Check ▶ ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	783,746.	783,746.		STATEMENT 1
	5a Gross rents	11,492.	11,492.		STATEMENT 2
	b Net rental income or (loss) 11,492.				
	6a Net gain or (loss) from sale of assets not on line 10	4,791,387.			STATEMENT 3
	b Gross sales price for all assets on line 6a 30,019,518.				
	7 Capital gain net income (from Part IV, line 2)		19,636.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	1,963,493.	1,751,970.	134,799.	STATEMENT 4
	12 Total. Add lines 1 through 11	7,550,176.	2,566,844.	134,799.	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	347,864.	12,711.	0.	335,153.
	14 Other employee salaries and wages	94,137.	7,766.	0.	86,371.
	15 Pension plans, employee benefits	537,771.	5,244.	0.	100,000.
	16a Legal fees				
	b Accounting fees STMT 5	57,817.	11,231.	0.	46,586.
	c Other professional fees STMT 6	129,990.	129,990.	0.	0.
	17 Interest				
	18 Taxes STMT 7	26,900.	63,587.	0.	0.
	19 Depreciation and depletion	54,978.	8,127.	0.	
	20 Occupancy	80,276.	4,280.	0.	75,996.
	21 Travel, conferences, and meetings	53,024.	1,373.	0.	51,651.
	22 Printing and publications				
	23 Other expenses STMT 8	329,672.	9,108.	120,344.	222,989.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,712,429.	253,417.	120,344.	918,746.
	25 Contributions, gifts, grants paid	2,316,766.			1,936,079.
	26 Total expenses and disbursements. Add lines 24 and 25	4,029,195.	253,417.	120,344.	2,854,825.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	3,520,981.			
	b Net investment income (if negative, enter -0-)		2,313,427.		
	c Adjusted net income (if negative, enter -0-)			14,455.	

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11-24-14 LHA For Paperwork Reduction Act Notice, see instructions.

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Part II	**Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets 1	Cash - non-interest-bearing		3,289.	37.	37.
2	Savings and temporary cash investments		185,654.	3,477,299.	3,477,299.
3	Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
4	Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
5	Grants receivable				
6	Receivables due from officers, directors, trustees, and other disqualified persons				
7	Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges		34,443.	29,710.	29,710.
10a	Investments - U.S. and state government obligations				
b	Investments - corporate stock STMT 9		24,330,017.	30,154,925.	30,154,925.
c	Investments - corporate bonds				
11	Investments - land, buildings, and equipment: basis ▶	973,622.			
	Less accumulated depreciation STMT 10▶	80,323.	901,426.	893,299.	893,299.
12	Investments - mortgage loans				
13	Investments - other STMT 11		33,541,154.	33,253,981.	33,253,981.
14	Land, buildings, and equipment: basis ▶	491,173.			
	Less accumulated depreciation STMT 12▶	345,905.	268,023.	145,268.	145,268.
15	Other assets (describe ▶ STATEMENT 13)		2,039,138.	526,724.	1,366,189.
16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)		61,303,144.	68,481,243.	69,320,708.
Liabilities 17	Accounts payable and accrued expenses		66,913.	52,436.	
18	Grants payable		1,266,741.	1,648,399.	
19	Deferred revenue				
20	Loans from officers, directors, trustees, and other disqualified persons				
21	Mortgages and other notes payable				
22	Other liabilities (describe ▶ STATEMENT 14)		749,021.	5,025,429.	
23	**Total liabilities** (add lines 17 through 22)		2,082,675.	6,726,264.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.**				
24	Unrestricted		59,220,469.	61,754,979.	
25	Temporarily restricted				
26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
27	Capital stock, trust principal, or current funds				
28	Paid-in or capital surplus, or land, bldg., and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds				
30	**Total net assets or fund balances**		59,220,469.	61,754,979.	
31	**Total liabilities and net assets/fund balances**		61,303,144.	68,481,243.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	59,220,469.
2	Enter amount from Part I, line 27a	2	3,520,981.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	62,741,450.
5	Decreases not included in line 2 (itemize) ▶ NET UNREALIZED LOSS ON INVESTMENTS	5	986,471.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	61,754,979.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	PUBLICLY TRADED SECURITIES	P		
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	20,083,676.		20,064,040.	19,636.
b				
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				19,636.
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	19,636.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	19,636.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2013	2,682,145.	53,454,004.	.050177
2012	2,944,418.	53,608,559.	.054924
2011	2,425,453.	53,344,667.	.045468
2010	2,334,646.	64,046,156.	.036453
2009	2,204,468.	48,349,583.	.045594

2 Total of line 1, column (d)	2	.232616
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.046523
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	60,671,366.
5 Multiply line 4 by line 3	5	2,822,614.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	23,134.
7 Add lines 5 and 6	7	2,845,748.
8 Enter qualifying distributions from Part XII, line 4	8	2,863,922.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ **(attach copy of letter if necessary-see instructions)** **b** Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b **c** All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			1	23,134.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3 Add lines 1 and 2			3	23,134.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	23,134.
6 Credits/Payments:				
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	2,449.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c			
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	2,449.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	20,685.
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11 Enter the amount of line 10 to be: **Credited to 2015 estimated tax** ▶		**Refunded** ▶	11	

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
If "Yes," attach a detailed description of the activities			
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	X	
b If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ TX			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.SUMMERLEE.ORG

14 The books are in care of ▶ JOHN CRAIN Telephone no. ▶ (214) 363-9000

Located at ▶ 5556 CARUTH HAVEN LANE, DALLAS, TX ZIP+4 ▶ 75225

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

		Yes	No
16 At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country ▶			

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

		Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		X
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ Yes ☒ No			
If "Yes," list the years ▶ _____, _____, _____, _____			
b Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.) N/A	2b		
c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ _____, _____, _____, _____			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)* N/A	3b		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b		X

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

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

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

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No

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

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A **5b**

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

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

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

If "Yes" to 6b, file Form 8870

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 15		347,864.	124,672.	0.

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LYNNE STARNES - 5556 CARUTH HAVEN LANE, DALLAS, TX 75225	DIRECTOR OF ADMINISTRATION 40.00	94,137.	34,143.	0.

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
COMERICA BANK PO BOX 75000, DETROIT, MI 48275	INVESTMENT MANAGEMENT	23,307.

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 EXPENSES ASSOCIATED WITH OPERATING THE MEDICINE MOUND RANCH, A 6,457 ACRE NATIVE AMERICAN ARCHAEOLOGICAL SITE AND INDIGENOUS WILDLIFE PRESERVE IN HARDEMAN COUNTY, TEXAS.	115,079.
2	
3 SEE SCHEDULE 1	251,412.
4	

Part IX-B **Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:				
a	Average monthly fair market value of securities			1a	26,545,413.
b	Average of monthly cash balances			1b	500,329.
c	Fair market value of all other assets			1c	34,549,553.
d	**Total** (add lines 1a, b, and c)			1d	61,595,295.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.		
2	Acquisition indebtedness applicable to line 1 assets			2	0.
3	Subtract line 2 from line 1d			3	61,595,295.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	923,929.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	60,671,366.
6	**Minimum investment return.** Enter 5% of line 5			6	3,033,568.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	3,033,568.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	23,134.		
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	10,466.		
c	Add lines 2a and 2b			2c	33,600.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	2,999,968.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	2,999,968.
6	Deduction from distributable amount (see instructions)			6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	2,999,968.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,854,825.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	9,097.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,863,922.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	23,134.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,840,788.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7					2,999,968.
2 Undistributed income, if any, as of the end of 2014					
a Enter amount for 2013 only				502,557.	
b Total for prior years: ______ , ______ , ______			0.		
3 Excess distributions carryover, if any, to 2014:					
a From 2009					
b From 2010					
c From 2011					
d From 2012					
e From 2013					
f **Total** of lines 3a through e		0.			
4 Qualifying distributions for 2014 from Part XII, line 4: ▶$ 2,863,922.					
a Applied to 2013, but not more than line 2a				502,557.	
b Applied to undistributed income of prior years (Election required - see instructions)			0.		
c Treated as distributions out of corpus (Election required - see instructions)		0.			
d Applied to 2014 distributable amount					2,361,365.
e Remaining amount distributed out of corpus		0.			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)		0.			0.
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0.			
b Prior years' undistributed income. Subtract line 4b from line 2b			0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions			0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.				0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015					638,603.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)		0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7		0.			
9 **Excess distributions carryover to 2015.** Subtract lines 7 and 8 from line 6a		0.			
10 Analysis of line 9:					
a Excess from 2010					
b Excess from 2011					
c Excess from 2012					
d Excess from 2013					
e Excess from 2014					

Part XIV **Private Operating Foundations** (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling ▶

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

	Tax year	Prior 3 years			
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

SUMMERLEE FOUNDATION - PROGRAM DIRECTOR, (214) 363-9000
5556 CARUTH HAVEN LANE, DALLAS, TX 75225

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

c Any submission deadlines:

JUNE; SEPTEMBER; JANUARY; MAY SEE WWW.SUMMERLEE.ORG FOR MORE INFORMATION

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

SEE SCHEDULE 3

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid dunng the year*				
ANIMAL PROTECTION GRANTS (SEE SCHEDULE 4)				739,600.
TEXAS HISTORY GRANTS (SEE SCHEDULE 5)				1,196,479.
Total			▶ 3a	1,936,079.
b *Approved for future payment*				
SEE SCHEDULE 6				985,000.
Total			▶ 3b	985,000.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	783,746.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property			16	11,492.	
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	19,636.	4,771,751.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a SEE STATEMENT 16		76,724.		1,751,970.	134,799.
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		76,724.		2,566,844.	4,906,550.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 7,550,118.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
11A	VARIOUS EXEMPT PURPOSE REVENUE, SUCH AS BOOK SALES AND RENTAL INCOME
	FROM SGR FOUNDATION AND GOVERNMENT SUBSIDIES FOR LAND CONSERVATION
	AT MEDICINE MOUND RANCH AND RECOVERIES OF PREVIOUS GRANTS.

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

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

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

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

Signature of officer or trustee

Date 3/31/2016

Title President

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self- employed	PTIN
CURTIS MAXFIELD	Curtis Maxfield	3/29/2016		P00445178

Firm's name ▶ WHITLEY PENN LLP

Firm's EIN ▶ 75-2393478

Firm's address ▶ 8343 DOUGLAS AVENUE, STE. 400
DALLAS, TX 75225

Phone no. (214)393-9300

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
COMERICA INVESTMENTS	783,746.	0.	783,746.	783,746.	0.
TO PART I, LINE 4	783,746.	0.	783,746.	783,746.	0.

FORM 990-PF RENTAL INCOME STATEMENT 2

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
LEASE INCOME - SARAHVILLE	1	11,492.
TOTAL TO FORM 990-PF, PART I, LINE 5A		11,492.

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 3

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED		

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
20,083,676.	20,064,040.	0.	0.	19,636.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
SALE OF MEDICINE MOUND	PURCHASED	VARIOUS	04/21/15

(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
9,935,842.	1,128,245.	4,035,846.	0.	4,771,751.

NET GAIN OR LOSS FROM SALE OF ASSETS	4,791,387.
CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	4,791,387.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
OIL AND GAS ROYALTIES	489,390.	489,390.	0.
OTHER EXEMPT REVENUE	14,455.	0.	14,455.
PASSTHROUGH FROM PARTNERSHIPS	76,724.	0.	0.
PASSTHROUGH FROM PARTNERSHIPS ALLOCATED TO NET INVESTMENT INCOME (NON-UBI)	1,262,580.	1,262,580.	0.
MEDICINE MOUND RANCH	120,344.	0.	120,344.
TOTAL TO FORM 990-PF, PART I, LINE 11	1,963,493.	1,751,970.	134,799.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING/AUDITING FEES	57,817.	11,231.	0.	46,586.
TO FORM 990-PF, PG 1, LN 16B	57,817.	11,231.	0.	46,586.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	102,255.	102,255.	0.	0.
OIL AND GAS CONSULTING FEES	27,735.	27,735.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	129,990.	129,990.	0.	0.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	<36,687.>	0.	0.	0.
OIL AND GAS SEVERANCE TAXES	35,190.	35,190.	0.	0.
PROPERTY TAXES	28,397.	28,397.	0.	0.
TO FORM 990-PF, PG 1, LN 18	26,900.	63,587.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INSURANCE	33,966.	0.	0.	33,966.
MEMBERSHIP DUES	13,279.	0.	0.	13,279.
MEDICINE MOUND RANCH	203,615.	0.	120,344.	99,050.
GENERAL AND ADMINISTRATIVE	70,326.	622.	0.	76,694.
SARAHVILLE/FT. MILAM	8,486.	8,486.	0.	0.
TO FORM 990-PF, PG 1, LN 23	329,672.	9,108.	120,344.	222,989.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
WENTWORTH INTERNATIONAL GROWTH ACCOUNT	0.	0.
EVERIS ACCOUNT	0.	0.
COMERICA CASH	30,154,925.	30,154,925.
TOTAL TO FORM 990-PF, PART II, LINE 10B	30,154,925.	30,154,925.

FORM 990-PF DEPRECIATION OF ASSETS HELD FOR INVESTMENT STATEMENT 10

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
HOUSE AND GARAGE - SARAHVILLE	100,000.	21,901.	78,099.
BARN AND WELL HOUSES - SARAHVILLE	20,500.	9,982.	10,518.
LAND - SARAHVILLE	772,149.	0.	772,149.
FURNITURE AND EQUIPMENT - SARAHVILLE	5,802.	4,936.	866.
LHI - SARAHVILLE	75,171.	43,504.	31,667.
TOTAL TO FM 990-PF, PART II, LN 11	973,622.	80,323.	893,299.

FORM 990-PF OTHER INVESTMENTS STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OIL AND GAS ROYALTY INTERESTS	FMV	3,234,639.	3,234,639.
RCH ENERGY PARTNERSHIP	FMV	210,625.	210,625.
GT OFFSHORE PARTNERSHIP	FMV	3,459,994.	3,459,994.
GT REAL PROPERTY PARTNERSHIP	FMV	1,054,021.	1,054,021.
COMMONFUND PARTNERSHIP	FMV	1,068,524.	1,068,524.
RCH ENERGY SSI PARTNERSHIP	FMV	3,171.	3,171.
ELLIOTT INTERNATIONAL PARTNERSHIP	FMV	4,022,426.	4,022,426.
THACKERAY PARTNERS REALTY FUND PARTNERSHIP	FMV	1,428,799.	1,428,799.
WCP REAL ESTATE FUND PARTNERSHIP	FMV	2,174,092.	2,174,092.
AMBERBROOK VI	FMV	3,009,723.	3,009,723.
VONTOBEL	FMV	1,391,597.	1,391,597.
COLCHESTER	FMV	4,472,321.	4,472,321.
FIR TREE	FMV	3,157,925.	3,157,925.
SOMERSET	FMV	1,398,557.	1,398,557.
DAVIDSON KEMPNER	FMV	3,119,842.	3,119,842.
MERIT ENERGY	FMV	47,725.	47,725.
TOTAL TO FORM 990-PF, PART II, LINE 13		33,253,981.	33,253,981.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 12

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
AUTOMOBILES	128,978.	107,600.	21,378.
FURNITURE AND EQUIPMENT - ADMIN	19,789.	19,338.	451.
FURNITURE AND EQUIPMENT - ADMIN	51,237.	43,901.	7,336.
FURNITURE AND EQUIPMENT - ANIMALS	4,763.	4,763.	0.
FURNITURE AND EQUIPMENT - ANIMALS	12,904.	12,652.	252.
FURNITURE AND EQUIPMENT - ANIMALS	36,008.	36,008.	0.
FURNITURE AND EQUIPMENT - HISTORY	3,137.	3,137.	0.
FURNITURE AND EQUIPMENT - HISTORY	11,199.	10,992.	207.
FURNITURE AND EQUIPMENT - HISTORY	28,842.	28,799.	43.
FURNITURE AND EQUIPMENT - MMR	9,112.	9,112.	0.
LEASEHOLD IMPROVEMENTS	123,103.	15,622.	107,481.

FURNITURE & EQUIPMENT - ADMIN - WIRE SHELVES	1,761.	21.	1,740.
FURNITURE & EQUIPMENT - HISTORY - IPAD	914.	76.	838.
FURNITURE AND EQUIPMENT - MMR	59,408.	53,885.	5,523.
TOTAL TO FM 990-PF, PART II, LN 14	491,155.	345,906.	145,249.

FORM 990-PF OTHER ASSETS STATEMENT 13

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MEDICINE MOUND RANCH	1,048,743.	1,500.	1,500.
ART COLLECTION	199,610.	192,110.	1,031,075.
ARCHIVES	232,452.	233,099.	233,099.
SECURITY DEPOSITS	<1,000.>	<500.>	0.
ACCRUED INVESTMENT INCOME	73,807.	100,515.	100,515.
FEDERAL EXCISE TAX RECEIVABLE	2,631.	0.	0.
DISTRIBUTION RECEIVABLE	482,895.	0.	0.
TO FORM 990-PF, PART II, LINE 15	2,039,138.	526,724.	1,366,189.

FORM 990-PF OTHER LIABILITIES STATEMENT 14

DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFINED BENEFIT PENSION OBLIGATION	513,441.	824,145.
DEFERRED FEDERAL EXCISE TAXES	235,580.	124,746.
LIABILITIES ASSOCIATED WITH SALE OF OTHER EXEMPT PURPOSE ASSETS	0.	4,010,522.
FEDERAL EXCISE TAX PAYABLE	0.	66,016.
TOTAL TO FORM 990-PF, PART II, LINE 22	749,021.	5,025,429.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 15

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JOHN CRAIN 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR/PRESIDENT 40.00	211,849.	52,695.	0.
MELANIE ANDERSON 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR/VICE PRESIDENT 40.00	136,015.	71,977.	0.
DAVID JACKSON 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR/SECRETARY 30.00	0.	0.	0.
MARTHA BENSON 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR/TREASURER 5.00	0.	0.	0.
RON TYLER 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR 5.00	0.	0.	0.
NIKKI DESHAZO 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR 5.00	0.	0.	0.
MICHAEL COLLINS 5556 CARUTH HAVEN LANE DALLAS, TX 75225	DIRECTOR 5.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		347,864.	124,672.	0.

FORM 990-PF OTHER REVENUE STATEMENT 16

DESCRIPTION	BUS CODE	UNRELATED BUSINESS INC	EXCL CODE	EXCLUDED AMOUNT	RELATED OR EXEMPT FUNCTION INCOME
OIL AND GAS ROYALTIES			15	489,390.	
OTHER EXEMPT REVENUE					14,455.
PASSTHROUGH FROM PARTNERSHIPS	523000	76,724.	14		0.
PASSTHROUGH FROM PARTNERSHIPS ALLOCATED TO NET INVESTMENT INCOME	523000		14	1,262,580.	0.
MEDICINE MOUND RANCH					120,344.
TOTAL TO FORM 990-PF, PG 12, LN 11		76,724.		1,751,970.	134,799.

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Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
	LAND, BUILDINGS, AND EQUIPMENT											
	TRANSPORTATION EQUIPMENT											
1	AUTOMOBILES	VARIES	SL	5.00	16	128,978.			128,978.	93,842.		13,758.
	* 990-PF PG 1 TOTAL TRANSPORTATION EQU					128,978.		0.	128,978.	93,842.	0.	13,758.
	OTHER											
2	FURNITURE AND EQUIPMENT - ADMIN	VARIES	SL	5.00	16	19,789.			19,789.	18,418.		920.
3	FURNITURE AND EQUIPMENT - ADMIN	VARIES	SL	7.00	16	51,237.			51,237.	39,345.		4,556.
5	FURNITURE AND EQUIPMENT - ANIMALS	VARIES	SL	3.00	16	4,763.			4,763.	4,763.		0.
6	FURNITURE AND EQUIPMENT - ANIMALS	VARIES	SL	5.00	16	12,904.			12,904.	11,396.		1,256.
7	FURNITURE AND EQUIPMENT - ANIMALS	VARIES	SL	7.00	16	36,008.			36,008.	36,008.		0.
8	FURNITURE AND EQUIPMENT - HISTORY	VARIES	SL	3.00	16	3,137.			3,137.	3,137.		0.
9	FURNITURE AND EQUIPMENT - HISTORY	VARIES	SL	5.00	16	11,199.			11,199.	9,904.		1,088.
10	FURNITURE AND EQUIPMENT - HISTORY	VARIES	SL	7.00	16	28,842.			28,842.	28,649.		150.
11	FURNITURE AND EQUIPMENT - MMR	VARIES	SL	3.00	16	9,112.			9,112.	9,112.		0.
12	(D)FURNITURE AND EQUIPMENT - MMR	VARIES	SL	7.00	16	122,014.			122,014.	55,763.		12,919.
13	(D)FURNITURE AND EQUIPMENT - MMR	VARIES	SL	15.00	16	21,580.			21,580.	8,334.		1,093.
14	(D)FURNITURE AND EQUIPMENT - MMR	VARIES	SL	39.00	16	16,684.			16,684.	2,407.		357.
15	(D)FURNITURE AND EQUIPMENT - MMR	VARIES	SL	20.00	16	560.			560.	133.		27.

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(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

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Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
17	LIVESTOCK	VARIES	SL	5.00	16	21,160.			21,160.	18,660.		1,000.
23	LEASEHOLD IMPROVEMENTS	062810	SL	39.00	16	123,103.			123,103.	12,466.		3,156.
100	FURNITURE & EQUIPMENT - ADMIN -	052715	SL	7.00	16	1,761.			1,761.			21.
101	FURNITURE & EQUIPMENT - HISTORY	012715	SL	5.00	16	914.			914.			76.
102	(D)FURNITURE & EQUIPMENT - MMR - L	012715	SL	7.00	16	5,834.			5,834.			208.
113	FURNITURE AND EQUIPMENT - MMR	VARIES	SL	7.00	16	59,408.			59,408.	47,619.		6,266.
	* 990-PF PG 1 TOTAL OTHER					550,009.		0.	550,009.	306,114.	0.	33,093.
	* 990-PF PG 1 TOTAL - LAND, BUILDINGS, SARAHVILLE LAND, BUILDINGS AND EQUIP					678,987.		0.	678,987.	399,956.	0.	46,851.
	OTHER											
18	HOUSE AND GARAGE - SARAHVILLE	122006	SL	39.00	16	100,000.			100,000.	19,337.		2,564.
19	BARN AND WELL HOUSES - SARAHVILLE	122006	SL	20.00	16	20,500.			20,500.	9,067.		915.
20	LAND - SARAHVILLE	122006	L			772,149.			772,149.			0.
21	FURNITURE AND EQUIPMENT - SARAHVI	122006	SL	7.00	16	5,802.			5,802.	4,779.		157.
22	LHI - SARAHVILLE	VARIES	SL	15.00	16	75,171.			75,171.	39,013.		4,491.
	* 990-PF PG 1 TOTAL OTHER					973,622.		0.	973,622.	72,196.	0.	8,127.
	* 990-PF PG 1 TOTAL - SARAHVILLE LAND,					973,622.		0.	973,622.	72,196.	0.	8,127.
	* GRAND TOTAL 990-PF PG 1 DEPR					1652609.		0.	1652609.	472,152.	0.	54,978.

428102
05-01-14

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
List of Schedules - Form 990-PF
For the Year Ended June 30, 2015

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015

Schedule 1 Part IX-A, Line 3

Direct Charitable Activities

From inception, the Summerlee Foundation has convened the leading authorities within its program spheres to assist in strategic planning for both the Foundation and the profession. The Foundation has relied on the direct charitable activity ("DCA") as a requisite element in its charitable endeavors. Among the generally accepted DCA categories, the Foundation has convened educational conferences not limited to its own board and staff, has provided technical assistance/training to grantees and other charitable organizations, has supported the service of Foundation staff on advisory boards and public commissions, and has published and disseminated reports on research findings and held conferences of general interest to the public.

Animal Protection Program

The Summerlee Foundation Program Director for Animal Protection participates in Direct Charitable Activities through a process of collaborating, convening, connecting, and counseling. These activities serve to foster and advance animal welfare and animal philanthropy.

The Program Director for the Animal Protection Program continued to work with other animal grantmaking individuals and institutions with advice, sharing of knowledge and collaboration strategies.

The Program Director worked strategically with the Borderlands Research Institute on a Mountain Lion Research study and protection initiative and also began a research project called Road Map to the Next Decade, a succession plan whereby critical funding areas will be identified for the future for animal protection.

The Program Director chaired the Animal Grantmakers Program Committee, advised and assisted with the annual meeting, and moderated a panel presentation at the annual conference. The Program Director continues to assist the AG with its Texas non-profit status, filings and record keeping, and serves as the liaison/coordinator for the Animal Grantmaking Database.

The Texas History Program

The Texas History program of the Summerlee Foundation offers outreach support to the Texas History community through a wide variety of professional activities ranging from archaeology to preservation to publications.

In addition to overseeing an extensive research library focusing on Texas and Southern history, the program officer is charged with providing technical assistance to a broad group of preservation and history organizations through telephonic and email conversations as well as onsite investigations. The Foundation also sponsors periodic workshops and seminars to boards and staffs of historical organizations, as well as other interested funders. The program officer is a frequent speaker at local, state, and national professional conferences, touting the benefits of better governance, better planning, and the need for financial sustainability with history organizations.

By serving as a gubernatorial appointee to the Texas Historical Commission, the Foundation's President is on the frontline in tackling major issues confronting the State of Texas in both preservation and history. In his capacity as a Commissioner of the THC, he chairs the prestigious Antiquities Advisory Board and leads efforts to designate State archaeological and architectural landmarks.

This past year, the Foundation, in conjunction with Dallas Heritage Village, launched the Summerlee Commission II. The purpose of this second Commission is to investigate governance and sustainability of historical organizations, as the Foundation is concerned about the proliferation of history organizations in the past thirty years, many of which operate on a tenuous financial basis.

The Commission held a number of information-gathering forums around the state, and has published a report that it distributes through the Summerlee Foundation website. The Texas Association of Museums and the American Association for State and Local History is also posting the report on their websites.

The Commission's report outlines the inherent difficulties that most history organizations face and offers success templates, including models for mergers, collaborations, and consolidations that struggling organizations might consider. One of the goals of the Foundation is that this report will assist countless history organizations, city councils, county commissions, park boards, and other governmental agencies that are often asked to make decisions about the future of historical properties.

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015
Schedule 2 - Schedule of Investments

	Book Value	Fair Market Value
CORPORATE STOCK		
Summarized by Investment Manager:		
Comerica Account	$ 30,154,925	$ 30,154,925
Total Investments in Corporate Stock - Part II, Line 10b	$ 30,154,925	$ 30,154,925

Note: Schedule of individual securities owned is too voluminous to include in the return, but it is available for examination at the Summerlee Foundation's office.

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015

Schedule 3 Part XV, Line 2d

Award Restrictions and Limitations

The Foundation makes grants for two specific purposes: (1) to alleviate fear, pain and suffering of animals and to promote animal protection and the prevention of cruelty to animals, and (2) to research, promote and document all facets of Texas History.

The Animal Protection program currently has funding priorities which will take precedence over any proposals not within these priority issues. In our companion animal program, the Foundation focuses on cats only in the United States and dogs in developing countries. Sterilization is an essential part of support as well as community animals and Trap, Vaccinate, Neuter, and Return programs. Special emphasis is given to those communities with the least resources and the greatest challenges of culture, education, economy, and geography.

Our marine program is focusing on the suffering of captive marine mammals and the cruel and devastating impacts of the captive trade industry on dolphins and orcas. Our terrestrial wildlife program prioritizes the protection of mountain lions, coyotes, and bobcats by funding research, education, and advocacy.

The Texas History division of the Foundation funds historical programs in public and private schools, colleges and universities, museums, libraries, archives, public television, and historical, preservation, and archaeological organizations. To be eligible for grant support, Texas history must be the primary focus of the grant proposal. Proposals focusing upon primary research will be given priority over other applications.

In the preservation arena, grant support is restricted to historic structures listed on the National Register of Historic Places – the official list of cultural resources worthy of preservation. The list includes districts, sites, buildings, structures, and objects that are significant in American history, architecture, engineering, and culture.

The program does not support the restoration of County Courthouses.

The Texas History division does not fund monuments and memorials. The program does fund Texas history programs outside Texas.

For more information go to www.summerlee.org.

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015
Schedule 4 - Animals Grants Paid During the Year

Organization Name	Organization Address	Status	Project Title	Paid Amount
Animal Birth Control Clinic Inc.	3238 Clay Avenue Waco, TX 76711	Public Charity	Support for TNR of 1,200 feral and outdoor cats of low-income families in McLennan, Falls, and Limestone, Texas counties	$10,000
Animal Fund	336 Bon Air Center Suite 155 Greenbrae, CA 94904	Public Charity	Support for a one hour film titled By All Rights, suggesting through powerful video clips and interviews that the time has come to move forward the concept of basic rights for non-human animals, using cetaceans (dolphins and whales) as the catalyst	$10,000
Animal Watch	2525 Arapahoe #E4-705 Boulder, CO 80302	Public Charity	Support for raising awareness, interest and use of the Animal Help Now tool in animal emergencies	$12,000
Ark-Valley Humane Society Inc	701 Gregg Drive P O Box 1335 Buena Vista, CO 81211	Public Charity	Support for the care and well-being of outdoor cats in Chaffee County, Colorado	$3,625
Belize Wildlife and Referral Clinic Wildlife Institute/ CO Justin Ford	105 Forest Ridge Lane Boerne, TX 78006	Non-profit	Support for construction of a flight cage for the purpose of soft-release of fledgling scarlet macaws	$4,200
Belize Wildlife and Referral Clinic Wildlife Institute/ CO Justin Ford	105 Forest Ridge Lane Boerne, TX 78006	Non-profit	Support for 24 months of medical care costs and emergency response to address imperiled wildlife nationwide	$10,000
Canadian Federation of Humane Societies	30 Concourse Gate Suite 102 Ottawa, ON K2E 7V Canada	Canadian Charity	Continued support for the Capacity for Care concept in Canada which increases cat adoptions, decreases euthanasia rates and increases the number of healthy community cats who will be sterilized and returned to managed colonies	$25,000
Chimpanzee Retirement Sanctuary Northwest	P O Box 952 Cle Elum, WA 98922	Public Charity	Ongoing general operating support for chimpanzee care and advocacy	$10,000
Community Cats Coalition, Inc	5 Windswept Drive Berlin, MD 21811	Public Charity	Support for the care and well-being of outdoor cats abandoned by summer residents on Maryland's Eastern shore	$5,000
Compassion in World Farming	River Court Mill Lane Godalming, Surrey GU 7 1EZ England	Registered Charity	Support for the Better Chicken Initiative, raising public awareness of the inherent suffering in the intensive US chicken industry with the aim of leveraging commitments from food companies to improve their chicken welfare	$10,000
Earth Island Institute/Project Coyote	P O Box 5007 Larkspur, CA 94977	Public Charity	Support for a Coyote Friendly Communities program, building on the highly successful Coexisting with Coyotes Campaigns	$17,000
Earth Island Institute/ WildFutures	353 Wallace Way NE, Suite 12 Bainbridge Island, WA 98110	Public Charity	Support for 3 key projects for advancing Cougar conservation and providing services to wildlife organizations and activist	$30,000
Elephant Aid International	P O Box 106 Hohenwald, TN 38462	Public Charity	Support for "Chain Free Means Pain Free" initiative for working elephants in Asia	$21,000
Evelyn Alexander Wildlife Rescue Center at the Hamptons, Inc	228 W Montauk Highway Hampton Bays, NY 11946	Public Charity	Support for outdoor pool for recuperating pelagic birds	$5,500

Four Paws International Inc	6 Beacon Street Suite 1110 Boston, MA 02108-3813	Public Charity	Support for post production expenses of a documentary film, entitled Blood Lions, about the breeding of captive lions for the canned hunting industry	$8,000
Friends of Arlington Animal Services	P O Box 14531 Arlington, TX 76094	Public Charity	Support for Feral Cat Headquarters in central Arlington which will further the work of TNR volunteers and feral caregivers by providing affordable sterilizations, pre and post operative care, education, equipment and food	$5,000
Friends of Mexican Animal Welfare	23825 15th Avenue Unit 327 Bothell, WA 98021-8842	Public Charity	Support for a collaborative among Mexican veterinarians engaged in spay/neuter to facilitate the exchange of information, ideas, and knowledge in order to improve the welfare of companion animals in Mexico	$6,000
Friends of the Sea Lion Inc	20612 Laguna Canyon Road Laguna Beach, CA 92651	Public Charity	Support for the Animal Care Program (food, medication medical tests, supplies) to treat hundreds of marine mammals in need each year	$7,500
Friends of the Sea Otter	P O Box 959 Moss Landing, CA 95039	Public Charity	Support for an amicus brief in support of the National Marine Fisheries Services' decision to deny the Georgia Aquarium a permit to import 18 Beluga Whales from Russia	$5,000
Grand Valley Pets	39 South Broadway Grand Junction, CO 81507	Public Charity	support for cat sterilization in managed free-roaming colonies in western Colorado	$5,000
Harmony Fund Inc	10 Pikes Hill Rd Sterling, MA 01564	Public Charity	General operating support for Turgwe Hippo Trust	$7,500
Humane Research Council	P O Box 6476 Olympia, WA 98507	Public Charity	Two year support for Animal Tracker	$2,300
Humane Society of the United States	700 Professional Drive MD20879 Gaithersburg, MD 20879	Public Charity	Support for two keystone projects aimed at expanding visibility and catalyzing information sharing in the field of animal sentience The Journal of Animal Sentience and the Chimpanzee Snare Deactivation Training Project	$25,000
Humane Society of the United States	700 Professional Drive MD20879 Gaithersburg, MD 20879	Public Charity	Continued two year support for the Annie Lee Roberts Emergency Animal Rescue Fund	$25,000
JJs Helping Paws Inc	1501 Main Street #3 Canon City, CO 81215	Public Charity	TNR and vaccinate 100 community outdoor cats in Fremont County/Canon City Colorado	$5,000
Kerulos Center	PO Box 1446 Jacksonville, OR 97530	Public Charity	support for a scientific text that describes the rationale for and concepts of carnivore psychology in conservation	$12,000
Linn County Animal Rescue	P O Box 2669 Lebanon, OR 97355	Public Charity	Support for a horse safe fence for the purpose of having a self-sustaining hay field	$7,000
Mt Lassen Animal Group	P O Box 643 Shingletown, CA 96088	Public Charity	Support for targeted spay neuter of a feral cat colony in northern California	$5,000
Ocean Alliance, Inc	32 Horton Street Gloucester, MA 01930	Public Charity	Support for a robotics research laboratory to develop the next generation of robotics benign research tools for whale and ocean pollution research and to support research on Right Whales in the Gulf of Mexico	$7,500
Operation Catnip of Gainesville Inc	P O Box 141023 Gainesville, FL 32614	Public Charity	Support for veterinary students to sterilize 250 homeless and community cats	$10,000
Orion Society	187 Main Street Great Barrington, MA 01230	Public Charity	Support for feature article on whales written by biologist and science writer, Eric Wagner	$3,800
Osage Raptor Rehab	20866 Twin Hills Drive Warsaw, MO 65355	Public Charity	support for the construction of an Eagle Flight Pen	$8,000

Panthera Corporation	8 West 40th Street 18th Floor New York, NY 10018	Public Charity	Two year support for Cougar Conservation Addressing Key Issues from North to South	$89,000
Primarily Primates, Inc	26099 Dull Knife Trail San Antonio, TX 78255	Public Charity	Support for interior enrichment items for new housing for capuchin monkeys	$6,250
Raccoon River Bend	5025 West Kane Lake Road Two Harbors, MN 55616	Public Charity	support for the finish of the new nursery building	$725
Red Rose Inspiration for Animals, Inc	P O Box 74 Sedona, AZ 86339	Public Charity	Support for targeted TNR in rural Camp Verde, Arizona	$3,500
Save the Chimps, Inc	P O Box 12220 Fort Pierce, FL 34979	Public Charity	Support for resident chimpanzees medical care, all of whom were rescued from research laboratories, entertainment and the pet trade	$15,000
Sky Island Alliance	406 South 14th Avenue Tucson, AZ 85701	Public Charity	Three year support for Protecting Undervalued Carnivores in the Sky Island Region	$40,000
Soi Dog Foundation	2010 15th Street San Francisco, CA 94114	Public Charity	Support for campaign to eradicate illegal dog meat trade in Thailand	$10,000
South Plains Wildlife Rehabilitation Center	3308 95th Street Lubbock, TX 79423	Public Charity	Support for care and nurture of native wildlife at the South Plains Wildlife Rehabilitation Center	$10,000
Southern Plains Land Trust Incorporated	6439E Maplewood Avenue Centennial, CO 80111	Public Charity	Support for continuation of Camera Trap Project on the Shortgrass Prairie of the Southern Great Plains	$12,500
SPANA - Society for the Protection of Animals Abroad	14 John Street London, Greater London WC1N 2EB (UK) England	Registered Charity in England	Support for the distribution of "the Manual of Equine Practice," to all graduating veterinary students in the countries of Morocco, Tunisia, Senegal, and Mali	$5,000
Spay Neuter Network	P O Box 515 Kaufman, TX 75142	Public Charity	Support for the sterilization of 500 outdoor cats in the Dallas/Fort Worth Metroplex to cover the $20 surgery fee for low-income or multiple outdoor cat providers who otherwise could not afford the surgeries	$25,000
St Joseph's Indian School	Chamberlain, SD 57326	Church	Support for the maintenance of the student dormitory	$15,000
Sul Ross State University Borderlands Research Institute for Natural Resource Management	Box C-21 Alpine, TX 79832	State Educational Institution	Support to gather information obtained from a landscape study to help develop a science-based conservation/management plan for the mountain lion in Texas	$100,000
Tiger Sanctuaries Inc	250 West 12th Street New York, NY 10014	Public Charity	support for improving the lives and welfare of captive tigers in the United States	$10,000
Trumpeter Swan Society	12615 County Road 9 Suite 100 Plymouth, MN 55441	Public Charity	Support for a capacity building grant to reassess organization's strengths, mission, strategies, and goals going forward as the only organization in North America that is dedicated to the conservation and restoration of Trumpeter Swans	$10,000

Wild Felid Research & Management Association	PO Box 3335 Montrose, CO 81402	Public Charity	Funding support to help further important research on wild felids for well-deserving, under funded projects in Latin America	$25,000
WildEarth Guardians	516 Alto Street Santa Fe, NM 87501	Public Charity	Support for three carnivore protection campaigns Cougar Protection, Ending the War on Wildlife and TrapFree New Mexico	$30,000
Wolf Hollow Wildlife Rehabilitation Center	P O Box 391 Friday Harbor, WA 98250	Public Charity	Support for an indoor intensive care enclosure for rehabilitating wildlife	$2,200
Wyoming Untrapped	P O Box 9004 Jackson, WY 83002	Public Charity	Support for Trails and Traps, an educational campaign to highlight Wyoming's current trapping practices and its impact on wildlife, humans and their pets	$2,500
				$739,600

THE SUMMERLEE FOUNDATION
EIN 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015
Schedule 5 - History Grants Paid During the Year

Organization Name	Organization Address	Status	Project Title	Paid Amount
Documentary Arts, Inc.	P O Box 140244 Dallas, TX 75214	Public Charity	Support for major research and writing project entitled the "Man from Quanah" pertaining to Quanah, Texas and Hardeman County Author is a descendant of former resident who has become a student of the Parker, Wilson, and Koch families	$6,500
Encore Park Dallas	1835 Young Street Dallas TX 75201	Public Charity	Support for the renovation of the historic 508 Park Building into a Museum of Street Culture with permanent exhibits on 1930's Dallas along with temporary exhibits on historical and contemporary issues	$7,500
Fort Chadbourne Foundation	651 Fort Chadbourne Road Bronte, TX 76933	Public Charity	Support for interactive digital kiosks at the 12,500 sf Visitors Center/Museum 32 inch ADA compliant touch screens would be placed in three locations within the museum It is envisioned that reality trackers will be used on the grounds	$15,000
Friends of the Texas Historical Commission	P O Box 13497 Austin, TX 78711	Public Charity	Support to provide honorariums to four Texas historians who are experts on the life and legacy of Stephen F Austin and San Felipe de Austin The work of the scholars will be used in the development of a new visitor's center at San Felipe	$7,500
Frontiers of Flight Museum	6911 Lemon Avenue Dallas, TX 75209	Public Charity	Support to establish an archives program to professionally store and organize 34,000 artifacts on North Texas Aviation and aerospace history These collections are currently inaccessible to researchers and historians	$5,000
George W Bush Foundation	P O Box 600610 Dallas, TX 75360	Public Charity	Support to offer an interactive guide to the new George W Bush Presidential Center The guide will be offered at no charge to visitors It will be available in two formats a mobile application and a handheld device	$50,000
Heritage Society at Sam Houston Park	1100 Bagby Street Houston, TX 77002	Public Charity	Support to publish a book on the preservation of six outdoor heritage museums in Texas Texas A&M has agreed to publish the work The editor will be Dr Evelyn Montgomery, Director of Collections, at Dallas Heritage Village	$7,500
Historic Jefferson Foundation	P O Box 688 Jefferson, TX 75657-0688	Public Charity	Support to preserve the Jefferson Ordnance Magazine, the only remaining example of a Civil War era powder magazine in Texas The magazine is located on the east bank of Big Cypress Bayou near Jefferson	$7,500
Houston Academy of Medicine Texas Medical Center Library	1133 John Freeman Boulevard Houston, TX 77030	Public Charity	Support for archival preservation of the Hermann Hospital and Hermann Estate historic records The collection covers the years 1900 to 2004 Materials include ledgers, memos, photographs, deeds, 35mm slides, and emphemera.	$20,000
Houston History Association	P O Box 25086 Houston, TX 77265	Public Charity	Support for 2014 Conference, "Houston Born on the Bayou, Built on the Port "	$3,500
Journal of Texas Archeology and History org	5114 Balcones Woods Drive Suite 307 Austin, TX 78759	Public Charity	Support for a symposium in conjunction with the October meeting of the Texas Archeological Society in 2015 The Houston Archeological Society, the Fort Bend Historical Society, and Coastal Bend Archeological Society are co-sponsors	$4,000
Lee College	P O Box 818 Baytown, TX 77522	Education Institution	Funds to complete a video series consisting of seven to nine minute segments on this history of Harris, Galveston, Chambers, and Liberty counties The program features historian John Britt and videographer Christopher Coats	$1,800

Media Projects, Inc.	5215 Homer Street Dallas, TX 75206-6623	Public Charity	Support to complete the major production of a documentary film on the transformation of Henderson Avenue from the 1920's to the present To date, 60 hours of filming has taken place	$12,500
Museum of Fine Arts, Houston	P O Box 6826 Houston, TX 77265-6826	Public Charity	Support for the biennial David B Warren Symposium To be presented in October 2015, the symposium will provide a focus on women's contributions to material culture and visual arts of the 19th century	$5,000
National Society of the Colonial Dames of America in the State of Texas	Neill-Cochran House 2130 San Gabriel Street Austin, TX 78705	Public Charity	Partial funding for a symposium sponsored by the Colonial Dames of America in the State of Texas, the Friends of the Governor's Mansion, the Texas Preservation Board, and the Bullock State History Museum on Abner Cook, the master builder	$5,000
Old Jail Art Center	201 South Second Street Albany, TX 76430	Public Charity	Endowment support for the professional archivist who oversees the Robert E. Nail, Jr Archives consisting of historic newspapers, primary documents, photographs, family and commercial papers and a Texana book collection	$7,500
Panhandle Inn Foundation	301 Main Street Panhandle, TX 79068	Public Charity	Funds for phase I of an adaptive reuse project focused on the historic Panhandle Inn in Panhandle, Texas, built in 1923 by Ernest O Thompson (acclaimed Railroad Commission member) and May Esther Peterson(Metropolitan Opera Star)	$20,000
Power of Preservation Foundation	P O Box 830295 San Antonio, TX 78283	Public Charity	Support for archival research on Tejano ranches along the Medina River in Southern Bexar County These locations offer the highest concentrations of previously identified early to mid 19th century Tejano ranch complexes	$16,500
Preservation Dallas	2922 Swiss Avenue Dallas, TX 75204-5928	Public Charity	Funds for an exhibition entitled "The Architectural Styles of Dallas " This effort is focused on educating the public about historic architecture's role in the cultural fabric of Dallas The Old Red Museum will house the exhibit	$5,000
San Augustine Garden Club	412 Livingston Street P O Box 221 San Augustine, TX 75972	Public Charity	Support for restoration of 1919 County Jail on grounds of the San Augustine County Courthouse in San Augustine, Texas The restored building will serve as an archival repository and Texana Library	$10,000
San Jacinto Museum of History Association	One Monument Circle La Porte (Houston), TX 77571-9585	Public Charity	Support to fund archeological investigations on a seven acre tract of land adjacent to NRG and the San Jacinto Battleground site	$7,500
St. Joseph's Indian School	Chamberlain, SD 57326	Church	Support for the maintenance of the student dormitory	$15,000
Stockyards Preservation Foundation	P O Box 136691 Fort Worth, TX 76136	Public Charity	Support to complete the interviews necessary for a documentary film on the history of the closure of the Fort Worth Stockyards 1970 to 2014	$5,000
Texas A&M University Press	John H Lindsey Building Lewis Street , 4354 TAMU College Station, TX 77843-4354	Department of Texas A&M University	Support for the publication of a major work entitled "The Material Culture of German Texans, 1836-1917, by Kenneth Hafertepe of Baylor University The volume will be the first comprehensive study of the art and artifacts of German Texans	$7,000
Texas Christian University Foundation Relations	TCU Box 297044 Fort Worth, TX 76129	University	Research support to collect and interpret 400 new interviews of black, brown, and white observers to the history of the overlapping African-American and Mexican-American civil rights struggles in Texas The end products book and website	$20,000
Texas Southern University Department of History	3100 Cleburne Street Houston, TX 77004	University	Support for three-day TSU Summer Workshop on African American History for 20 local K-16 teachers These programs will be at the following venues The African American Library, Texas Southern University, & Buffalo Soldier National Museum	$5,000

Texas State Historical Association 3001 Lake Austin Boulevard	3001 Lake Austin Boulevard Suite 3 116 Austin, TX 78703-5017	Public Charity	Major support to endow its education programs, expand its digital projects, and enhance its membership as well as increasing its operating support	$350,000
Texas State University Department of Anthropology	601 University Drive San Marcos, TX 78666-4616	University	Support for continued analysis on the age of the earliest cultural deposit in the prehistoric Gault archaeological site in Bell County	$5,000
University of Houston	5000 Gulf Freeway Building 1, Room 300 Houston, TX 77204	State University	Funds for an associate editor's position for Houston History magazine This support will permit the applicant to retain a graduate student for one year as a paid staff member Three issues of Houston History are published each year	$10,000
University of North Texas Department of History	1155 Union Circle #310650 Denton, TX 76203-5017	State Educational Institution	Continued support for the annual Teaching of History Conference(TCON) that has been serving the region for the past eighteen years Sponsors include the Philip R. Jonnson Foundation, the American Historical Assn and Phi Alpha Theta	$8,000
University of North Texas	1155 Union Circle #310650 Denton, TX 76203-5017	State Educational Institution	Support for the "Day at UNT" program, which uses the power of Texas history to introduce middle school students to the opportunities of college by enabling 7th graders to spend a day getting a behind-the-scenes look at life at a university	$6,679 04
University of Texas at Arlington University Libraries	Special Collections Division Box 19497 Arlington, TX 76019-0497	State Educational Institution	Gift of a daguerreotype in case of General Augustus Jones of Texas, Captain in the Mexican War, taken at Potosi, Missouri on September 1847	$7,500
University of Texas at Austin College of Liberal Arts	Dorothy E. Gebauer Building 116 Inner Campus Drive, G6000 Austin, TX 78712-1140	State Educational Institution	Support for a chair in Texas History at the University of Texas at Austin This chair supports a tenured University of Texas history professor who also serves as Chief Historian of the Texas State Historical Association	$500,000
University of Texas at Austin Dolph Briscoe Center for American History	2300 Red River Street Stop D1100 Austin, TX 78712	State Educational Institution	Funding toward the Briscoe Center for American History's renovation of our 42 year-old public service space	$10,000
University of Texas Rio Grande Valley Foundation	1201 West University Drive ITTB 1 210 Edinburg, TX 78539	Public Charity	Support to document and interpret the Civil War in the Rio Grande Valley through a brochure containing a map and guide with an associated website, podcasts and QR (Quick Response) codes that can provide a conceptual "walk" through history	$15,000
Witte Museum	3801 Broadway San Antonio, TX 78209-6396	Public Charity	Additional support toward research and writing for major work on the history of historic preservation in Texas This work will be the first effort of its kind to provide insight into the preservation leaders of our state	$7,500
				$1,196,479

THE SUMMERLEE FOUNDATION
EIN: 75-2252355
A Schedule Attached to and Made Part of Form 990-PF
For the Year Ended June 30, 2015
Schedule 6 - Grants Approved for Future Payment

Organization Name	Organization Address	Foundation Status of Recipient	Project Title	Amount Owed
Earth Island Institute/Wild Future	353 Wallace Way NE, Suite 12 Bainbridge Island, WA 98110	Public Charity	Support for 3 key projects for advancing Cougar conservation and providing services to wildlife organizations and activist	$30,000
Humane Society of the United States	700 Professional Drive Gaithersburg, MD 20879	Public Charity	Support for a collaborative pilot project to raise awareness about the plight of cougars, conduct outreach programs, promote policy reform, and encourage state wildlife agencies to adopt management plans that emphasize nonlethal coexistence	$460,000
Humane Society of the United States	700 Professional Drive Gaithersburg, MD 20879	Public Charity	Continued two year support for the Annie Lee Roberts Emergency Animal Rescue Fund	$175,000
Humane Society of the United States	700 Professional Drive Gaithersburg, MD 20879	Public Charity	Support for the fourth conference of the Humane Society Institute for Science and Policy, focusing on how to improve the situation for large wild carnivores in North America and examining the North American Model of Wildlife Management and its efficacy	$10,000
Panhandle Inn	301 Main Street Panhandle, TX 79068	Public Charity	Funds for phase I of an adaptive reuse project focused on the historic Panhandle Inn in Panhandle, Texas, built in 1923 by Ernest O Thompson (acclaimed Railroad Commission member) and May Esther Peterson(Metropolitan Opera Star)	$20,000
Panthera Corporation	8 West 40th Street 18th Floor New York, NY 10018	Public Charity	Two year support for Cougar Conservation Addressing Key Issues from North to South	$75,000
Southern Methodist University-Clements Center for Southwest Studies	P O Box 750176 Dallas, TX 75275-0176	Public Charity	Support to sustain Summerlee Foundation Fellowship at the Clements Center for Southwest Studies If approved, the fellowship would be funded for the academic years 2015-2016, 2016-2017, and 2017-2018	$195,000
Texas Christian University Foundation Relations	TCU Box 297044 Fort Worth, TX 76129	University	Research support to collect and interpret 400 new interviews of black, brown, and white observers to the history of the overlapping African-American and Mexican-American civil rights struggles in Texas The end products book and website	$20,000
				$985,000