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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](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2015**

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

Name of foundation <b>THE ORCHARD FOUNDATION C/O LEIGH FIBERS INC.</b>		A Employer identification number <b>04-6660214</b>
Number and street (or P O box number if mail is not delivered to street address) <b>100 LEDGEWOOD PLACE, SUITE 103</b>	Room/suite	B Telephone number <b>207-799-0686</b>
City or town, state or province, country, and ZIP or foreign postal code <b>ROCKLAND, MA 02370</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 11,259,027.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
1 Contributions, gifts, grants, etc., received		12,500.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		183,949.	183,949.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		21,919.			
b Gross sales price for all assets on line 6a <b>1,480,972.</b>					
7 Capital gain net income (from Part IV, line 2)			21,919.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		-4,372.	-4,372.		STATEMENT 2
12 Total. Add lines 1 through 11		213,996.	201,496.		
13 Compensation of officers, directors, trustees, etc		60,000.	0.		60,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		4,550.	0.		0.
c Other professional fees STMT 4		94,047.	94,047.		0.
17 Interest					
18 Taxes STMT 5		24,581.	2,260.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		25,107.	18,236.		4,475.
24 Total operating and administrative expenses. Add lines 13 through 23		208,285.	114,543.		64,475.
25 Contributions, gifts, grants paid		1,016,287.			1,016,287.
26 Total expenses and disbursements. Add lines 24 and 25		1,224,572.	114,543.		1,080,762.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-1,010,576.			
b Net investment income (if negative, enter -0-)			86,953.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

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2015.03040 THE ORCHARD FOUNDATION C/O 18642\_Y1

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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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	16,430.	14,271.	14,271.
	2 Savings and temporary cash investments	110,638.	93,095.	93,095.
	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			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	6,342,187.	5,267,643.	6,479,010.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment: basis ▶		
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 8)		4,115,217.	4,198,887.	4,672,651.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		10,584,472.	9,573,896.	11,259,027.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	10,584,472.	9,573,896.		
30 Total net assets or fund balances	10,584,472.	9,573,896.		
31 Total liabilities and net assets/fund balances	10,584,472.	9,573,896.		

**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	10,584,472.
2 Enter amount from Part I, line 27a	2	-1,010,576.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	9,573,896.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	9,573,896.

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**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 WILMINGTON TRUST	P	VARIOUS	12/31/15
b THE SANDERSON INTERNATIONAL VALUE	P	VARIOUS	12/31/15
c WILMINGTON REALTY	P	VARIOUS	12/31/15
d ISHARES S&P GSCI	P	VARIOUS	12/31/15
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 1,387,240.		1,449,589.	-62,349.
b 90,975.			90,975.
c 2,755.			2,755.
d 2.		9,464.	-9,462.
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			-62,349.
b			90,975.
c			2,755.
d			-9,462.
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	21,919.
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	N/A

**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))
2014	811,161.	12,935,581.	.062708
2013	656,865.	12,429,984.	.052845
2012	1,016,788.	11,917,210.	.085321
2011	1,924,466.	13,230,303.	.145459
2010	1,487,379.	13,669,575.	.108809

2 Total of line 1, column (d)	2	.455142
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	.091028
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	12,137,223.
5 Multiply line 4 by line 3	5	1,104,827.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	870.
7 Add lines 5 and 6	7	1,105,697.
8 Enter qualifying distributions from Part XII, line 4	8	1,080,762.

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.

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**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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	1,739.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> 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).			
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	1,739.
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	1,739.
6 Credits/Payments:			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a 14,889.		
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	14,889.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	1.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	13,149.	
11 Enter the amount of line 10 to be: Credited to 2016 estimated tax 13,149. Refunded	11	0.	

**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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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		X
c Did the foundation file Form 1120-POL for this year?		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? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) MA		
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	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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>HTTP://WWW.ORCHARDFOUNDATION.ORG</u>	X	
14 The books are in care of ► <u>BRIGITTE LEHNER KINGSBURY, EXEC DIR</u> Telephone no. ► <u>207-799-0686</u> Located at ► <u>C/O LEIGH FIBERS, 100 LEDGEWOOD PL, ROCKLAND, MA</u> ZIP+4 ► <u>02370</u>		
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		N/A
16 At any time during calendar year 2015, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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 2015?	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2015 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 2015) 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 2015?	4b	X

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**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)? ☐ Yes ☒ No  
Organizations relying on a current notice regarding disaster assistance check here ☐ N/A

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No  
If "Yes," attach the statement required by Regulations section 53.4945-5(d) ☐ N/A

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? ☐ Yes ☒ No  
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? ☐ Yes ☒ No

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

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

(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
CARL P. LEHNER C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE ROCKLAND, MA 02370	TRUSTEE 0.00	0.	0.	0.
BRIGITTE L. KINGSBURY C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE ROCKLAND, MA 02370	TR & EXEC DIR 20.00	60,000.	0.	0.
HEIDI LEHNER C/O LEIGH FIBERS, 100 LEDGEWOOD PLACE ROCKLAND, MA 02370	TRUSTEE 0.00	0.	0.	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
NONE				

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."**

[illegible]**Total** number of others receiving over \$50,000 for professional services

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0

<b>Part IX-A Summary of Direct Charitable Activities</b>	
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List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

## Expenses

1	N/A	
2		
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

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		
3	All other program-related investments. See instructions.	

**Total.** Add lines 1 through 3

0.

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**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	12,186,322.
b	Average of monthly cash balances	1b	135,732.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	12,322,054.
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	12,322,054.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	184,831.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,137,223.
6	Minimum investment return. Enter 5% of line 5	6	606,861.

**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	606,861.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	1,739.
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,739.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	605,122.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	605,122.
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	605,122.

**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	1,080,762.
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	
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	1,080,762.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,080,762.

**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.

Form 990-PF (2015)

**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

Form 990-PF (2015)

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**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				605,122.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010	806,194.			
b From 2011	1,267,913.			
c From 2012	427,666.			
d From 2013	43,128.			
e From 2014	179,271.			
f Total of lines 3a through e	2,724,172.			
4 Qualifying distributions for 2015 from Part XII, line 4: ▶ \$	1,080,762.			
a Applied to 2014, but not more than line 2a			0.	
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 2015 distributable amount				605,122.
e Remaining amount distributed out of corpus	475,640.			
5 Excess distributions carryover applied to 2015 (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	3,199,812.			
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 2014. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				0.
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 2010 not applied on line 5 or line 7	806,194.			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	2,393,618.			
10 Analysis of line 9:				
a Excess from 2011	1,267,913.			
b Excess from 2012	427,666.			
c Excess from 2013	43,128.			
d Excess from 2014	179,271.			
e Excess from 2015	475,640.			

**THE ORCHARD FOUNDATION  
C/O LEIGH FIBERS INC.**

Form 990-PF (2015)

04-6660214 Page 10

**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 2015, 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)

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

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	
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).)

**SEE STATEMENT 9**

- 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:  
**SEE ATTACHED INFORMATION**

b The form in which applications should be submitted and information and materials they should include:  
**SEE ATTACHED INFORMATION**

c Any submission deadlines:  
**SEE ATTACHED INFORMATION**

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

**THE ORCHARD FOUNDATION**  
**C/O LEIGH FIBERS INC.**

**Part XV. Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
ALL RECIPIENTS ARE PUBLIC CHARITIES:				
SEE ATTACHED SCHEDULE (THERE ARE NO INDIVIDUAL RECIPIENTS)			SEE ATTACHED SCHEDULE	1,016,287.
<b>Total</b>			▶ <b>3a</b>	1,016,287.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			▶ <b>3b</b>	0.

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	183,949.	
		14	-4,372.	
		18	21,919.	
	0.		201,496.	0.

13
201,496.

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

[illegible]

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

- |   |  |       |
|---|--|-------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  | Yes   |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of:   |       |
|   | (1) Cash   | 1a(1) |
|   | (2) Other assets   | 1a(2) |
| b | Other transactions:  |       |
|   | (1) Sales of assets to a noncharitable exempt organization   | 1b(1) |
|   | (2) Purchases of assets from a noncharitable exempt organization   | 1b(2) |
|   | (3) Rental of facilities, equipment, or other assets   | 1b(3) |
|   | (4) Reimbursement arrangements   | 1b(4) |
|   | (5) Loans or loan guarantees   | 1b(5) |
|   | (6) Performance of services or membership or fundraising solicitations   | 1b(6) |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | 1c    |
| 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. |       |

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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. 7)? <input checked="checked" type="checkbox"/> Yes <input type="checkbox"/> No		
	Signature of officer or trustee <i>Laurie Bencal</i>		Date <i>5/12/16</i>			Title <i>Executive Director</i>	
Paid Preparer Use Only	Print/Type preparer's name		Preparer's signature		Date	Check <input type="checkbox"/> if self-employed	PTIN
	LAURIE BENCAL		<i>Laurie Bencal</i>		05/04/16		P00354967
	Firm's name ▶ CBIZ TOFIAS					Firm's EIN ▶ 26-3753134	
	Firm's address ▶ 500 BOYLSTON STREET BOSTON, MA 02116					Phone no. 617-761-0600	

**Schedule B**  
(Form 990, 990-EZ, or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2015**

Name of the organization

THE ORCHARD FOUNDATION  
C/O LEIGH FIBERS INC.

Employer identification number

04-6660214

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization

THE ORCHARD FOUNDATION  
C/O LEIGH FIBERS INC.

Employer identification number

04-6660214

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	LEIGH FIBERS HOLDINGS INC 100 LEDGEWOOD PLACE #103 ROCKLAND, MA 02370	\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Employer identification number

04-6660214

(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b)  Description of noncash property given	(c)  FMV (or estimate) (see instructions)	(d)  Date received
	<hr/> <hr/> <hr/>	\$ _____	_____

Name of organization <b>THE ORCHARD FOUNDATION C/O LEIGH FIBERS INC.</b>	Employer identification number <b>04-6660214</b>
---	---

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

# **ORCHARD FOUNDATION GRANTS LIST 2015**

Legal address:  
c/o Leigh Fibers  
100 Ledgewood Place, Suite 103  
Rockland, MA 02370

Mailing address:  
c/o Ms. Brigitte L. Kingsbury, Executive Director  
PO Box 2587  
So. Portland, ME 04116

<u>Recipient</u>	<u>Purpose</u>	<u>Amount (\$)</u>
(AFPCC) American Friends for the Preservation of Czech Culture P.O. Box 814 Dover, MA 02030	Museum	350.00
Arthritis Foundation. Massachusetts Chapter 29 Crafts Street, Suite 450 Newton, MA 02458-1275	General Operating Support	350.00
Boston Children's Hospital Trust 401 Park Drive, 6 <sup>th</sup> floor Boston, MA 02215	Chair in Rheumatology	165,000.00
Boston Children's Hospital Trust 401 Park Drive, 6 <sup>th</sup> floor Boston, MA 02215	Division of Developmental Medicine Program	25,000.00
Boston Preservation Alliance 45 School Street – Old City Hall Boston, MA 02108	Annual Appeal	200.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Annual Fund	1,000.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Scholarship Fund	5,000.00
Buckingham Browne & Nichols School 80 Gerry's Landing Road Cambridge, MA 02138-5595	Senior Year Gift	5,000.00
Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	General Operating Support (1)	2,000.00
Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	General Operating Support (2)	1,000.00
Common Hope P.O. Box 8228 St. Paul, MN 55108	House & stove construction support in Guatemala	5,000.00
Concord Academy 166 Main Street Concord, MA 01742	Annual Fund	2,000.00

Conservation Law Foundation 62 Summer Street Boston, MA 02110	General Operating Support for Maine Advocacy Office	10,000.00
Conservation Law Foundation 62 Summer Street Boston, MA 02110	Leadership Campaign	12,000.00
Earthjustice 50 California Street, Suite 500 San Francisco, CA 94111	Healthy Communities Program	25,000.00
Environmental Grantmakers Association 475 Riverside Drive, Suite 960 New York, NY 10115	General Operating Support	2,437.00
Equality Now! P.O. Box 20646, Columbus Circle Station New York, NY 10023	General Operating Support	5,000.00
Exponent Philanthropy 1720 N Street, NW Washington DC 20036	General Operating Support	750.00
First Parish in Cohasset 23 North Main Street Cohasset, MA 02025	General Operating Support	10,000.00
Glastonbury Abbey-Benedictine Monks 16 Hull Street Hingham, MA 02043	General Operating Support	3,000.00
Grace Church 75 Main Street Hastings-on-Hudson, NY 10706	General Operating Support (1)	18,000.00
Grace Church 75 Main Street Hastings-on-Hudson, NY 10706	General Operating Support (2)	2,000.00
Harvard University David Rockefeller Center for Latin American Studies 1730 Cambridge Street Cambridge, MA 02138	General Operating Support	10,000.00
Harvard University Harvard College Fund 124 Mount Auburn Street Cambridge, MA 02138-5762	General Operating Support	1,500.00
Hearth, Inc. 1640 Washington Street Boston, MA 02118	General Operating Support	5,000.00

High Mountain Institute 531 County Road 5A Leadville, CO 80461	HMI Campaign	5,000.00
Himalayan Education Foundation 49 Pine Street Peterborough, NH 03458	General Operating Support	2,000.00
Hingham Historical Society PO Box 434 Hingham, MA 02043	General Operating Support	1,500.00
Hingham Land Conservation Trust P.O. Box 10 Hingham, MA 02043	General Operating Support	2,000.00
Historic New England 141 Cambridge Street Boston, MA 02114	Annual Appeal	200.00
Island Academy POB W1884 St. Johns, Antigua, West Indies	Scholarship Fund	10,000.00
The Lahey Clinic Foundation 41 Mall Road Burlington, MA 01805	Orthopaedic Department & Cardiothoracic Residency Training Program	25,000.00
The Lahey Clinic Foundation 41 Mall Road Burlington, MA 01805	Construction of new emergency room	20,000.00
Maine Community Foundation – Quality of Place Fund 245 Main Street Ellsworth, ME 04605	RGGI analysis report/EFN	5,000.00
Maine Conservation Alliance 295 Water Street, Suite 9 Augusta, ME 04330	General Operating Support	10,000.00
Maine Philanthropy Center P.O. Box 9301 - USM Glickman Family Library Portland, ME 04104-9301	General Operating Support	700.00
Massachusetts Institute of Technology 238 Main Street, Suite 200 Cambridge, MA 02142-1012	Mechanical Engineering Department	70,000.00
The MacDowell Colony 163 East 81 <sup>st</sup> Street New York, NY 10028	General Operating Support	5,000.00

McLean Hospital Neuroregeneration Research Institute 115 Mill Street Belmont, MA 02478	Parkinson's Disease Research	120,000.00
Medecins Sans Frontieres USA 333 7 <sup>th</sup> Avenue New York, NY 10001-5004	General Operating Support	2,000.00
Middlebury College Office of College Advancement Munford House Middlebury, VT 05753	Environmental Program Fund (1)	5,000.00
Middlebury College Office of College Advancement Munford House Middlebury, VT 05753	Environmental Program Fund (2)	25,000.00
Milton Academy 170 Centre Street Milton, MA 02186	Annual Fund	200 00
The M.I.S.S. of the Treasure Coast 4434 SE Checkley Way Stuart, FL 34997	General Operating Support	10,000.00
The Monadnock Conservancy POB 337 Keene, NH 03431	General Operating Support (1)	1,000.00
The Monadnock Conservancy POB 337 Keene, NH 03431	General Operating Support (2)	2,000.00
Museum of Fine Arts 465 Huntington Avenue Boston, MA 02115	General Purposes	15,000.00
Natural Resources Council of Maine 3 Wade Street Augusta, ME 04330	General Operating Support	5,000.00
Natural Resources Defense Council 40 West 20 <sup>th</sup> Street New York, NY 10011	Toxics Reduction Program	50,000.00
Planned Parenthood Federation of America 434 West 33 <sup>rd</sup> Street New York, NY 10001	General Operating Support	10,000.00
Rachel's Network 1200 18 <sup>th</sup> Street NW, Suite 310 Washington DC 20036	General Operating Support	5,000.00

Rainforest Alliance 233 Broadway, 28 <sup>th</sup> Floor New York, NY 10279	General Operating Support	10,000.00
Resurrection Parish 1057 Main Street Hingham, MA 02043-3960	General Operating Support	300.00
The Salvation Army 25 Shawmut Road Canton, MA 02021	General Operating Support	5,000.00
Scenic Hudson 9 Vasser Street Poughkeepsie, NY 12601-3091	General Operating Support	10,000.00
Scenic Hudson 9 Vasser Street Poughkeepsie, NY 12601-3091	PCB project	10,000.00
Smith College Alumnae Fund 33 Elm Street Northampton, MA 01063-0024	Annual Fund and the Ada Comstock Scholars Program	1,500.00
Society of Architectural Historians 1365 North Astor Street Chicago, IL 60610-2144	Annual Appeal	300.00
South Shore Hospital Charitable Foundation 55 Fogg Road South Weymouth, MA 02190-2455	Campaign for Healing, Caring and Comforting	20,000.00
The Spartanburg County Foundation 424 E. Kennedy Street Spartanburg, SC 29302	Donor-Advised Fund (1)	100,000.00
The Spartanburg County Foundation 424 E. Kennedy Street Spartanburg, SC 29302	Donor-Advised Fund (2)	100,000.00
St. Paul's Parish 147 North Street Hingham, MA 02043	General Operating Support	5,000 00
Trustees of Hampshire College Institutional Advancement, Hampshire College 893 West Street Amherst, MA 01002	Writing Program	5,000.00
The Trustees of Reservations 572 Essex Street Beverly, MA 01915-1530	General Operating Support	1,500.00

Waterkeeper Alliance 17 Battery Place, Suite 1329 New York, NY 10004	General Operating Support	5,000.00
WBUR - Radio 90.9 FM 890 Commonwealth Avenue Boston, MA 02215	WBUR Radio Station Fund/ General Operating Support (1)	1,500.00
WBUR - Radio 90.9 FM 890 Commonwealth Avenue Boston, MA 02215	WBUR Radio Station Fund/ General Operating Support (2)	1,500.00
Wellspring Multi-Service Center 814 Nantasket Ave Hull, MA 02045	General Operating Support	5,000.00
WGBH - Channel 2 125 Western Avenue Boston, MA 02134	General Operating Support	1,500.00
Zamorano 1701 Pennsylvania Ave., NW, Suite 300 Washington DC 20006	Renewable Energy Center	10,000.00
	<b>Total 2015 Contributions:</b>	<b>\$ 1,016,287.00</b>



## ORCHARD FOUNDATION

### IMPORTANT update for September 2013:

The Orchard Foundation will no longer accept unsolicited Concept Letters, Letters of Inquiry, or Proposals. All funding in the future will be done on a Pre-Selected Organization (PSO) basis only. Occasionally, Request for Proposals (RFPs) may be sent out to a select number of organizations.

The Orchard Foundation is a private charitable foundation, founded in 1990, that makes grants to non-profit organizations concerned with the environment and children, youth and families in New York and New England.

Please note that a part-time Executive Director staffs the office. Therefore, assume an answering machine will answer your phone call; be prepared to leave a message. Better yet, if you have a question, send an email. While the foundation office is closed for July and August, we do check our phone and email messages from time to time, so we will eventually get to your queries.

Executive Director  
Orchard Foundation  
P.O. Box 2587  
So. Portland, ME 04116  
phone (207) 799-0686  
orchard@maine.rr.com  
[www.orchardfoundation.org](http://www.orchardfoundation.org)

# The Orchard Foundation

 Search this site**Navigation**[Home](#)[Guidelines](#)[Program Areas](#)[Grant lists](#)[Sitemap](#)[Home >](#)

## Guidelines

# ORCHARD FOUNDATION

P.O. BOX 2587

SOUTH PORTLAND, ME 04116

## APPLICATION GUIDELINES:

**Foundation Update:** The Orchard Foundation will no longer accept unsolicited Concept Letters, Letters of Inquiry , or Proposals. All funding in the future will be done on a Pre-Selected Organization (PSO) basis only. Occasionally, Request for Proposals (RFPs) may be sent to a select number of organizations.

**If a Request for Proposal is sent to your organization, please read the following information:**

Types of Support: Generally the foundation makes only restricted grants, favoring requests supporting specific projects and programs. The foundation will on rare occasions provide seed money and operating support to smaller organizations. An average one-year grant ranges from \$10,000 to \$25,000.

Geographical Limitations: The foundation funds in Massachusetts, Maine, New Hampshire, New York and Vermont.

Program Limitations: Grants are not made to individuals, or for endowments, annual or capital campaigns, museums, religious programs, any religion-affiliated organization, conference participation/travel unrelated to current foundation grant, scholarships, fellowships, building projects, equipment needs,

or film and video projects. Loans are not made. Please see Program Area Guidelines (also available from the foundation) for further program limitations specific to the individual program areas.

**If a Proposal is Invited:** Please submit a letter that includes a problem statement, the goals of the project, a plan of action, the qualifications of the organization to fulfill the plan and a method of evaluation. You can assume that the foundation is generally familiar with the subject areas that it funds and need not provide general background into the problem. The entire proposal body should be **no longer** than two pages.

Supplemental materials needed are a one-page project budget and a one-page operating budget. If available at your website please include direct web links to a board member list, a copy of the last annual financial statement, an annual report, and a list of foundation and corporate supporters for current and most recent fiscal years in your email cover note. If any of these are NOT available at your website, please send with the proposal and budgets. All materials MUST be submitted via email to [orchard@maine.rr.com](mailto:orchard@maine.rr.com) either as a Word attachment, a PDF document, or an Excel attachment. Please submit proposals, budgets and supplemental material in separate attachments. Please check that the letter includes a contact name, address, phone number, email address, organizational web site address, and **EIN number**.

**Reporting Requirements:** Funded organizations must submit a two-page narrative project assessment and a one-page financial report of how the grant moneys were expended. The report deadline will be given when a project is funded and is generally within 13 months of the grant award. This report must be submitted via email to [orchard@maine.rr.com](mailto:orchard@maine.rr.com).

Executive Director  
Orchard Foundation  
P.O. Box 2587  
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Phone: (207) 799-0686  
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[www.orchardfoundation.org](http://www.orchardfoundation.org)

The Orchard Foundation is a member of the Association of

## Small Foundations, the Environmental Grantmakers Association and the Maine Philanthropy Center.

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# The Orchard Foundation

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## Program Areas

# ORCHARD FOUNDATION

### Program Areas:

**Foundation Update:** The Orchard Foundation will no longer accept unsolicited Concept Letters, Letters of inquiry, or Proposals. All funding in the future will be done on a Pre-Selected Organization (PSO) basis only. Occasionally, Request for Proposals (RFPs) may be sent to a select number of organizations.

**If a Request for Proposal is sent to your organization, please read the following information:**

***Environment*** - The foundation funds in the following areas: air quality, global climate change, fresh and coastal waters and forests. The Orchard Foundation favors advocacy (principally legal, governmental agencies, and administrative process participation advocacy) projects.

***Areas not funded:*** Given that the Orchard Foundation is a very small foundation, it is impossible to fund all projects that fall into our primary environmental program areas. Therefore it is easier to list some of the areas which the foundation board is *not* interested in funding. We *will not* be sending out RFPs for the following areas: general citizen organizing and public awareness-building projects, environmental education projects (for adults or children), ocean fisheries, growth management and sprawl, toxic substances and pollution prevention, animal rights, animal hospitals or rehabilitation centers, species specific projects, scientific research, and land acquisition.

***Reproductive Rights*** - The foundation funds projects advocating for reproductive rights for adolescents, in addition to projects aiming for comprehensive sexuality education for middle and high school students.

***Funding limitations:*** Most funding disbursed by the foundation is done

on a designated giving basis only. These grants are at the discretion of the trustees and no correspondence concerning them will be considered. The complete grants list can be found at [www.guidestar.org](http://www.guidestar.org) by examining the latest PF 990 tax return.

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FORM 990-PF                      DIVIDENDS AND INTEREST FROM SECURITIES                      STATEMENT      1

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ISHARES S&P GSCI COMMODITY-INDEXED TRUST	13.	0.	13.	13.	
SANDERSON INT'L VALUE TABACCO FREE FUND	36,180.	0.	36,180.	36,180.	
WILMINGTON REALTY I, LLC	226.	0.	226.	226.	
WILMINGTON TRUST - DIVIDENDS	147,530.	0.	147,530.	147,530.	
TO PART I, LINE 4	183,949.	0.	183,949.	183,949.	

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FORM 990-PF                      OTHER INCOME                      STATEMENT      2

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
OTHER INVESTMENT INCOME	-4,372.	-4,372.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-4,372.	-4,372.	

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FORM 990-PF                      ACCOUNTING FEES                      STATEMENT      3

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION AND ACCOUNTING FEES	4,550.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	4,550.	0.		0.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	94,047.	94,047.		0.
TO FORM 990-PF, PG 1, LN 16C	94,047.	94,047.		0.

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FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	2,260.	2,260.		0.
FEDERAL TAX	22,321.	0.		0.
TO FORM 990-PF, PG 1, LN 18	24,581.	2,260.		0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSE	1,216.	0.		1,216.
TELEPHONE/INTERNET	1,464.	0.		1,464.
STATE FILING FEES	70.	0.		0.
CONFERENCES & MEETINGS	1,410.	0.		1,410.
BANK FEES	60.	0.		0.
INSURANCE	2,266.	0.		0.
TRAVEL	385.	0.		385.
K1 WILMINGTON REALTY - INTEREST EXPENSE	17,110.	17,110.		0.
K1 WILMINGTON REALTY - OTHER DEDUCTIONS	1,126.	1,126.		0.
TO FORM 990-PF, PG 1, LN 23	25,107.	18,236.		4,475.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	5,267,643.	6,479,010.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,267,643.	6,479,010.

FORM 990-PF	OTHER ASSETS	STATEMENT	8
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
WILMINGTON REALTY I LLC	461,998.	389,780.	42,966.
SANDERSON INT'L TOBACCO FREE FUND	901,314.	1,016,940.	1,076,735.
WEATHERLOW OFFSHORE FUND I LTD	1,592,167.	1,592,167.	2,131,091.
ARCHSTONE OFFSHORE FUND LTD	1,200,000.	1,200,000.	1,421,859.
ISHARES S&P GSCI COMMODITY-INDEXED TRUST	-40,262.	0.	0.
TO FORM 990-PF, PART II, LINE 15	4,115,217.	4,198,887.	4,672,651.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	9
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## NAME OF MANAGER

CARL P. LEHNER  
BRIGITTE L. KINGSBURY  
HEIDI LEHNER