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For calendar year 2015, or tax year beginning 01-01-2015 , and ending 12-31-2015

Name of foundation The Poetry Foundation		A Employer identification number 36-2490808	
% CAREN SKOULAS Number and street (or P O box number if mail is not delivered to street address) 61 West Superior Street		Room/suite	B Telephone number (see instructions) (312) 787-7070
City or town, state or province, country, and ZIP or foreign postal code Chicago, IL 60654		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ A 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) \$ 237,757,155		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	80,279			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	461	461	461	
	4 Dividends and interest from securities	4,345,466	4,345,466	4,345,466	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	4,119,467			
	b Gross sales price for all assets on line 6a 9,991,162				
	7 Capital gain net income (from Part IV , line 2)		4,134,356		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	886,124	246,084	632,457	
	12 Total. Add lines 1 through 11	9,431,797	8,726,367	4,978,384	
	13 Compensation of officers, directors, trustees, etc	634,200	78,705	78,705	555,495
	14 Other employee salaries and wages	1,362,701	9,800	9,800	1,364,824
	15 Pension plans, employee benefits	505,526	24,626	24,626	257,586
	16a Legal fees (attach schedule).	203,639	17,345	17,345	191,366
	b Accounting fees (attach schedule).	79,627	7,963	7,963	73,664
	c Other professional fees (attach schedule)	739,534	69,250	69,250	683,487
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	223,152	90,929	90,929	184,818
	19 Depreciation (attach schedule) and depletion	767,854	27,500	27,500	
	20 Occupancy	1,104,445	36,216	36,216	1,097,692
	21 Travel, conferences, and meetings.	531,395			554,316
	22 Printing and publications	1,053,459		469,416	592,422
	23 Other expenses (attach schedule).	1,232,717	393,038	546,356	753,190
	24 Total operating and administrative expenses. Add lines 13 through 23	8,438,249	755,372	1,378,106	6,308,860
	25 Contributions, gifts, grants paid	1,208,600			1,203,100
	26 Total expenses and disbursements. Add lines 24 and 25	9,646,849	755,372	1,378,106	7,511,960
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-215,052			
	b Net investment income (if negative, enter -0-)		7,970,995		
	c Adjusted net income (if negative, enter -0-)			3,600,278	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	632,275	748,757	748,757
	2	Savings and temporary cash investments	1,359,150	2,710,608	2,710,608
	3	Accounts receivable ▶ <u>49,463</u>			
		Less allowance for doubtful accounts ▶ <u>1,431</u>	49,354	48,032	48,032
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	415,544	579,293	579,293
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	124,774,209 	125,133,645	125,133,645
	c	Investments—corporate bonds (attach schedule)	49,660,962 	46,763,041	46,763,041
	11	Investments—land, buildings, and equipment basis ▶ _____			
		Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	32,040,375 	32,056,389	32,056,389
	14	Land, buildings, and equipment basis ▶ <u>25,237,751</u>			
		Less accumulated depreciation (attach schedule) ▶ <u>4,375,095</u>	20,723,497	20,862,656	20,862,656
	15	Other assets (describe ▶ _____)	 14,813,576 	 8,854,734 	 8,854,734
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	244,468,942	237,757,155	237,757,155
	17	Accounts payable and accrued expenses	620,672	276,280	
	18	Grants payable	103,000	103,000	
	19	Deferred revenue	480,901	455,840	
	20	Loans from officers, directors, trustees, and other disqualified persons			
Net Assets or Fund Balances	21	Mortgages and other notes payable (attach schedule)	14,165,000 	13,870,000	
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	15,369,573	14,705,120	
		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	213,143,348	213,062,714	
	25	Temporarily restricted	14,624,579	8,657,879	
	26	Permanently restricted	1,331,442	1,331,442	
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	229,099,369	223,052,035	
	31	Total liabilities and net assets/fund balances (see instructions)	244,468,942	237,757,155	

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	229,099,369
2	Enter amount from Part I, line 27a	2	-215,052
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	228,884,317
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	5,832,282
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	223,052,035

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
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	4,134,356
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	-227,814

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 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			
2013			
2012			
2011			
2010			

2 Total of line 1, column (d).	2	
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	
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	
5 Multiply line 4 by line 3.	5	
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	
7 Add lines 5 and 6.	7	
8 Enter qualifying distributions from Part XII, line 4.	8	

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 page 18 of the instructions)

1a

Exempt operating foundations described in section 4940(d)(2), check here ☒ and enter "N/A" on line 1
Date of ruling or determination letter 2008-08-01
(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)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

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.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ **Refunded** ☐

1

N/A

2

3

0

4

5

0

6a

6b

6c

6d

7

0

8

9

0

10

11

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>			No
1b				No
c	Did the foundation file Form 1120-POL for this year?			No
1c				No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5		No
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	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IL _____			
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? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	Yes	
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>www.poetryfoundation.org</u>	13	Yes	
14	The books are in care of ► <u>CAREN SKOULAS</u> Telephone no ► <u>(312) 799-8001</u> Located at ► <u>61 WEST SUPERIOR STREET CHICAGO IL</u> ZIP+4 ► <u>60654</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 15			
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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ►	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015? ☐ Yes ☒ No	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
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). ☐ Yes ☒ No	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 ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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). ☐ Yes ☒ No	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		☐ 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)?			5b	Yes
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?		☒ 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
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?			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 (see instructions).**

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DON SHARE 61 W SUPERIOR ST CHICAGO, IL 60654	POETRY EDITOR 35 0	111,000	21,967	0
STEVEN YOUNG 61 W SUPERIOR ST CHICAGO, IL 60654	PROGRAM DIRECTOR 35 0	108,000	20,964	0
CASSIE MAYER 61 W SUPERIOR ST CHICAGO, IL 60654	DIGITAL PROGRAM DIR 35 0	91,250	8,588	0
ELIZABETH BURKE-DAIN 61 W SUPERIOR ST CHICAGO, IL 60654	MEDIA/MARKETING DIR 35 0	76,000	23,943	0
KATHERINE LITWIN 61 W SUPERIOR ST CHICAGO, IL 60654	LIBRARY DIRECTOR 35 0	70,999	15,091	0

Total number of other employees paid over \$50,000. 	5
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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 (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
The Nerderly 9555 James Ave S Suite 245 BLOOMINGTON, MN 55431	Software Design	954,474
Cenveo Publisher Services PO Box 822934 PHILADELPHIA, PA 191822934	PRINTING & MAIL SVC	261,188
Palm Coast Data LLC 3787 Solutions Center CHICAGO, IL 60677	fulfillment service	192,599
Mayer Brown LLP 2027 Collection Center Dr CHICAGO, IL 60693	legal services	169,109
Isaacson Miller Inc 263 Summer St BOSTON, MA 02210	recruitment service	117,587
Total number of others receiving over \$50,000 for professional services. ▶		5

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 EDUCATIONAL AND PUBLIC PROGRAMS AND PRIZES	2,803,799
2 POETRY FOUNDATION ORG	2,381,512
3 "POETRY" MAGAZINE	1,000,476
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	

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	208,857,056
b	Average of monthly cash balances.	1b	5,198,165
c	Fair market value of all other assets (see instructions).	1c	761,414
d	Total (add lines 1a, b, and c).	1d	214,816,635
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	135,750
3	Subtract line 2 from line 1d.	3	214,680,885
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	3,220,213
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	211,460,672
6	Minimum investment return. Enter 5% of line 5.	6	10,573,034

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	
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	

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	7,511,960
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	1,185,112
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	8,697,072
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	8,697,072

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ _____				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2015 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				
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).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.				
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling. 2008-08-01

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

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	3,600,278	3,299,062	3,245,899	3,058,845	13,204,084
b 85% of line 2a	3,060,236	2,804,203	2,759,014	2,600,018	11,223,471
c Qualifying distributions from Part XII, line 4 for each year listed	8,697,072	7,142,292	6,988,052	7,155,131	29,982,547
d Amounts included in line 2c not used directly for active conduct of exempt activities	1,203,100	1,004,950	959,200	834,950	4,002,200
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	7,493,972	6,137,342	6,028,852	6,320,181	25,980,347
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets	0	0			0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)	0				0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.	7,048,689	6,800,445	5,969,249	5,242,294	25,060,677
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

Part XV Supplementary Information (Complete this part only if the organization 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

Stephen Young Program Director
61 West Superior Street
Chicago, IL 60654
(312) 799-8002

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

FOR GRANTS TO EXEMPT ORGANIZATIONS, APPLICATIONS SHOULD BE MADE BY LETTER AND SHOULD INCLUDE INFORMATION ABOUT THE REQUESTING ORGANIZATION AND A DETAILED DESCRIPTION OF HOW THE GRANT WILL BE USED. APPLYING ORGANIZATIONS SHOULD INCLUDE DOCUMENTS VERIFYING TAX STATUS. APPLICATIONS FOR SUPPORT FOR NEEDY POETS SHOULD BE MADE BY LETTER BY INDIVIDUALS NOT RELATED TO THE POET. INFORMATION THAT ALLOWS THE FOUNDATION TO VERIFY THE POET'S STATUS MUST BE PROVIDED.

c Any submission deadlines

THERE ARE NO SUBMISSION DEADLINES. GRANT APPLICATIONS ARE REVIEWED PERIODICALLY ON A YEAR-ROUND BASIS.

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

THE POETRY FOUNDATION IS A PRIVATE EXEMPT OPERATING FOUNDATION AND PRIMARILY RUNS ITS OWN PROGRAMS. WE HAVE A SMALL GRANTS PROGRAM FOR ORGANIZATIONS WHOSE WORK IS CONSISTENT WITH THE FOUNDATION'S MISSION AND WHO MAY BE BETTER ABLE TO FULFILL THE FOUNDATION'S MISSION IN PARTICULAR AREAS. WE ALSO HAVE A SMALL FUND TO PROVIDE FINANCIAL SUPPORT TO POETS IN EMERGENCY FINANCIAL SITUATIONS, PRIMARILY RELATED TO HEALTHCARE.

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,203,100
b Approved for future payment See Additional Data Table				
Total			3b	103,000

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received				

[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

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.		
	*****	2016-11-15	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

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

Paid Preparer Use Only	Print/Type preparer's name Bridget T Roche	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00666837
	Firm's name ☐ GRANT THORNTON LLP			Firm's EIN ☐	
	Firm's address ☐ 171 N CLARK ST SUITE 200 CHICAGO, IL 60601			Phone no ☐ (312) 856-0200	

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
PUBLICALLY TRADED SECURITIES-CAP GN DIST PROPERTY TYPE SECURITIES	P		
PUBLICALLY TRADED SECURITIES-CAP GN DIST PROPERTY TYPE SECURITIES	P		
PUBLICALLY TRADED SECURITIES-CAP GN DIST PROPERTY SECURITIES	P		
PUBLICALLY TRADED SECURITIES-CAP GN DIST PROPERTY SECURITIES	P		
PUBLICALLY TRADED SECURITIES-CAP GN DIST PROPERTY SECURITIES	P		
PUBLICALLY TRADED SECURITIES-SHORT TERM PROPERTY TYPE SECURITIES	P		
PUBLICALLY TRADED SECURITIES-LONG TERM PROPERTY TYPE SECURITIES			
PUBLICALLY TRADED SECURITIES-LONG TERM PROPERTY TYPE SECURITIES	P		
LT CAPITAL GAIN FROM LPS- SECURITIES	P		
ST CAPITAL GAIN FROM LPS- SECURITIES	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
232,182			232,182
1,134,124			1,134,124
42,711			42,711
110,011			110,011
288,509			288,509
897,412		1,141,679	-244,267
1,346,117		1,671,497	-325,380
3,033,089		3,066,177	-33,088
2,913,101			2,913,101
16,453			16,453

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			232,182
			1,134,124
			42,711
			110,011
			288,509
			-244,267
			-325,380
			-33,088
			2,913,101
			16,453

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
HENRY BIENEN	PRESIDENT (AS OF 7/2015) 35 0	174,305	24,000	0
61 West Superior Street Chicago,IL 60654				
LONNIE BUNCH	TRUSTEE 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Willard Bunn	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Gail Bush	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Kim Coventry	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Tom Cronin	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Manan Godfrey	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
John J Kenney	Chair 35 0	0	0	
61 West Superior Street Chicago,IL 60654				
Richard Kiphart	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Stuart Miller	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Susan Noyes	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
David Ormesher	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Charlie Pierce	Vice Chair 35 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Robert Polito	President (THRU 6/2015) 35 0	199,590	40,087	0
61 West Superior Street Chicago,IL 60654				
Paul Ruxin	Trustee 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Caren Skoulas	CFO 35 0	187,750	69,979	0
61 West Superior Street Chicago,IL 60654				
SCOTT TURROW	TRUSTEE 2 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Robert Wedgeworth	Vice Chair 35 0	0	0	0
61 West Superior Street Chicago,IL 60654				
Benna Wilde	Secretary 35 0	0	0	0
61 West Superior Street Chicago,IL 60654				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Academy of American Poets 75 Maiden Lane Ste 901 New York, NY 10038	None	PC	National Poetry Month Sponsorship	10,000
Alliance for Young Artists & Writers Inc 57 Broadway New York, NY 10012	None	PC	National Student Poets Program	20,000
American Public Media PO Box 70870 St Paul, MN 551709788	None	PC	Sponsorship of The Writer's Almanac	120,000
Arts Alliance Illinois 70 E Lake St Chicago, IL 60601	None	PC	Institutional Partner Membership	1,000
AWP 4400 University Dr Fairfax, VA 22030	None	PC	AWP Conference Sponsorship	10,000
Brooklyn Academy of Music 30 Lafayette Avenue Brooklyn, NY 11217	None	PC	Program Support	60,000
Cave Canem Foundations Inc 20 Jay St Ste 310-A Brooklyn, NY 11201	None	PC	General Support of Poetry Programs	15,000
Chicago Book Expo 911 Michigan Ave 2 Evanston, IL 60202	None	PC	General Support of Poetry Programs	1,000
Dorothy Lasky 404 W 116th St Apt 43 New York, NY 10027	None	NC	Blackbox Award	2,500
Ecrivains en Bord de Mer 61 Rue Amiral du Chaffault Paris FR	None	NC	General Support of Poetry Programs	6,600
Guild Complex PO Box 478880 Chicago, IL 606479998	None	PC	General Support of Poetry Programs	13,000
Massachusetts Museum of Contemporary Art 1040 MASS MoCA Way North Adams, MA 01247	None	PC	Poetry Festival Activity	4,000
National Public Radio 1111 North Capitol Street NE Washington, DC 20002	None	PC	General Support of Poetry Programs	150,000
Noble Network of Charter Schools 1 N State St Chicago, IL 60602	None	PC	General Support of Poetry Programs	7,500
Northeastern Ill University Foundation 5500 N St Louis Ave Chicago, IL 60625	None	PC	General Support of Poetry Programs	10,000
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Poetry Society of America 15 Gramercy Park New York, NY 10003	None	PC	General Support of Poetry Programs	10,000
Poets In Need PO Box 5411 Berkeley, CA 94705	None	PC	Poets in Need	20,000
Snow City Arts Foundation 1653 W Congress Pkwy Chicago, IL 60612	None	PC	General Support of Poetry Programs	10,000
Spudnik Press Cooperative 1821 W Hubbard Ste 302 Chicago, IL 60622	None	PC	Annual Printers' Ball Sponsorship	15,000
Team Englewood Academy 6201 S Stewart Ave Chicago, IL 60621	None	PC	High School Poetry Exchange	7,500
The Poetry Center of Chicago 78 E Washington Chicago, IL 60602	None	PC	Hands-on-Stanzas Poetry Scholarship Support	10,000
University of Nebraska 151 Whittier Research Center Lincoln, NE 68583	None	PC	Poetry in Newspapers Syndication	35,000
WETA 2775 S Quincy St Arlington, VA 222062269	None	PC	PBS NewsHour Sponsorship	200,000
WGBH 1 Guest St Boston, MA 021352016	None	PC	Poetry In America	50,000
Young Chicago Authors 1180 N Milwaukee Ave Chicago, IL 60642	None	PC	Teaching Artists Corps Program Support	40,000
Alice E Notley 21 rue des Messageries Paris 75010 FR	None	NC	Ruth Lilly Poetry Prize	100,000
Amy Newman 810 Lawnwood Ave DeKalb, IL 60115	None	NC	The Friends of Literature Prize	500
Beth Loffreda 406 South 13th St Laramie, WY 82070	None	NC	Pegasus Award for Criticism Finalist	500
CBR Arts LLC 453 Stanford Dr Claremont, CA 91711	None	NC	Pegasus Award for Poetry Criticism Finalist	500
Danniel Schoonebeek 723 Gifford Hill Rd Oneonta, NY 13820	None	NC	Ruth Lilly Fellowship	25,800
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Erika Sanchez 3147 S May St Chicago, IL 60608	None	NC	Ruth Lilly Fellowship	25,800
Jacqueline Woodson Inc 376 5th St Brooklyn, NY 11215	None	NC	Young People's Poet Laureate	25,000
James Longenbach 1685 Highland Ave Rochester, NY 14618	None	NC	Pegasus Award for Criticism	1,000
Jamila A Woods 909 W 19th Pl Apt B Chicago, IL 60608	None	NC	Ruth Lilly Fellowship	25,800
Jenny Zhang 67-50 Burns St Forest Hills, NY 11375	None	NC	Editors Prize for Feature Article	1,000
Jillian Weise 210 Ashley Ave Greenville, SC 29609	None	NC	J Howard and Barbara M J Wood Prize	5,000
Khaled Mattawa 1348 Ardmoor Avenue Ann Arbor, MI 48103	None	NC	Pegasus Award for Criticism Finalist	1,000
Langdon Hammer 167 Armory St Hamden, CT 06517	None	NC	Pegasus Award for Poetry Criticism Finalist	1,000
Mark Ford 9 Statham Grove London N16 9DP UK	None	NC	Pegasus Award for Poetry Criticism	7,500
Mary Rae Armantrout 4774 E Mountain View Dr San Diego, CA 92116	None	NC	Levinson Prize	500
Maya C Popa 46 E 91 St Apt 3C New York, NY 10128	None	NC	Editors Prize for Reviewing	1,000
Michael Hofmann Koppel 32 Hamburg 20099 GM	None	NC	Pegasus Award for Criticism Finalist	1,000
Mindy Zhang 13020 Jolette Ave Granada Hills, CA 91344	None	NC	John Frederick Nims Memorial Prize for Translation	500
Nathaniel Marshall 402 S Washington S Apt 2 Crawfordsville, IN 47933	None	NC	Ruth Lilly Fellowship	25,800
Pierre Joris 7101 Shore Rd 2J Brooklyn, NY 11209	None	NC	Pegasus Award for Criticism Finalist	1,000
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Safiya J Sinclair 24 Pearl St Provincetown,MA 02657	None	NC	Ruth Lilly Fellowship	25,800
Tarfia Faizullah 10000 Dequindre Street Hamtramck,MI 48212	None	NC	Frederick Bock Prize	500
Terrance Hayes 5545 Avondale Place Pittsburgh,PA 15206	None	NC	Bess Hokin Prize	1,000
Eugene D Richie 67 Edgewood Rd Port Washington,NY 11050	None	NC	Pegasus Award for Criticism	500
Roseanne Wasserman 67 Edgewood Rd Port Washington,NY 11050	None	NC	Pegasus Award for Criticism	500
Peter O'Leary 1318 S Oak Park Ave Berwyn,IL 60402	None	NC	Pegasus Award for Criticism	1,000
Aaron Preston 309 Pennwyn Pl Reading,PA 19607	None	NC	Recitation Prize	100
Abigail Thompson 2446 N 47th St Milwaukee,WI 53210	None	NC	Recitation Prize	100
Academy of Arts and Academics 615 Main St Springfield,OR 97477	None	NC	Grant for Book Purchase	500
Ahkei Togun 5711 Fairford Lane Virginia Beach,VA 23464	None	NC	Recitation Prize	200
Ahkei Togun 5711 Fairford Lane Virginia Beach,VA 23464	None	NC	Recitation Prize	1,000
Alesha Hurst PO Box 327 Fountain Green,UT 84632	None	NC	Recitation Prize	100
Alex Hanesworth 8605 Southridge Pl Anacortes,WA 98221	None	NC	Recitation Prize	200
Alex Schumacher 5312 E 28th St Sioux Falls,SD 57110	None	NC	Recitation Prize	100
Alexis Danielle Granville 6180 Rose St Zachary,LA 70791	None	NC	Recitation Prize	100
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Alyssa Moncure 12603 Granada Rd Leawood,KS 66209	None	NC	Recitation Prize	100
Amanda Pohlman 9328 Margo Circle La Vista,NE 68128	None	NC	Recitation Prize	200
Anacortes High School 1600 20th St Anacortes,WA 98221	None	NC	Grant for Book Purchase	500
Anna Julia Cooper Episcopal School 2124 N 29th St Richmond,VA 23223	None	NC	Grant for Book Purchase	200
Annabelle Emuze 2324 South Willemore Ave Springfield,IL 62704	None	NC	Recitation Prize	200
Antilles School 7280 Frenchmans Bay 16-1 St Thomas,VI 00802	None	NC	Grant for Book Purchase	500
Ari Dalbert 84-744 Moua St Waianae,HI 96792	None	NC	Recitation Prize	200
Ari Dalbert 84-744 Moua St Waianae,HI 96792	None	NC	Recitation Prize	1,000
ArvadaClearmont Sheridan County School District 3 Clearmont,WY 82835	None	NC	Grant for Book Purchase	500
Ashley Brage 2903 4th Ave NW Watertown,SD 57201	None	NC	Recitation Prize	200
Barrington Christian Academy 9 Old Country Road Barrington,RI 02806	None	NC	Grant for Book Purchase	200
Battle Ground Academy 336 Ernest Rice Ln Franklin,TN 37069	None	NC	Grant for Book Purchase	500
Baxter Murrell 415 Raintree Ct Winter Park,FL 32789	None	NC	Recitation Prize	200
Beatrice C Dimaculangan 30 Archbridge Lane Springfield,NJ 07081	None	NC	Recitation Prize	200
Bell Academy Homeschool 2311 The Peaks Blvd Rogers,AR 72758	None	NC	Grant for Book Purchase	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bellows Free Academy 71 South Main Street St Albans, VT 05452	None	NC	Grant for Book Purchase	500
Ben Cohen 75 Peacedale Rd Needham, MA 02492	None	NC	Recitation Prize	100
Ben Franklin High School 2001 Leon C Simon Dr New Orleans, LA 70122	None	NC	Grant for Book Purchase	200
Bethany High School 4500 N Mueller Bethany, OK 73008	None	NC	Grant for Book Purchase	500
Blessed Sheriff 19932 Tygart Ln Gaithersburg, MD 20879	None	NC	Recitation Prize	100
Box Elder High School 380 S 600 W Brigham City, UT 84302	None	NC	Grant for Book Purchase	500
Brighton High School 1150 Winton Rd S Rochester, NY 14618	None	NC	Grant for Book Purchase	500
Burwell Public Schools 190 I St Box 670 Burwell, NE 68823	None	NC	Grant for Book Purchase	200
Cacia Leighann Rose 24 Westchester Dr Winchester, KY 40391	None	NC	Recitation Prize	100
Cal Thomas Kreiner 10321 Leland Dr Greenville, MI 48838	None	NC	Recitation Prize	100
Cameron Downey 1205 Thomas Ave N Minneapolis, MN 55411	None	NC	Recitation Prize	200
Capital High School MT 100 Valley Dr Helena, MT 59601	None	NC	Grant for Book Purchase	200
Carol Pollard 109 West Cheryl St Osceola, AR 72370	None	NC	Recitation Prize	200
Caroline Sprague PO Box 898 Stockbridge, MA 01262	None	NC	Recitation Prize	200
Carys Snyder 109 Mimosa Dr Starkville, MS 39759	None	NC	Recitation Prize	100
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Casey Ryan Goggin 36 Kilbride Dr Pinehurst, NC 28374	None	NC	Recitation Prize	200
Casey Ryan Goggin 36 Kilbride Dr Pinehurst, NC 28374	None	NC	Recitation Prize	5,000
Centennial High School - Columbus Ohio 1441 Bethel Road Columbus, OH 43220	None	NC	Grant for Book Purchase	200
Cheyenne A Schultz PO Box 824 Victor, ID 83455	None	NC	Recitation Prize	200
College of Southern Nevada High School 6375 W Charleston Blvd WHM Las Vegas, NV 89146	None	NC	Grant for Book Purchase	200
Coral Brantly 3130 Maple Ridge Rd Petoskey, MI 49770	None	NC	Recitation Prize	200
Dakota Scarlet Green 4134 Clarendon Bel Aire, KS 67220	None	NC	Recitation Prize	100
Dessaline Etienne 17 Oakwood Circle 3 Goffstown, NH 03045	None	NC	Recitation Prize	200
Diana Mildred James 3125 Alabama Ave SE Washington, DC 20020	None	NC	Recitation Prize	200
Dominique Groffman 1682 Sunshine Rd Minden, NV 89423	None	NC	Recitation Prize	200
Douglas High School 1670 Hwy 88 Minden, NV 89423	None	NC	Grant for Book Purchase	500
Dylan Baker 8380 Los Monteros St Las Vegas, NV 89129	None	NC	Recitation Prize	100
Dylan Collins 9 Lower Powder River Rd Arvada, WY 82831	None	NC	Recitation Prize	200
EO Smith High School 1235 Storrs Rd Storrs, CT 06268	None	NC	Grant for Book Purchase	500
Eastern Greene High School 11064 E State Rd 54 Bloomfield, IN 47424	None	NC	Grant for Book Purchase	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Edson A Alvarado Fierro 509 Kingston Pl Yukon,OK 73099	None	NC	Recitation Prize	200
Ella Werner 21 Carriage Road Freeport,ME 04032	None	NC	Recitation Prize	100
Ellen Podhajsky 709 West Linn St Marshalltown,IA 50158	None	NC	Recitation Prize	100
Elliot G Davidson 712 Buffalo Rd Lewisburg,PA 17837	None	NC	Recitation Prize	200
Emily Williams PO Box 445 Manchester,VT 05254	None	NC	Recitation Prize	100
Emma Libersky 12548 Hillside Dr Plymouth,IN 46563	None	NC	Recitation Prize	200
Emma Libersky 12548 Hillside Dr Plymouth,IN 46563	None	NC	Recitation Prize	1,000
Emma Sawyer PO Box 164 Buruell,NE 68823	None	NC	Recitation Prize	100
Esc Sup Tech Manuel Mediavilla Negron PO Box 8930 Humacao 00791 RQ	None	NC	Grant for Book Purchase	500
Faiza Abubakar 3547 Emerson Ave N Minneapolis,MN 55412	None	NC	Recitation Prize	100
Falyn Lazarus 11490 Butter Rd Grass Valley,CA 95945	None	NC	Recitation Prize	100
Gabriella Sipe 2523 Cedar Park Loop Olympia,WA 98501	None	NC	Recitation Prize	100
George Rogers Clark High School 2745 Boonesboro Rd Winchester,KY 40391	None	NC	Grant for Book Purchase	200
Goffstown High School 27 Wallace Rd Goffstown,NH 03045	None	NC	Grant for Book Purchase	500
Grace Anderson 1945 N Mohawk Chicago,IL 60614	None	NC	Recitation Prize	100
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Grace Catherine Whitten 4092 Indian Hills Rd Columbia,TN 38401	None	NC	Recitation Prize	200
Grand Prairie High School 101 High School Drive Grand Prairie,TX 75050	None	NC	Grant for Book Purchase	200
Grant County High School 715 Warsaw Rd Dry Ridge,KY 41035	None	NC	Grant for Book Purchase	500
Greenbrier East High School 1 Spartan Ln Lewisburg,WV 24901	None	NC	Grant for Book Purchase	500
Gypsy Prince 1149 J St Springfield,OR 97477	None	NC	Recitation Prize	200
Haley Bryan 13 Wilorn Dr Dry Ridge,KY 41035	None	NC	Recitation Prize	200
Hannah Sturgis 560 Dairy Dr Smyrna,DE 19977	None	NC	Recitation Prize	200
Holt High School 600 Campus Dr Wentzville,MO 63385	None	NC	Grant for Book Purchase	500
Holy Spirit Catholic High School 601 James I Harrison Jr Pkwy E Tuscaloosa,AL 35405	None	NC	Grant for Book Purchase	500
Ian H Walls 2587 N Oakland Ave Milwaukee,WI 53211	None	NC	Recitation Prize	1,000
Ian H Walls 2587 N Oakland Ave Milwaukee,WI 53211	None	NC	Recitation Prize	200
Isabella Bello Rivera PO Box 2343 Guayama 785 RQ	None	NC	Recitation Prize	100
Jalen A Bell 2311 The Peaks Blvd Rogers,AR 72758	None	NC	Recitation Prize	100
Jeana Lovett 5114 Herndon Cir Colorado Springs,CO 80920	None	NC	Recitation Prize	200
Jillian Miley 76 Raintree Dr Port Orange,FL 32127	None	NC	Recitation Prize	100
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jonathan Dayton High School 139 Mountain Ave Springfield, NJ 07081	None	NC	Grant for Book Purchase	500
Jonathan Qualls PO Box 308415 St Thomas 803 VQ	None	NC	Recitation Prize	200
Jordan Klein 44-591 Kaneohe Bay Dr Kaneohe, HI 96744	None	NC	Recitation Prize	100
Joseph Belcher 2913 Spartacus Dr Grand Prairie, TX 75052	None	NC	Recitation Prize	100
Joshua Mugabe 339 Twin Lakes Rd Rock Hill, SC 29732	None	NC	Recitation Prize	200
Josie Kasik 2251 Barker Ave Sergeant Bluff, IA 51054	None	NC	Recitation Prize	200
Joy Carino 600 Cruise St Starkville, MS 39759	None	NC	Recitation Prize	200
Juan A Oseguera 1316 Whispering Hill Ada, OK 74820	None	NC	Recitation Prize	100
Junia Washington PO Box 10806 St Thomas 00801-3806 VQ	None	NC	Recitation Prize	100
Kate Goorland 32 Shellburne Dr Wilmington, DE 19803	None	NC	Recitation Prize	100
Kelsey Anderson 2411 Old Clifty Rd Bloomfield, IN 47424	None	NC	Recitation Prize	100
Keystone School 119 E Craig Pl San Antonio, TX 78212	None	NC	Grant for Book Purchase	500
Keystone School 119 E Craig Pl San Antonio, TX 78212	None	NC	Grant for Book Purchase	500
Kyla Bates 6125 Cedar Pointe Blvd Baton Rouge, LA 70812	None	NC	Recitation Prize	200
Kyle Fox Shreve 5018 Saint Simon Ct Frederick, MD 21703	None	NC	Recitation Prize	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
La Cueva High School 7801 Wilshire Ave NE Albuquerque, NM 87122	None	NC	Grant for Book Purchase	200
Leanne Noelle Chun 1438 E Haven Lane Olathe, KS 66062	None	NC	Recitation Prize	200
Leanne Noelle Chun 1438 E Haven Lane Olathe, KS 66062	None	NC	Recitation Prize	1,000
Lena Blackmon 16965 S Orchid Flower Trail Vail, AZ 85641	None	NC	Recitation Prize	100
Levi Lowe 18171 6th Ave Jamestown, CA 95327	None	NC	Recitation Prize	200
Levi Lowe 18171 6th Ave Jamestown, CA 95327	None	NC	Recitation Prize	1,000
Lewisburg Area High School 815 Market St Lewisburg, PA 17837	None	NC	Grant for Book Purchase	500
Liam McKenna 28 Waterbury St Apt A Saratoga Springs, NY 12866	None	NC	Recitation Prize	100
Liberty High School CO 8720 Scarborough Dr Colorado Springs, CO 80920	None	NC	Grant for Book Purchase	500
Maeva Ordaz 806 W 57th Ave Anchorage, AK 99518	None	NC	Recitation Prize	200
Maeva Ordaz 806 W 57th Ave Anchorage, AK 99518	None	NC	Recitation Prize	20,000
Magic City Campus 1100 11th Ave SW Minot, ND 58701	None	NC	Grant for Book Purchase	500
Mahwah High School 50 Ridge Rd Mahwah, NJ 07430	None	NC	Grant for Book Purchase	200
Marissa Corleone 1569 Forrest Ave Memphis, TN 38112	None	NC	Recitation Prize	100
Marshalltown High School 1602 S 2nd Ave Marshalltown, IA 50158	None	NC	Grant for Book Purchase	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Maya Bryant 52 Old Jamestown Ct Wentzville,MO 63385	None	NC	Recitation Prize	200
Mekiah Hall 257 Shadow Ct Huntsville,AL 35824	None	NC	Recitation Prize	100
Michelle Zhou 9500 Peralta Rd NE Albuquerque,NM 87109	None	NC	Recitation Prize	100
Milwaukee High School of the Arts 2300 W Highland Ave Milwaukee,WI 53233	None	NC	Grant for Book Purchase	500
Milwaukee High School of the Arts 2300 W Highland Ave Milwaukee,WI 53233	None	NC	Grant for Book Purchase	500
Milwaukee High School of the Arts 2300 W Highland Ave Milwaukee,WI 53233	None	NC	Grant for Book Purchase	200
Mississippi School for Math and Science 1100 College St MVW-1627 Columbus,MS 39701	None	NC	Grant for Book Purchase	500
Monument Mountain Regional High School 600 Stockbridge Rd Great Barrington,MA 01230	None	NC	Grant for Book Purchase	500
Morgan Alexandria Futrell-McMillan 1310 Grandiflora Dr Leland,NC 28451	None	NC	Recitation Prize	100
Mt Ararat High School 73 Eagles Way Topsham,ME 04086	None	NC	Grant for Book Purchase	500
Needham High School 609 Webster St Needham Heights,MA 02494	None	NC	Grant for Book Purchase	200
Neely Seams 410 Hahn St Lewisburg,WV 24901	None	NC	Recitation Prize	200
Nevada Union High School 11761 Ridge Rd Crass Valley,CA 95945	None	NC	Grant for Book Purchase	200
New Century Technology High School 2500 Meridian St Huntsville,AL 35811	None	NC	Grant for Book Purchase	200
Nichola Metzger 206 Oakdale Dr Rochester,NY 14618	None	NC	Recitation Prize	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Nicole Louw 4111 Midway Ln Tuscaloosa,AL 35406	None	NC	Recitation Prize	200
Nora Doyle 408 Hunt Rd Bridgewater,NH 03222	None	NC	Recitation Prize	100
North Sanpete High School c/o Ben Cox Mt Pleasant,UT 84647	None	NC	Grant for Book Purchase	200
Northeast Magnet High School 5550 N Lycee Bel Aire,KS 67226	None	NC	Grant for Book Purchase	200
Northern Cass School 16021 18th St SE Hunter,ND 58048	None	NC	Grant for Book Purchase	200
Notre Dame de Sion 10631 Wornell Rd Kansas City,MO 64114	None	NC	Grant for Book Purchase	200
Olathe South High School 1640 E 151st St Olathe,KS 66062	None	NC	Grant for Book Purchase	500
Olathe South High School 1640 E 151st St Olathe,KS 66062	None	NC	Grant for Book Purchase	500
Olympia High School 1302 North Street Olympia,WA 98501	None	NC	Grant for Book Purchase	200
Owen Elphick 470 South Eagleville Rd Storrs,CT 06268	None	NC	Recitation Prize	200
Owen Elphick 470 South Eagleville Rd Storrs,CT 06268	None	NC	Recitation Prize	1,000
Paris Stroud 463 Camden Woods Dr Dallas,GA 30157	None	NC	Recitation Prize	200
Paris Stroud 463 Camden Woods Dr Dallas,GA 30157	None	NC	Recitation Prize	10,000
Paulding County High School 1297 Villa Rica Hwy Dallas,GA 30157	None	NC	Grant for Book Purchase	500
Petoskey High School 1500 Hill St Petoskey,MI 49770	None	NC	Grant for Book Purchase	500
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Pinecrest High School 250 Voit Gilmore Lane Southern Pines, NC 28387	None	NC	Grant for Book Purchase	500
Pinecrest High School 250 Voit Gilmore Lane Southern Pines, NC 28387	None	NC	Grant for Book Purchase	500
Plymouth High School 1 Big Red Drive Plymouth, IN 46563	None	NC	Grant for Book Purchase	500
Plymouth High School 1 Big Red Drive Plymouth, IN 46563	None	NC	Grant for Book Purchase	500
Plymouth Regional High School 86 Old Ward Bridge Rd Plymouth, NH 03264	None	NC	Grant for Book Purchase	200
Polytech High School 823 Walnut Shade Rd Woodside, DE 19980	None	NC	Grant for Book Purchase	500
Portsmouth Abbey School 285 Corys Ln Portsmouth, RI 02871	None	NC	Grant for Book Purchase	500
Rachel Patty 448 Sugarite Ave Raton, NM 87740	None	NC	Recitation Prize	200
Raton High School 1535 Tiger Circle Raton, NM 87740	None	NC	Grant for Book Purchase	500
Reading High School 801 North 13th Street Reading, PA 19604	None	NC	Grant for Book Purchase	200
Rebecca Dulaney 324 State Highway III Lot 2 Aladdin, WY 82710	None	NC	Recitation Prize	100
Renee Weisz 9 Old Hill Farms Rd Westport, CT 06880	None	NC	Recitation Prize	100
Richard Montgomery High School 250 Richard Montgomery Drive Rockville, MD 20852	None	NC	Grant for Book Purchase	200
Riley Knowles 1810 Carnage Way West Linn, OR 97068	None	NC	Recitation Prize	100
Roberto St Claudio Montes Urb Villas de Buenaventura 340 Yabucoa 767 RQ	None	NC	Recitation Prize	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Rose Horowitz 75 Ash Cove Rd Harpwell, ME 04079	None	NC	Recitation Prize	200
Ryan Montes 4206 Woodberry St University Park, MD 20782	None	NC	Recitation Prize	100
Sadie Belle Merkley 4278 Corinne Cutoff Corinne, UT 84307	None	NC	Recitation Prize	200
Sam Terry 9231 Bingham San Antonio, TX 78230	None	NC	Recitation Prize	200
Samara Huggins 5440 Trumpet Vine Trail Mableton, GA 30126	None	NC	Recitation Prize	100
Samuel Boudreau 2 Sams Lane Swanton, VT 05488	None	NC	Recitation Prize	200
Samuel Buckley Terry 9231 Bingham San Antonio, TX 78230	None	NC	Recitation Prize	1,000
Sara Zoat 6 Degraaf Ct Suite 420 Mahwah, NJ 07430	None	NC	Recitation Prize	100
Sarah G Binau 365 N Cassingham Rd Columbus, OH 43209	None	NC	Recitation Prize	200
Sarah G Binau 365 N Cassingham Rd Columbus, OH 43209	None	NC	Recitation Prize	1,000
Saratoga Springs High School 3 Blue Streak Blvd New York, NY 12866	None	NC	Grant for Book Purchase	200
Skutt Catholic High School 3131 S 156th Street Omaha, NE 68130	None	NC	Grant for Book Purchase	500
Sonora High School 100 School St Sonora, CA 95370	None	NC	Grant for Book Purchase	500
Sonora High School 100 School St Sonora, CA 95370	None	NC	Grant for Book Purchase	500
Spartanburg Day School 1701 Skylyn Dr Spartanburg, SC 29307	None	NC	Grant for Book Purchase	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Springfield Southeast High School 2350 East Ash St Springfield, IL 62703	None	NC	Grant for Book Purchase	500
Spruce Creek High School 801 Taylor Rd Port Orange, FL 32127	None	NC	Grant for Book Purchase	200
St Anselm's Abbey School 4501 S Dakota Ave NE Washington, DC 20017	None	NC	Grant for Book Purchase	200
St George's Independent School 1880 Wolf River Blvd Collierville, TN 38017	None	NC	Grant for Book Purchase	200
Staples High School 70 North Ave Westport, CT 06880	None	NC	Grant for Book Purchase	200
Starkville High School 603 Yellow Jacket Dr Starkville, MS 39759	None	NC	Grant for Book Purchase	200
Sundance Secondary School Attn Mason Neiman Sundance, WY 82729	None	NC	Grant for Book Purchase	200
Sunny Ridge 4-H 9469 S Powerline Rd Nampa, ID 83686	None	NC	Grant for Book Purchase	200
Tallwood High School 1668 Kempsville Rd Virginia Beach, VA 23464	None	NC	Grant for Book Purchase	500
Tamie Montagne 322 Ashwick Court Spartanburg, SC 29301	None	NC	Recitation Prize	100
TaShaiya Henderson 4600 E 197th Pl Thornton, CO 80233	None	NC	Recitation Prize	100
Taylor Blossom 905 Lodestar Rd Helena, MT 59602	None	NC	Recitation Prize	100
Taylor Rogers 118 W Alder St Apt 305 Missoula, MT 59802	None	NC	Recitation Prize	200
Teton High School 555 Ross Ave Driggs, ID 83422	None	NC	Grant for Book Purchase	500
The Blake School 511 Kenwood Parkway Minneapolis, MN 55403	None	NC	Grant for Book Purchase	500
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Thornton High School 9351 N Washington St Thornton, CO 80229	None	NC	Grant for Book Purchase	200
Trinity Christian School 875 Auloa Rd Kailua, HI 96734	None	NC	Grant for Book Purchase	200
Tyler A Ray 1147 Price Run Rd Webster Springs, WV 26288	None	NC	Recitation Prize	100
University High School Arizona 421 N Arcadia Ave Tucson, AZ 85716	None	NC	Grant for Book Purchase	200
University of Chicago Lab High School 1362 E 59th St Chicago, IL 60637	None	NC	Grant for Book Purchase	200
Ursuline Academy 1106 Pennsylvania Ave Wilmington, DE 19806	None	NC	Grant for Book Purchase	200
VI Montessori School Inc 6936 Vessup Ln St Thomas 802 VQ	None	NC	Grant for Book Purchase	200
Victoria Moloney 742 C Broadway St Eielson AFB, AK 99702	None	NC	Recitation Prize	100
Virginia Harness 9469 S Powerline Rd Nampa, ID 83686	None	NC	Recitation Prize	100
Waianae High School 85-251 Farrington Hwy Waianae, HI 96792	None	NC	Grant for Book Purchase	500
Washington High School 501 N Sycamore Sioux Falls, SD 57110	None	NC	Grant for Book Purchase	200
Watertown High School Box 730 Watertown, SD 57201	None	NC	Grant for Book Purchase	500
West Anchorage High School 1700 Hillcrest Dr Anchorage, AK 99517	None	NC	Grant for Book Purchase	500
West Anchorage High School 1700 Hillcrest Dr Anchorage, AK 99517	None	NC	Grant for Book Purchase	500
West Linn High School 5464 West A St West Linn, OR 97068	None	NC	Grant for Book Purchase	200
Total ▶ 3a				1,203,100

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Whitefield Academy 1 Whitefield Dr Mableton,GA 30126	None	NC	Grant for Book Purchase	200
Willard Alternative High 901 South 6th West Missoula,MT 59801	None	NC	Grant for Book Purchase	500
Winter Park High School 2100 Summerfield Rd WInter Park,FL 32792	None	NC	Grant for Book Purchase	500
Yarmouth High School 286 West Elm St Yarmouth,ME 04096	None	NC	Grant for Book Purchase	200
Yesenia Rego 145 Campbell Ave East Providence,RI 02916	None	NC	Recitation Prize	100
York Preparatory Academy 1047 Golden Gate Ct Rock Hill,SC 29732	None	NC	Grant for Book Purchase	500
Zach Howatt 602 Lynn Dawn Dr Argusville,ND 58005	None	NC	Recitation Prize	100
Zachary High School 4100 Bronco Lane Zachary,LA 70791	None	NC	Grant for Book Purchase	500
Zaskia Villa 487 Alondra Ct Rio Rico,AZ 85648	None	NC	Recitation Prize	200
Zoe Butler 168 Cottontail Dr Portsmouth,RI 02871	None	NC	Recitation Prize	200
Total ▶ 3a				1,203,100

TY 2015 Accounting Fees Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	79,627	7,963	7,963	73,664

TY 2015 All Other Program Related Investments Schedule

Name: The Poetry Foundation
EIN: 36-2490808

Category	Amount
NONE	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Depreciation Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Expenditure Responsibility Statement

Name: The Poetry Foundation

EIN: 36-2490808

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
Ecrivains En Bord De Mer	61 rue Amiral du chaffault Nantes, Paris 44100 FR	2015-07-14	6,600	General Support of Poetry Programs	6,600	YES	8/14/2015	2015-08-14	Upon verification the grant was used for the intended purposes and helped support chantable programs including a writers meeting that included renowned poets

TY 2015 General Explanation Attachment**Name:** The Poetry Foundation**EIN:** 36-2490808

Identifier	Return Reference	Explanation
Building, land and equipment schedule-Noninvestment	BUILDING, LAND AND EQUIPMENT SCHEDULE - NONINVESTMENT	PART I, LINE 19 Description Date Cost Accum Method Life Total Acquired Basis Depre Depre Depre Exp Land Var \$ 7,263,478 NONE NONE NONE NONE Building Var \$15,041,366 \$2,498,684 NONE NONE \$506,615 Equipment VAR \$ 428,010 \$ 394,126 S-L VAR \$ 40,527 Other VAR \$ 2,504,897 \$1,482,285 S-L VAR \$220,712 TOTAL \$25,237,751 \$4,375,095 \$767,854

Identifier	Return Reference	Explanation
Building, Land and Equipment Schedule- Non Investment	Building Land and Equipment Schedule- Noninvestment	Part II, Line 14 Description Cost Accum Net Book Value Basis Depre Land \$ 7,263,478 NONE \$ 7,263,478 Building \$15,041,366 \$2,498,684 \$12,542,682 Equipment \$ 428,010 \$ 394,126 \$ 33,884 Other \$ 2,504,897 \$1,482,285 \$ 1,022,612 TOTAL \$25,237,751 \$4,375,095 \$20,862,656

Identifier	Return Reference	Explanation
Educational and public programs and prizes	Educational and public programs and prizes	Form 990-PF, Part IX-A "Educational and Public Programs and Prizes" - Total Expense \$2,803,799 The Foundation offers a wide array of programs to the public to expand the audience for poetry In June 2011, the Foundation increased in person program activity with the opening of its new building More than half of the 22,000 square foot space is open to the public including a poetry library, exhibition space and performance space designed specifically for the spoken word The Librarys 2015 activities made nearly 30,000 books of poetry and about poetry available to the public The Foundation presented poetry programming, in person to 4,500 in its new building and several other venues The Library and Exhibition space welcomed over 3,000 visitors on non-event days Student and children field trips were expanded in 2015 The Foundation partnered with other cultural institutions in Chicago in order to broaden its own audience, but also provide a free resource for unique and creative public programming The Foundation charges no admission Other areas of public poetry programming are still conducted outside of the new building These include youth and childrens poetry activities, public radio and television poetry programming, research in special interest areas of poetry and prizes and awards for excellence in poetry Poetry Out Loud, a national program of poetry recitation in high schools completed its 9th year Working with the National Endowment for the Arts, the Foundations program encourages high school students to memorize and perform great poems helping students to master public speaking skills, build self-confidence, and learn about their literary heritage The 2015/2016 program included over 365,000 students from across the country The Foundations programs offered through the media (TV, Radio and Print) reached over 20 million The Foundation continued its major prize and recognition programs including the Lilly Prize and expanded Lilly Rosenberg Fellow ships

Identifier	Return Reference	Explanation
Poetryfoundation org	Poetryfoundation org	Form 990-PF, Part IX-A "Poetryfoundation org" - \$2,381,512 The Foundation has established a major presence with its comprehensive offering of digital programs Poetryfoundation org is a free source for news, reading lists, archives of selected works of poetry, study aids, and other resources In 2015, the Foundation embarked on a rebuild of its content management system to support the exponential growth of traffic to the site, as well as, accommodate new technology going forward The work on the site will be completed in 2016 The Foundations Poetry Tool provided public access to over 13,000 poems The web site also supports POETRY magazine and other Foundation programs The Foundation utilizes the website to develop new audiences for poetry through quality content and innovative programming that reaches out to users from children to seniors, casual readers to serious students of poetry The web site had 36 million unique visitors, a 20% increase over 2014 It had over 125 million page views for the year Free downloads of audio and video programming are also offered The Foundation has won a number of awards for its web site and smart phone applications Additionally, free poetry videos are offered for both adult and childrens poetry users

Identifier	Return Reference	Explanation
Poetry Magazine	Poetry Magazine	Form 990-PF, Part IX-A "POETRY magazine" - \$1,000,476 (Expense is net of program revenue of \$622,000) Established in 1912, POETRY magazine continues to present not only the best new poetry written by distinguished poets, but works to discover and present emerging, new and undiscovered writers. The magazine also focuses on current issues relating to poetry in the culture, as well as presenting critical exchanges, debates, reviews, and special features. The magazine receives and reads over 100,000 submissions of poetry for its 11 issues published annually. Circulation was over 23,000 in December 2015. In addition to the print edition, a complete archival and current edition of the magazine is offered on the web as well as a digital subscription. The magazine is made available for free on the Foundation website.

TY 2015 Investments Corporate Bonds Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MUTUAL FUND BONDS	46,763,041	46,763,041

TY 2015 Investments Corporate Stock Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DOMESTIC EQUITIES	88,677,603	88,677,603
INTERNATIONAL EQUITIES	36,456,042	36,456,042

TY 2015 Investments - Other Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
PRIVATE EQUITY	FMV	16,307,688	16,307,688
REAL ESTATE	FMV	12,413,594	12,413,594
NATURAL RESOURCES	FMV	726,246	726,246
CREDIT FUND	FMV	2,608,861	2,608,861

TY 2015 Legal Fees Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	203,639	17,345	17,345	191,366

TY 2015 Mortgages and Notes Payable Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Total Mortgage Amount:** 13,870,000

Item No.	1
Lender's Name	VARIOUS PUBLICALLY ISSUED BONDS
Lender's Title	
Relationship to Insider	
Original Amount of Loan	15,000,000
Balance Due	13,870,000
Date of Note	2010-04
Maturity Date	
Repayment Terms	PRINCIPAL AND INTEREST PAYABLE 1/1 & 7/1 EACH YEAR
Interest Rate	
Security Provided by Borrower	FIXED RATE REVENUE BONDS
Purpose of Loan	FOR THE PURCHASE AND CONSTRUCTION OF NEW BUILDING
Description of Lender Consideration	CASH APPROXIMATELY \$14.9 MILLION
Consideration FMV	

TY 2015 Other Assets Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
LILLY TRUSTS-BENEFICIAL INT	14,435,964	8,512,522	8,512,522
BOND ISSUANCE COST, NET	377,612	342,212	342,212

TY 2015 Other Decreases Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Description	Amount
CHANGE IN BENEFICIAL INT. IN LILLY TRUST	106,000
UNREALIZED LOSS ON INVESTMENTS	5,229,602
INCOME/LOSS TIMING ADJUSTMENTS FROM LP	496,680

TY 2015 Other Expenses Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EQUIPMENT RENTAL & MAINTENANCE	6,953			6,953
ADVERTISING	222,326		153,318	110,688
OFFICE SUPPLIES	33,634	520	520	34,126
TELEPHONE	3,526	83	83	3,507
POSTAGE AND MESSENGER	22,151	2	2	24,404
BOOKS/CDS	14,501			15,516
COMPUTER WEBSITE MAINTENANCE	217,854	2,400	2,400	242,661
OFFICE INSURANCE	68,336	1,662	1,662	67,683
AUDIO & VIDEO RECORDING	6,946			6,946
BAD DEBT	2,452			2,452
BANK & INV FEES	167,030	138,915	138,915	31,617
DUES/MEMBERSHIP	34,054			34,044
RECRUITMENT	161,489			161,489
OTHER EXPENSES FROM LP	249,456	249,456	249,456	
GENERAL & ADMINISTRATIVE	22,009			11,104

TY 2015 Other Income Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Earned Subscription Income	511,921		511,921
Single Copy Sale Income	23,114		23,114
Distributor Gross Sales	59,118		59,118
Advertising Income	24,462		24,462
Royalty Revenue from Poetry Publications	18,142	18,142	
Miscellaneous Income	44,310	30,467	13,842
Income from LP Investments	205,057	205,057	
Excluded Income from Unrelated Business		-7,582	

TY 2015 Other Liabilities Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Description	Beginning of Year - Book Value	End of Year - Book Value
OTHER LIABILITIES		

TY 2015 Other Professional Fees Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTANTS-OTHER	258,364			258,775
CONSULTANTS-EDITORIAL	71,705			78,325
CONSULTANTS-AUDIO	99,694			107,941
CONSULTANTS-ADVERTISING	41,268			40,918
CONSULTANTS-VIDEO	27,820			27,320
READER/JUDGE	37,800			38,175
SPEAKER/PERFORMERS	133,633			132,033
INVESTMENT ADVISOR FEES	69,250	69,250	69,250	

TY 2015 Taxes Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SOCIAL SECURITY/MEDICARE	137,099	4,876	4,876	132,223
TAX EXPENSE	86,053	86,053	86,053	52,595

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990

OMB No 1545-0047

2015

Name of the organization The Poetry Foundation	Employer identification number 36-2490808
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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 foundation

Check 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 other 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 33¹/₃% 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 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization The Poetry Foundation	Employer identification number 36-2490808
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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		\$ 25,000	Person ☒
	Richard Kiphart		Payroll ☐
	222 West Adams Street		Noncash ☐
	Chicago, IL 60606		(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2		\$ 13,642	Person ☒
	Mid-Atlantic Art Foundation		Payroll ☐
	201 North Charles Street Suite 401		Noncash ☐
	Baltimore, MD 21201		(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)

Name of organization The Poetry Foundation	Employer identification number 36-2490808
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization The Poetry Foundation	Employer identification number 36-2490808
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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 information once. See instructions.) ► \$ _____

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	
	--			
(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		
--				
(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		
--				
(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		
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