

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93491314012747			
Form 990-PF		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 instructions is at www.irs.gov/form990pf .			OMB No 1545-0052		
Department of the Treasury Internal Revenue Service					2016		
					Open to Public Inspection		
For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016							
Name of foundation The Poetry Foundation				A Employer identification number 36-2490808			
Number and street (or P O box number if mail is not delivered to street address) 61 West Superior St			Room/suite	B Telephone number (see instructions) (312) 799-8001			
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 ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) ▶ \$ 246,339,257		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐			
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))				(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	198,511				
	2	Check ▶ ☐ if the foundation is not required to attach Sch B					
	3	Interest on savings and temporary cash investments	154	154	154		
	4	Dividends and interest from securities	5,380,901	5,380,901	5,380,901		
	5a	Gross rents					
	b	Net rental income or (loss) _____					
	6a	Net gain or (loss) from sale of assets not on line 10	3,243,048				
	b	Gross sales price for all assets on line 6a 12,395,679					
	7	Capital gain net income (from Part IV, line 2)		3,241,129			
	8	Net short-term capital gain			0		
	9	Income modifications					
	10a	Gross sales less returns and allowances 0					
b	Less Cost of goods sold 0						
c	Gross profit or (loss) (attach schedule)	0					
11	Other income (attach schedule)	843,823	355,235	924,045			
12	Total. Add lines 1 through 11	9,666,437	8,977,419	6,305,100			
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	532,842	33,023	33,023	499,818	
	14	Other employee salaries and wages	1,501,064	12,068	70,752	1,431,686	
	15	Pension plans, employee benefits	494,218	11,704	30,429	466,715	
	16a	Legal fees (attach schedule)	30,936	0	0	34,557	
	b	Accounting fees (attach schedule)	81,318	8,132	8,132	99,436	
	c	Other professional fees (attach schedule)	783,672	78,000	106,482	683,605	
	17	Interest	0	0	0	0	
	18	Taxes (attach schedule) (see instructions)	248,407	117,201	121,379	127,028	
	19	Depreciation (attach schedule) and depletion	1,077,751	10,017	26,663		
	20	Occupancy	1,070,683	19,495	25,977	1,040,849	
	21	Travel, conferences, and meetings	577,589	0	5,608	532,514	
	22	Printing and publications	991,528	0	159,862	845,822	
	23	Other expenses (attach schedule)	1,581,189	600,295	865,453	708,156	
	24	Total operating and administrative expenses. Add lines 13 through 23	8,971,197	889,935	1,453,760	6,470,186	
	25	Contributions, gifts, grants paid	942,500			937,400	
	26	Total expenses and disbursements. Add lines 24 and 25	9,913,697	889,935	1,453,760	7,407,586	
	27	Subtract line 26 from line 12					
	a	Excess of revenue over expenses and disbursements	-247,260				
	b	Net investment income (if negative, enter -0-)		8,087,484			
	c	Adjusted net income (if negative, enter -0-)			4,851,340		
For Paperwork Reduction Act Notice, see instructions.				Cat No 11289X		Form 990-PF (2016)	

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	748,757	1,208,051	1,208,051
	2 Savings and temporary cash investments	2,710,608	11,371	11,371
	3 Accounts receivable ▶ <u>48,132</u>			
	Less allowance for doubtful accounts ▶ <u>-1,431</u>	48,032	49,563	49,563
	4 Pledges receivable ▶ <u></u>			
	Less allowance for doubtful accounts ▶ <u></u>		0	0
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7 Other notes and loans receivable (attach schedule) ▶ <u>0</u>			
	Less allowance for doubtful accounts ▶ <u>0</u>	0	0	0
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	579,293	636,884	636,884
	10a Investments—U S and state government obligations (attach schedule)	0	0	0
	b Investments—corporate stock (attach schedule)	125,133,645 	134,654,701	134,654,701
	c Investments—corporate bonds (attach schedule)	40,197,003 	34,314,490	34,314,490
	11 Investments—land, buildings, and equipment basis ▶ <u>0</u>			
Less accumulated depreciation (attach schedule) ▶ <u>0</u>	0		0	
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	38,622,427 	48,656,277	48,656,277	
14 Land, buildings, and equipment basis ▶ <u>25,817,267</u>				
Less accumulated depreciation (attach schedule) ▶ <u>5,452,846</u>	20,862,656 	20,364,421	20,364,421	
15 Other assets (describe ▶ <u></u>)	 8,512,522 	6,443,499 	6,443,499	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	237,414,943	246,339,257	246,339,257	
Liabilities	17 Accounts payable and accrued expenses	276,280	405,067	
	18 Grants payable.	103,000	103,000	
	19 Deferred revenue	455,840	465,812	
	20 Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21 Mortgages and other notes payable (attach schedule).	13,527,788 	13,255,473	
	22 Other liabilities (describe ▶ <u></u>)			
	23 Total liabilities (add lines 17 through 22)	14,362,908	14,229,352	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	213,062,714	224,138,584	
	25 Temporarily restricted	8,657,879	6,639,879	
	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)	223,052,035	232,109,905	
	31 Total liabilities and net assets/fund balances (see instructions) .	237,414,943	246,339,257	

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	223,052,035
2 Enter amount from Part I, line 27a	2	-247,260
3 Other increases not included in line 2 (itemize) ▶ 	3	9,404,130
4 Add lines 1, 2, and 3	4	232,208,905
5 Decreases not included in line 2 (itemize) ▶ 	5	99,000
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	232,109,905

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 See Additional Data Table			
b			
c			
d			
e			

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

2 Capital gain net income or (net capital loss)	2	3,241,129
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	0

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))
2015			
2014			
2013			
2012			
2011			

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 2016 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 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 <u>2008-08-01</u> (attach copy of letter if necessary—see instructions)	1	N/A
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	
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		
3	Add lines 1 and 2.	3	0
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	0
6	Credits/Payments	6a	0
a	2016 estimated tax payments and 2015 overpayment credited to 2016		
b	Exempt foreign organizations—tax withheld at source		
c	Tax paid with application for extension of time to file (Form 8868)		
d	Backup withholding erroneously withheld		
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 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?	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>	1b	No
c Did the foundation file Form 1120-POL for this year?	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) ▶ CA, IL, NY		
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 2016 or the taxable year beginning in 2016 (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 WWW.POETRYFOUNDATION.ORG	13	Yes	
14	The books are in care of Caren Skoulas CFO Telephone no (312) 799-8001			

Located at **61 West Superior Street Chicago IL** ZIP+4 **60654**

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 2016, 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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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)? ☐ 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 2016? ☐	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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ 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). ☐	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 2016 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 2016). ☐	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 2016?	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)?	☐ Yes ☒ No	5b		No
Organizations relying on a current notice regarding disaster assistance check here.	☐ Yes ☒ No			
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?	☐ Yes ☒ No	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?	☐ Yes ☒ No	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 35 000	114,885		0
Steven Young 61 W Superior ST Chicago, IL 60654	Program Director 35 000	111,564		0
Cassie Mayer 61 W Superior ST Chicago, IL 60654	Digital Program Dir 35 000	104,500		0
Nuria Sheehan 61 W Superior ST Chicago, IL 60654	Project Manager 35 000	84,143		0
Elizabeth Burke-Dain 61 W Superior ST Chicago, IL 60654	Media Director 35 000	78,660		0
Total number of other employees paid over \$50,000.				9

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 and Development	511,977
Cenveo Publisher Services PO Box 822934 Philadelphia, PA 191822934	Printing and Mail Service	266,641
Palm Coast Data LLC 11 Commerce Blvd Palm Coast, FL 32164	Fulfillment Services	222,911
Fuzzy Math LLC 811 W Evergreen Ste 305 Chicago, IL 60642	Website Design Services	142,000
ABM Onsite Services-Midwest Inc 75 Remittance Dr Ste 3011 Chicago, IL 606753011	Building Maintenance & Services	107,933
Total number of others receiving over \$50,000 for professional services. ▶		7

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	2,517,519
2 POETRYFOUNDATION.ORG	2,178,918
3 "POETRY" MAGAZINE	1,014,716
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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	210,468,239
b	Average of monthly cash balances.	1b	1,363,981
c	Fair market value of all other assets (see instructions).	1c	380,798
d	Total (add lines 1a, b, and c).	1d	212,213,018
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	132,550
3	Subtract line 2 from line 1d.	3	212,080,468
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	3,181,207
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	208,899,261
6	Minimum investment return. Enter 5% of line 5.	6	10,444,963

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 2016 from Part VI, line 5.	2a	
b	Income tax for 2016 (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	7,407,586
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	549,654
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	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	7,957,240
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	7,957,240

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ _____				
a Applied to 2015, 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 2016 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 (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 2015 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 2017				
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 2011 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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 2016, 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				(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	4,851,340	3,600,278	3,299,062	3,245,899	14,996,579
b 85% of line 2a	4,123,639	3,060,236	2,804,203	2,759,014	12,747,092
c Qualifying distributions from Part XII, line 4 for each year listed	7,957,240	8,697,072	7,142,292	6,988,052	30,784,656
d Amounts included in line 2c not used directly for active conduct of exempt activities	767,400	948,100	828,950	720,700	3,265,150
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	7,189,840	7,748,972	6,313,342	6,267,352	27,519,506
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.	6,963,309	7,048,689	6,800,445	5,969,249	26,781,692
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 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))

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

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 YEAR ROUND ON A PERIODIC 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

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 <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				937,400
b <i>Approved for future payment</i> See Additional Data Table				
Total ▶ 3b				103,000

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a <u>MAGAZINE SUBSCRIPTIONS</u>					470,896
b <u>Single Copy Sale Income</u>					4,280
c <u>Distributor Gross Sale Income</u>					52,628
d <u>Digital Subscriptions-Earned</u>					8,318
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	154	
4 Dividends and interest from securities.			14	5,380,901	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	335,869	
8 Gain or (loss) from sales of assets other than inventory	525990	-129,843	18	3,241,129	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a <u>Sale of Mail Lists</u>			1	8,308	
b <u>Miscellaneous Income</u>			1	47,198	
c <u>ADVERTISING INCOME</u>	541800	23,880			
d <u>Royalty Income</u>			15	24,208	
e _____					
12 Subtotal. Add columns (b), (d), and (e).		-105,963		9,037,767	536,122
13 Total. Add line 12, columns (b), (d), and (e).			13		9,467,926

[illegible]

Part XVII

- 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.

[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.

	2017-11-10
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**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	Bridget T Roche		2017-10-02		P00666837
	Firm's name ▶ Grant Thornton LLP				Firm's EIN ▶ 36-6055558
	Firm's address ▶ 171 N Clark St Chicago, IL 606013370				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	(c) Date acquired (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-Long Term P	P		
Publically Traded Securities-Cap GN DIST Property Type Securities	P		
Publically Traded Securities-Long Term P	P		
Publically Traded Securities-Cap GN DIST Property Type Securities	P		
Publically Traded Securities-Long Term P	P		
Publically Traded Securities-Long Term P	P		
Publically Traded Securities-Cap GN DIST Property Type Securities	P		
Publically Traded Securities-Cap GN DIST Property Type Securities	P		

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

(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)
223,353			223,353
617,416			617,416
1,750,000		1,649,912	100,088
25,985			25,985
4,000,000		4,326,923	-326,923
137,113			137,113
1,700,000		894,549	805,451
2,250,000		2,283,166	-33,166
105,487			105,487
174,479			174,479

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			(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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
		0	223,353
		0	617,416
		0	100,088
		0	25,985
		0	-326,923
		0	137,113
		0	805,451
		0	-33,166
		0	105,487
		0	174,479

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
LT Capital Gain from LPS-Securities Property Type Securities	P		
ST Capital Gain from LPS-Securities Property Type Securities	P		
Publically Traded Securities-Cap GN DIST Property Type Securities	P		

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

(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)
1,291,190			1,291,190
0		5,593	-5,593
126,249			126,249

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			(l) 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	
		0	1,291,190
		0	-5,593
		0	126,249

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 35 000	337,680	25,000	0
61 W Superior Street Chicago, IL 60654				
Lonnie Bunch	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Willard Bunn	Vice Chair/Chair 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Ally Bulley	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Marian Godfrey	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Kary McIlwain	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Stuart Miller	Secretary 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Susan Noyes	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
David Ormesher	Vice Chair 35 000	0	0	0
61 W Superior Street Chicago, IL 60654				
James Rondeau	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Charlie Pierce	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Scott Turrow	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Robert Wedgeworth	Trustee 35 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Benna Wilde	Vice Chair 35 000	0	0	0
61 W Superior Street Chicago, IL 60654				
Caren Yanis	Trustee 2 000	0	0	0
61 W Superior Street Chicago, IL 60654				

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
Caren Skoulas 61 W Superior Street Chicago, IL 60654	CFO 35 000	172,092	71,148	0

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
Good Hope High School 210 Good Hope School Rd Cullman, AL 35057	None	PC	Grant for Book Purchase	200
New Century Technology High School 2500 Meridian St Huntsville, AL 35811	None	PC	Grant for Book Purchase	500
Raina Verser 445 Rice Dr Huntsville, AL 35808	None	I	Recitation Prize	200
Maggie Stewart 4590 County Road 616 Hanceville, AZ 35077	None	I	Recitation Prize	100
Olivia McDermott-Sipe 593 South Cave Rd Bloomington, IN 47403	None	I	Recitation Prize	100
Total ▶ 3a				937,400

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>				
Bloomington High School North 3901 North Kinser Pike Bloomington, IN 47403	None	PC	Grant for Book Purchase	200
Grace Milligan 4339 E Fairway Ct Monticello, IN 47960	None	I	Recitation Prize	200
Twin Lakes High School 300 S 3rd St Monticello, IN 47960	None	PC	Grant for Book Purchase	500
Nicholas L Amador 737 Twin View Drive Honolulu, HI 96817	None	I	Recitation Prize	200
Punahou School 1601 Punahou Street Honolulu, HI 96822	None	PC	Grant for Book Purchase	500
Total ▶ 3a				937,400

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>				
Mid-Pacific Institute 2445 Kaala St Honolulu, HI 96822	None	PC	Grant for Book Purchase	200
Carson Morneau 92-831 Makakilo Dr 30 Kapolei, HI 96707	None	I	Recitation Prize	100
Naomi Cliett 612 N Miles St Elizabethtown, KY 42701	None	I	Recitation Prize	200
Elizabethtown High School 620 North Mulberry Elizabethtown, KY 42701	None	PC	Grant for Book Purchase	500
Betsy Layne High School PO Box 437 Betsy Layne, KY 41605	None	PC	Grant for Book Purchase	200
Total 				937,400
3a				

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>				
Hannah Sturgis 560 Dairy Dr Smyrna, DE 19977	None	I	Recitation Prize	200
Brandon Dawson 245 Union Church Rd Townsend, DE 19734	None	I	Recitation Prize	100
Middletown High School 120 Silver Lake Rd Middletown, DE 19709	None	PC	Grant for Book Purchase	200
Dominique Mims 2256 Toler Creek Harold, KY 41635	None	I	Recitation Prize	100
Polytech High School 823 Walnut Shade Rd Woodside, DE 19980	None	PC	Grant for Book Purchase	500
Total 				937,400
3a				

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>				
Madison Heggins 1437 Bobing Dr Lewisville, TX 75067	None	I	Recitation Prize	200
Sam Terry 9231 Bingham San Antonio, TX 78230	None	I	Recitation Prize	100
Keystone School 119 E Craig Pl San Antonio, TX 78212	None	PC	Grant for Book Purchase	200
Lewisville High School 1098 W Main St Lewisville, TX 75067	None	PC	Grant for Book Purchase	500
Grace Beumler 572 Bison Trail Dakota Dunes, SD 57049	None	I	Recitation Prize	200
Total ▶ 3a				937,400

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>				
Bishop Heelan High School 1018 Grandview Blvd Sioux City, IA 51102	None	PC	Grant for Book Purchase	500
Samba Traore 1804 Rochester Ave Iowa City, IA 52245	None	I	Recitation Prize	100
El Camino High School at Ventura College 61 Day Road Ventura, CA 93003	None	PC	Grant for Book Purchase	200
Zayan Reza 1939 Ribera Dr Oxnard, CA 93030	None	I	Recitation Prize	100
Iowa City High School 1900 Morningside Dr Iowa City, IA 52245	None	PC	Grant for Book Purchase	200
Total ▶ 3a				937,400

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>				
Chigozie Maduchukwu 9472 Havenview Way Elk Grove, CA 95624	None	I	Recitation Prize	200
Pleasant Grove High School 9531 Bond Rd Elk Grove, CA 95624	None	PC	Grant for Book Purchase	500
University High School Academy 19301 Twelve Mile Rd Lathrup Village, MI 48076	None	PC	Grant for Book Purchase	500
Lyndon LeRoi DeFoe 20945 Andover Rd Southfield, MI 48076	None	I	Recitation Prize	200
Mary Kate Wright 536 Gilbert St Owosso, MI 48867	None	I	Recitation Prize	100
Total 3a				937,400

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>				
Owosso High School 765 E North St Owosso, MI 48867	None	PC	Grant for Book Purchase	200
Juan A Oseguera 1316 Whispering Hill Ada, OK 74820	None	I	Recitation Prize	200
Ellensburg High School 1203 E Capitol Ave Ellensburg, WA 98926	None	PC	Grant for Book Purchase	500
Khayyah Barber 1533 Ellis Rd Apt H206 Durham, NC 27703	None	I	Recitation Prize	100
Romee Johnson 4390 Skyline Loop Victor, ID 83455	None	I	Recitation Prize	200
Total ▶ 3a				937,400

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>				
Tipton Catholic High School PO Box 146 Tipton, KS 67485	None	PC	Grant for Book Purchase	500
Sarah Katsiyiannis PO Box 83 Tipton, KS 67485	None	I	Recitation Prize	200
Kyla Rose Bates 7835 Wimbledon Ave Baton Rouge, LA 70810	None	I	Recitation Prize	200
Greenbrier East High School 273 Spartan Ln Lewisburg, WV 24901	None	PC	Grant for Book Purchase	500
Jasmine Jackson 703 Hardee Rd Kinston, NC 28504	None	I	Recitation Prize	200
Total 3a				937,400

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>				
Madeleine Windel HC 62 Box 263 Ozone, AR 72854	None	I	Recitation Prize	200
Jane Kent 345 Winchester Cir Mandeville, LA 70448	None	I	Recitation Prize	100
International Community School 11133 NE 65th Kirkland, WA 98033	None	PC	Grant for Book Purchase	200
Lawton High School 601 NW Ft Sill Blvd Lawton, OK 73507	None	PC	Grant for Book Purchase	200
Oregon School for the Deaf 999 Locust Street NE Salem, OR 973010954	None	PC	Grant for Book Purchase	200
Total 				937,400
3a				

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>				
Wichita East High School 2301 E Douglas Ave Wichita, KS 67211	None	PC	Grant for Book Purchase	200
Manmeet Pelia 2800 Foullois Dr Wichita, KS 97210	None	I	Recitation Prize	100
Jeana Lovett 1111 Heather Dr Waldron, AR 72958	None	I	Recitation Prize	100
Jake Andrews 491 Cedar Core Rd Ellensburg, WA 98926	None	I	Recitation Prize	200
Neely Seams 210 Hahn St Lewisburg, WV 24901	None	I	Recitation Prize	200
Total 				937,400
3a				

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>				
Teton High School 555 Ross Ave Driggs, ID 83422	None	PC	Grant for Book Purchase	500
Deer K-12 School PO Box 56 Deer, AR 72628	None	PC	Grant for Book Purchase	500
Kinston High School 2601 N Queen St Kinston, NC 28525	None	PC	Grant for Book Purchase	500
Voyager Academy 4302 Ben Franklin Blvd Durham, NC 27704	None	PC	Grant for Book Purchase	200
Abbey Delk 30 Guilford Dr Wheeling, WV 26003	None	I	Recitation Prize	100
Total 				937,400
3a				

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>				
Carol Ambriz 4816 NW Pollards Ave Lawton, OK 73505	None	I	Recitation Prize	100
Mehak Mann 19908 NE 129th St Woodinville, WA 98077	None	I	Recitation Prize	100
Zachary High School 4100 Bronco Lane Zachary, LA 70791	None	PC	Grant for Book Purchase	500
Wheeling Park High School 1976 Park View Road Wheeling, WV 26003	None	PC	Grant for Book Purchase	200
Ada High School 1400 S Stadium Dr Ada, OK 74820	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Oceana Vasquez 1311 Louisiana Blvd NE Apt 221 Albuquerque, NM 87110	None	I	Recitation Prize	100
La Cueva High School 7801 Wilshire Ave NE Albuquerque, NM 87122	None	PC	Grant for Book Purchase	500
Michelle Zhou 11704 Corona Ave NE Albuquerque, NM 87122	None	I	Recitation Prize	200
Public Academy for Performing Arts 11800 Princess Jeanne NE Albuquerque, NM 87112	None	PC	Grant for Book Purchase	200
LPPACS 1 Lincoln Park Midland, PA 15059	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Greer LeRoy 860 Virginia Ave Midland, PA 15059	None	I	Recitation Prize	200
Taelor Nielsen 3824 Ave F Billings, MT 59102	None	I	Recitation Prize	100
Summit High School PO Box 568 Jackson, WY 83001	None	PC	Grant for Book Purchase	500
Hickory High School 640 N Hermitage Rd Hermitage, PA 16148	None	PC	Grant for Book Purchase	200
Worland High School 801 S 17th St Worland, WY 82401	None	PC	Grant for Book Purchase	200
Total ▶ 3a				937,400

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>				
Lucy Martinez Galicia PO Box 6734 Jackson, WY 83002	None	I	Recitation Prize	200
Lawson David Marchetti 41 Moss Forest Circle Jackson, MS 39211	None	I	Recitation Prize	200
Parkway North High School 12860 Fee Fee Rd St Louis, MO 63146	None	PC	Grant for Book Purchase	500
Sarah Koo 14 Harvest Glen Ct Creve Coeur, MO 63141	None	I	Recitation Prize	200
Emma Gousset 522 East Jackson St Tupelo, MS 38804	None	I	Recitation Prize	100
Total 3a				937,400

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				
Abigail Etterson 6770 Hougen Ln Duluth, MN 55803	None	I	Recitation Prize	200
Molly Williams 1650 SE Hamblen Rd Lees Summit, MO 64081	None	I	Recitation Prize	100
Tupelo High School 4125 Golden Wave Dr Tupelo, MS 38801	None	PC	Grant for Book Purchase	200
Summit Christian Academy 1500 SW Jefferson Lees Summit, MO 64081	None	PC	Grant for Book Purchase	200
Jackson Preparatory School PO Box 4940 Jackson, MS 39296	None	PC	Grant for Book Purchase	500
Total ▶ 3a				937,400

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>				
St Paul Academy and Summit School 1712 Randolph Ave St Paul, MN 55105	None	PC	Grant for Book Purchase	200
Harbor City Interntional School 332 W Micigan St Ste 300 Duluth, MN 55802	None	PC	Grant for Book Purchase	500
Meghan Joyce 2133 Ann Arbor St St Paul, MN 55104	None	I	Recitation Prize	100
Hunter Hazelton 92 W Holly Ln Avondale, AZ 85323	None	I	Recitation Prize	200
The Gregory School 3231 N Craycroft Rd Tucson, AZ 85712	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
Amber Price 9744 Dee Rd Apt 302 Des Plaines, IL 60016	None	I	Recitation Prize	100
Maine East High School 2601 W Dempster Ave Park Ridge, IL 60068	None	PC	Grant for Book Purchase	200
Mariah L Brooks 2025 Gregory Ct Springfield, IL 62703	None	I	Recitation Prize	200
Springfield Southeast High School 2350 East Ash St Springfield, IL 62703	None	PC	Grant for Book Purchase	500
Betty Fairfax High School 8225 S 59th Ave Laveen, AZ 85339	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Caitlin A McCormick 724 E University Blvd Tucson, AZ 85719	None	I	Recitation Prize	100
West Port High School 3733 SW 80th Ave Ocala, FL 34481	None	PC	Grant for Book Purchase	500
Kirsten Meier 1080 Lafayette Ct Brookfield, WI 53005	None	I	Recitation Prize	200
Jesse Kruse PO Box 266 Harington, NE 68739	None	I	Recitation Prize	100
Cedar Catholic High School PO Box 15 Hartington, NE 68739	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
Jarod Atchley 3373 SW 51 Terr Ocala, FL 34474	None	I	Recitation Prize	200
Sharese Acheampong 4709 Eiderdown Ct Owings Mills, MD 21117	None	I	Recitation Prize	200
Savannah Nicole Smith 1508 Waukesha Ave Helena, MT 59601	None	I	Recitation Prize	200
Mitchell Lenneville PO Box 3131 Tualatin, OR 97062	None	I	Recitation Prize	200
Nicole Sadek 1501 Jacaranda Ct Mount Pleasant, SC 29466	None	I	Recitation Prize	200
Total 3a				937,400

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>				
Cody Tulip N6473 Joyce Rd Arkansaw, WI 54721	None	I	Recitation Prize	100
Jamie Montagne 322 Ashwick Ct Spartanburg, SC 29301	None	I	Recitation Prize	100
Tatiana Saleh 11041 Castlemain Cir E Jacksonville, FL 32256	None	I	Recitation Prize	100
Danielle Vitullo 4958 Reedy Brook Ln Columbia, MD 21044	None	I	Recitation Prize	100
Guadalupe Nava-Pena 3565 48th Ave NE Salem, OR 97305	None	I	Recitation Prize	100
Total ▶ 3a				937,400

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>				
Spartanburg Day School 1701 Skylyn Dr Spartanburg, SC 29307	None	PC	Grant for Book Purchase	200
Capital High School MT 100 Valley Dr Helena, MT 59601	None	PC	Grant for Book Purchase	200
Brookfield Central High School 16900 W Gebhardt Rd Brookfield, WI 53005	None	PC	Grant for Book Purchase	500
Taylor Blossom 905 Lodestar Rd Helena, MT 59602	None	I	Recitation Prize	100
Helena High School 1300 Billings Avenue Helena, MT 59601	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Colegio San Jose PO Box 87 San German, PR 00683	None	PC	Grant for Book Purchase	200
Thayer Central Community Schools PO Box 9 930 Eads Ave Hebron, NE 68370	None	PC	Grant for Book Purchase	500
Maggie Harris 6330 Rd S Belvidere, NE 68315	None	I	Recitation Prize	200
Esc Sec de la Universidad de Puerto Rico PO Box 23319 San Juan, PR 009313319	None	PC	Grant for Book Purchase	500
Douglas Anderson School of Arts 2445 San Diego Rd Jacksonville, FL 32207	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
Charleston Co School of the Arts 5109-B West Enterprise Street N Charleston, SC 29405	None	PC	Grant for Book Purchase	500
Aloha Community Library Association PO Box 6561 Aloha, OR 97007	None	PC	Grant for Book Purchase	500
Paola A Lugo Urb Paraiso de Mayaguez 159 Mayaguez, PR 00680	None	I	Recitation Prize	100
Wenmi-Mareba Collins F-14 Calle B Reparto Contemporaneo San Juan, PR 00926	None	I	Recitation Prize	200
New Town High School 4931 New Town Blvd Owings Mills, MD 21117	None	PC	Grant for Book Purchase	500
Total ► 3a				937,400

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>				
Meloe Naze 119 Warrent St Apt 2 Revere, MA 02151	None	I	Recitation Prize	100
Courtney Stewart 2132 Wilbraham Rd Springfield, MA 01119	None	I	Recitation Prize	200
Jeremy Roth-Rose 66 Fosdyke St Providence, RI 02906	None	I	Recitation Prize	100
Irvin Mason Jr PO Box 307858 St Thomas, VI 00803	None	I	Recitation Prize	200
All Saints Cathedral School PO Box 308 St Thomas, VI 00804	None	PC	Grant for Book Purchase	500
Total ▶ 3a				937,400

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>				
Austin Paulhus L/7 Fales St FL 2 Central Falls, RI 02863	None	I	Recitation Prize	200
Springfield Central High School 1840 Roosevelt Ave Springfield, MA 01109	None	PC	Grant for Book Purchase	500
Classical High School 770 Westminster St Providence, RI 02903	None	PC	Grant for Book Purchase	200
Chiara Raimondo 403 Margaret St Jamestown, NY 14701	None	I	Recitation Prize	200
Caroline Huber 103 Gramercy Ct Minot AFB, ND 58704	None	I	Recitation Prize	200
Total 3a				937,400

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>				
Minot High School 1100 11th Ave SW Minot, ND 58701	None	PC	Grant for Book Purchase	500
Northern Cass School 16021 18th St SE Hunter, ND 58048	None	PC	Grant for Book Purchase	200
Zach Howatt 602 Lynn Dawn Dr Argusville, ND 58005	None	I	Recitation Prize	100
Jamestown High School 350 E 2nd St Jamestown, NY 14701	None	PC	Grant for Book Purchase	500
Maggie Capozzoli-Cavota 248-30 Van Zandt Ave Douglaston, NY 11362	None	I	Recitation Prize	100
Total ▶ 3a				937,400

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>				
St Francis Preparatory 6100 Francis Lewis Blvd Fresh Meadows, NY 11365	None	PC	Grant for Book Purchase	200
David Cendon Garcia 6155 Fountain Valley Rd Colorado Springs, CO 80911	None	I	Recitation Prize	200
Fountain Valley School 6155 Fountain Valley School Rd Colorado Springs, CO 80911	None	PC	Grant for Book Purchase	500
Emily Saunders 511 Wall St Hebron, CT 06248	None	I	Recitation Prize	200
MT Ararat High School 73 Eagles Way Topsham, ME 04086	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
McKinley Technology High School 151 T St NE Washington, DC 20002	None	PC	Grant for Book Purchase	500
Rose Horowitz 75 Ash Cove Rd Harpswell, ME 04079	None	I	Recitation Prize	200
Rangeley Lakes Regional School 43 Mendolia Rd Rangeley, ME 04970	None	PC	Grant for Book Purchase	200
West Anchorage High School 1700 Hillcrest Dr Anchorage, AK 99517	None	PC	Grant for Book Purchase	500
John Richardson 800 Quaint Acres Dr Silver Spring, MD 20904	None	I	Recitation Prize	100
Total ▶ 3a				937,400

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>				
Owen Sinclair PO Box 212 Rangeley, ME 04970	None	I	Recitation Prize	100
RHAM High School 85 Wall St Hebron, CT 06278	None	PC	Grant for Book Purchase	500
Erica Jones 316 50th St NE Washington, DC 20019	None	I	Recitation Prize	200
Shannon Croft 1135 Hillcrest Dr Anchorage, AK 99503	None	I	Recitation Prize	200
EO Smith High School 1235 Storrs Rd Storrs, CT 06268	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
St Anselm's Abbey School 4501 S Dakota Ave NE Washington, DC 20017	None	PC	Grant for Book Purchase	200
Owen Elphick 470 South Eagleville Rd Storrs, CT 06268	None	I	Recitation Prize	100
Kira Amels 10660 Braselton St Highlands Ranch, CO 80126	None	I	Recitation Prize	100
Mountain Vista High School 10585 Mountain Vesta Rdg Highlands Ranch, CO 80129	None	PC	Grant for Book Purchase	200
Juan Diego Catholic High School 11800 S 300 E Draper, UT 84020	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
Tessa Thornley 92802 N 11600 W Tremonton, UT 84337	None	I	Recitation Prize	200
Maggie Fitzgerald 1397 Spear St South Burlington, VT 05403	None	I	Recitation Prize	200
Rice Memorial High School 99 Proctor Ave S Burlington, VT 05403	None	PC	Grant for Book Purchase	500
Celeste Sena 40 Tuers Ave Jersey City, NJ 07306	None	I	Recitation Prize	200
Patrick Monaghan 91 Riverview Ave Little Silver, NJ 07739	None	I	Recitation Prize	100
Total ▶ 3a				937,400

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>				
Dr Ronald E McNair Academic High School 123 Coles St Jersey City, NJ 07302	None	PC	Grant for Book Purchase	500
Red Bark Regional High School 101 Ridge Rd Little Silver, NJ 07739	None	PC	Grant for Book Purchase	200
Ahkei Togun 5711 Fairford Lane Virginia Beach, VA 23464	None	I	Recitation Prize	200
Charisma Henry 10235 Evesham Ln Fairfax, VA 22030	None	I	Recitation Prize	100
Tallwood High School 1668 Kempsville Rd Virginia Beach, VA 23464	None	PC	Grant for Book Purchase	500
Total ▶ 3a				937,400

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>				
W T Woodson 9525 Main St Fairfax, VA 22031	None	I	Recitation Prize	200
Thomas Ellison 4104 Fleetwood Dr Dayton, OH 45416	None	I	Recitation Prize	200
Chaminade-Julienne High School 505 S Ludlow St Dayton, OH 45402	None	PC	Grant for Book Purchase	500
Harding Academy of Memphis 1100 Cherry Rd Memphis, TN 38117	None	PC	Grant for Book Purchase	200
Marquavious De'Shawn Moore 3608 Kirby Terrace Dr Memphis, TN 38115	None	I	Recitation Prize	100
Total 3a				937,400

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>				
Alexia Buckner 4604 Tulip Bend Dr Memphis, TN 38135	None	I	Recitation Prize	200
Noah Martin 6880 Spring Run Dr Westerville, OH 43082	None	I	Recitation Prize	100
Mikayla Bates 316 Forest Ln Elko, NV 89801	None	I	Recitation Prize	200
Westerville Central High Library 7118 Mt Royal Ave Westerville, OH 43082	None	PC	Grant for Book Purchase	200
Bolton High School 7323 Brunswick Rd Arlington, TN 38002	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Yerington High School 114 Pearl Street Yerington, NV 89447	None	PC	Grant for Book Purchase	200
Elko High School 987 College Ave Elko, NV 89801	None	PC	Grant for Book Purchase	500
Gabrielle Hunt 5 Cherry Hills Lane Yerington, NV 89447	None	I	Recitation Prize	100
Joshua Sands-Lee 1701 Macon Rd Apt 512 Perry, GA 31069	None	I	Recitation Prize	100
Perry High School 1307 North Ave Perry, GA 31069	None	PC	Grant for Book Purchase	200
Total 3a				937,400

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>				
Marta Palombo 14485 Eighteenth Fairway Alpharetta, GA 30004	None	I	Recitation Prize	200
Cambridge High School 2845 Bethany Bend Milton, GA 30004	None	PC	Grant for Book Purchase	500
Danielle Corbett 67 North Rd Sandown, NH 03873	None	I	Recitation Prize	200
Goffstown High School 27 Wallace Rd Goffstown, NH 03045	None	PC	Grant for Book Purchase	200
Alexia Gorton PO Box 239 New Boston, NH 03070	None	I	Recitation Prize	100
Total 3a				937,400

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>				
Sioux Falls Lincoln High School 2900 S Cliff Ave Sioux Falls, SD 57105	None	PC	Grant for Book Purchase	500
Maddie Lukomski 5909 W Sioux K Ct Sioux Falls, SD 57106	None	I	Recitation Prize	200
Miliyna Megosha 1501 State St Marshall, MN 56258	None	I	Recitation Prize	100
Chiara Raimondo 403 Margaret St Jamestown, NY 14701	None	I	Recitation Prize	1,000
Ahkei Togun 5711 Fairford Lane Virginia Beach, VA 23464	None	I	Recitation Prize	20,000
Total 				937,400
3a				

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>				
Punahou School 1601 Punahou Street Honolulu, HI 96822	None	PC	Grant for Book Purchase	500
Greenbrier East High School 273 Spartan Ln Lewisburg, WV 24901	None	PC	Grant for Book Purchase	500
Helena High School 1300 Billings Avenue Helena, MT 59601	None	PC	Grant for Book Purchase	500
Lewisville High School 1098 W Main St Lewisville, TX 75067	None	PC	Grant for Book Purchase	500
Jamestown High School 350 E 2nd St Jamestown, NY 14701	None	PC	Grant for Book Purchase	500
Total 3a				937,400

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>				
Jackson Preparatory School PO Box 4940 Jackson, MS 39296	None	PC	Grant for Book Purchase	500
Elko High School 987 College Ave Elko, NV 89801	None	PC	Grant for Book Purchase	500
Tallwood High School 1668 Kempsville Rd Virginia Beach, VA 23464	None	PC	Grant for Book Purchase	500
Cambridge High School 2845 Bethany Bend Milton, GA 30004	None	PC	Grant for Book Purchase	500
Nicholas L Amador 737 Twin View Drive Honolulu, HI 96817	None	I	Recitation Prize	5,000
Total ► 3a				937,400

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>				
Lawson David Marchetti 41 Moss Forest Circle Jackson, MS 39211	None	I	Recitation Prize	1,000
Madison Heggins 1437 Bobing Dr Lewisville, TX 75067	None	I	Recitation Prize	1,000
Mikayla Bates 316 Forest Ln Elko, NV 89801	None	I	Recitation Prize	1,000
Neely Seams 210 Hahn St Lewisburg, WV 24901	None	I	Recitation Prize	1,000
Marta Palombo 14485 Eighteenth Fairway Alpharetta, GA 30004	None	I	Recitation Prize	10,000
Total ▶ 3a				937,400

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>				
Esc Sec de la Universidad de Puerto Rico PO Box 23319 San Juan, PR 009313319	None	PC	Grant for Book Purchase	500
Wenmi-Mareba Collins F-14 Calle B Reparto Contemporaneo San Juan, PR 00926	None	I	Recitation Prize	1,000
Maud Sharese Acheampong 4709 Eiderdown Ct Owings Mills, MD 21117	None	I	Recitation Prize	1,000
Savannah Nicole Smith 1508 Waukesha Ave Helena, MT 59601	None	I	Recitation Prize	1,000
Kyla Rose Bates 7835 Wimbledon Ave Baton Rouge, LA 70810	None	I	Recitation Prize	1,000
Total ▶ 3a				937,400

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 and Writers Inc 557 Broadway New York, NY 10012	None	PC	National Student Poets Program	25,000
American Public Media CM - 9788 PO Box 70870 St Paul, MN 551709788	None	PC	The Writer's Almanac Sponsorship	120,000
Arts Alliance Illinois 70 E Lake St Suite 420 Chicago, IL 60601	None	PC	Institutional Partner Membership	1,000
AWP George Mason University 4400 Univer sity Dr Fairfax, VA 22030	None	PC	AWP Conference Sponsorship	10,000
Total ► 3a				937,400

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>				
Boston University 236 Bay State Road Boston Universit y Boston, MA 02215	None	PC	Favorite Poem Project	20,000
Brooklyn Arts Council 20 Jay St Ste 616 Brooklyn, NY 11201	None	PC	Alzheimer's Poetry Project	10,000
Bump Club Chicago 1820 W Webster Ste 400 Chicago, IL 60614	None	PC	Event sponsorship	500
Chicago Book Expo NFP 911 Michigan Ave 2 Evanston, IL 60202	None	PC	General Support of Poetry Programs	1,000
Chicago Humanities Festival 500 N Dearborn Chicago, IL 60654	None	PC	Event sponsorship	4,000
Total ▶ 3a				937,400

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>				
Community Partners 1330 Factory Place Unit F-104 Los Angeles, CA 90013	None	PC	Program Sponsorship	500
Furious Flower Center for Poetry James Madison University MSC 3802 Harrisonburg, VA 22807	None	PC	Seminar Sponsorship	12,000
Guild Complex 641 W Lake St Ste 200 Chicago, IL 60661	None	PC	General Support of Poetry Programs	13,000
National Poetry Series 57 Mountain Ave Princeton, NJ 08540	None	PC	General Support of Poetry Programs	25,000
Poetry Society of America Brett Fletcher Lauer 15 Gramercy Park New York, NY 10003	None	PC	General Support of Poetry Programs	1,000
Total ▶ 3a				937,400

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>				
Small Press Distribution 1341 7th St Berkeley, CA 94710	None	PC	The SPD Bee Sponsorship	1,000
Snow City Arts Foundation 1653 W Congress Pkwy Rush-Kidston 1 03 Chicago, IL 60612	None	PC	General Support of Poetry Programs	10,000
The American Writers Museum 205 W Wacker Dr Ste 625 Chicago, IL 60606	None	PC	Support of Poetry Exhibition	15,000
The Chicago High School for the Arts ChiArts 2714 W Augusta Blvd Chicago, IL 60622	None	PC	General Support of Poetry Programs	40,000
The Joffrey Ballet 10 E Randolph St Chicago, IL 60601	None	PC	Dance program development	30,000
Total ▶ 3a				937,400

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>				
University of Nebraska University of Nebraska-Lincoln 151 Whittier Research Center Lincoln, NE 685830861	None	PC	Poetry in Newspapers Syndication	38,500
WETA Attn R Schneider COO 2775 S Quincy St Arlington, VA 222062269	None	PC	PBS NewsHour Sponsorship	200,000
Alison Canada Rollins 2444 Oakland Ave St Louis, MO 63114	None	I	Ruth Lilly Fellowship	26,800
Angel Nafis 180 Woodruff Ave Apt 11 Brooklyn, NY 11226	None	I	Ruth Lilly Fellowship	26,800
Aracelis Girmay 180 Decatur St Apt 2R Brooklyn, NY 11217	None	I	Bess Hokin Prize	1,000
Total ▶ 3a				937,400

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>				
Charles Edwin Roberson 501 East 32nd St Apt 801 Chicago, IL 60616	None	I	Ruth Lilly Poetry Prize	100,000
Christopher B Ricks 39 Martin St Cambridge, MA 02138	None	I	Pegasus Award for Poetry Criticism	3,750
Forrest Gander 351 Nayatt Road Barrington, RI 028064336	None	I	Levinson Prize	500
Garrett Caples 145 Fair Oaks Street San Francisco, CA 94110	None	I	Editors Prize for Feature Article	1,000
Hai-Dang Phan 340 SW 5th St Unit 702 Des Moines, IA 50309	None	I	Frederick Bock Prize	500
Total ▶ 3a				937,400

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>				
Heather Geraldine Phillipson Flat 13 Melford Court 37-39 Upper Clapton Road London E58AZ UK	None	I	The Friends of Literature Prize	500
Jim Johnstone 38 Joe Shuster Way Apt 1228 Toronto, ON M6K0A5 CA	None	I	Editors Prize for Reviewing	1,000
Jim McCue 61-63 Lant St London SE11QN UK	None	I	Pegasus Award for Poetry Criticism	3,750
John Steven Murillo 701 St Marks Ave 1D Brooklyn, NY 11216	None	I	J Howard and Barbara M J Wood Prize	5,000
Jose Javier Zamora PO Box 9014 San Rafael, CA 94912	None	I	Ruth Lilly Fellowship	26,800
Total ► 3a				937,400

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				
Joshua David Charles 505 W 5th St 101 Long Beach, CA 90802	None	I	Ruth Lilly Fellowship	26,800
Julia Guez 160 Huron St 1 Brooklyn, NY 11222	None	I	John Frederick Nims Memorial Prize for Translation	500
Kaveh Akbar 630 W Virginia St Unit 225 Tallahassee, FL 32304	None	I	Ruth Lilly Fellowship	26,800
Samantha Zighelboim 245 E 35th St 6D New York, NY 10016	None	I	John Frederick Nims Memorial Prize for Translation	500
Total ▶ 3a				937,400

TY 2016 Accounting Fees Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	81,318	8,132	8,132	99,436

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

TY 2016 Depreciation Schedule

Name: The Poetry Foundation

EIN: 36-2490808

Software ID: 16000421

Software Version: 2016v3.0

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Office Equipment		452,550	425,553	S-L	3	31,427	484	1,150	
Website		2,810,993	1,933,760	S-L	3	514,974	0	0	
Books		205,706	86,403	S-L	10	22,904	0	0	
Building		15,084,540	3,007,130	S-L		508,446	9,533	25,513	
Land		7,263,478	0	None					

TY 2016 General Explanation Attachment**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1	"POETRY magazine" - \$ 1,014,716 (Expense is net of program revenue of \$536 thousand)	Form 990-PF, Part IX-A	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 and presents 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 20,000 in December 2016 In addition to the print edition, a complete archival and current edition of the magazine is offered on the web as well as in a digital subscription The magazine is made available for free on the Foundation website

General Explanation Attachment

Identifier	Return Reference	Explanation	
2	"Poetryfoundation.org" - \$2,178,918	Form 990-PF, Part IX-A	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 2016, the Foundation completed a rebuild of its content management system (CMS) to support the exponential growth of traffic to the site as well as accommodate new technology going forward. With the successful implementation of the CMS, the Digital team began work on a comprehensive redesign of the front end of the website for a planned launch in 2017. The Foundation's Poetry Tool provided free public access to over 13,000 poems. The website 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 website had 36 million unique visitors in 2016. It had over 116 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 website and smart phone Applications. Additionally, free poetry videos are offered for both adult and young poetry users.

General Explanation Attachment

Identifier	Return Reference	Explanation	
3	"Educational and Public Programs and Prizes " - \$2,517,519	Form 990-PF, Part IX-A	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 space is open to the public including a poetry library, exhibition space and performance space designed specifically for the spoken word. The Library's 2016 activities made nearly 30,000 books of poetry and about poetry available to the public. The Foundation presented poetry programming, in person to 5,000 people in its new building and several other venues. The Library and Exhibition space welcomed over 3,000 visitors on non-event days. 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 children's poetry activities, public radio and television poetry programming, and prizes and awards for excellence in poetry. Poetry Out Loud, a national program of poetry recitation in high schools completed its 10th year. Working with the National Endowment for the Arts, the Foundation's 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 Foundation's 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 Fellowships.

TY 2016 Investments Corporate Bonds Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Mutual Fund Bonds	34,314,490	34,314,490

TY 2016 Investments Corporate Stock Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Domestic Equities	96,968,891	96,968,891
International Equities	37,685,810	37,685,810

TY 2016 Investments - Other Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Private Equity	FMV	13,968,110	13,968,110
Real Estate	FMV	19,965,624	19,965,624
Natural Resources	FMV	786,959	786,959
Credit Fund	FMV	3,184,579	3,184,579
Hedge Fund	FMV	10,751,005	10,751,005

**TY 2016 Land, Etc.
Schedule****Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Land	7,263,478	0	7,263,478	7,263,478
Equipment	452,550	425,553	26,997	26,997
Website	2,810,993	1,933,760	877,233	877,233
Library Books	205,706	86,403	119,303	119,303
Building	15,084,540	3,007,130	12,077,410	12,077,410

TY 2016 Legal Fees Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Legal Fees	30,936	0	0	34,557

TY 2016 Mortgages and Notes Payable Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0**Total Mortgage Amount:** 13,527,788

Item No.	1
Lender's Name	Various Publically Issued Bonds
Lender's Title	IFA Revenue Bonds
Relationship to Insider	None
Original Amount of Loan	15,000,000
Balance Due	13,255,473
Date of Note	2010-04
Maturity Date	
Repayment Terms	Principal payable 1/1 each year Interest Payable 1/1 and 7/1 each year
Interest Rate	
Security Provided by Borrower	Fixed Rate Revenue Bonds
Purpose of Loan	For the Purchase and COstruction of New Building
Description of Lender Consideration	Cash
Consideration FMV	14900000

TY 2016 Other Assets Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Lilly Trusts-Beneficial Interest	8,512,522	6,443,499	6,443,499

TY 2016 Other Decreases Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Description	Amount
Beneficial Interest change	99,000

TY 2016 Other Expenses Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Equipment Rental and Maintenance	3,858	0	0	3,858
Advertising	411,989	0	235,737	169,595
Office Supplies	37,620	392	7,259	29,803
Telephone	4,461	69	69	4,534
Postage and Messenger	24,396	0	978	23,496
Books/CDs	11,925	0	24	14,462
Computer Website Maintenance	307,453	1,198	1,198	298,981
Office Insurance	73,924	1,140	1,140	79,011
Audio & Video Recording	26,896	0	70	26,826
Bad Debt	6,023	0	6,023	0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank & Inv Fees	172,786	141,292	155,753	17,034
Dues/Membership	23,289		931	20,258
Recruitment	5,093			5,093
Other Expenses from LP	456,204	456,204	456,204	
General and Administrative	15,272		67	15,205

TY 2016 Other Income Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Earned Subscription Revenue	470,896		470,896
Single Copy Sale Income	4,280		4,280
Distributor Gross Sales	52,628		52,628
Advertising Income	23,880		23,880
Royalty Revenue	24,208	24,208	24,208
Miscellaneous Income	47,198	8,109	8,609
Sale of Mail Lists	8,308		8,308
Digital Subscriptions - Earned	8,318		8,318
Income From LP Investments	204,107	204,107	204,107
Excluded Income From Unrelated Business (UBI)		118,811	118,811

TY 2016 Other Increases Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Description	Amount
Unrealized gains in investments	8,889,226
Timing of LP investments	514,904

TY 2016 Other Professional Fees Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Consultants-Other	300,047	0	10,192	296,270
Consultants-Editorial	22,216	0	0	22,216
Consultants-Audio	92,215	0	0	92,215
Consultants-Advertising	18,290	0	18,290	0
Consultants-Video	66,100	0	0	66,100
Reader/Judge	35,350	0	0	35,350
Speaker/Performers	171,454	0	0	171,454
Investment Advisor Fees	78,000	78,000	78,000	0

TY 2016 Taxes Schedule**Name:** The Poetry Foundation**EIN:** 36-2490808**Software ID:** 16000421**Software Version:** 2016v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Social Security/Medicare	133,712	2,506	6,684	127,028
Tax Expense	114,695	114,695	114,695	0

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 <u>www.irs.gov/form990</u>	OMB No 1545-0047 2016
	Name of the organization The Poetry Foundation	Employer identification number 36-2490808

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
--	---

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	Alan B Slifka Foundation	\$ 5,000	Person ☒
	477 Madison Ave 9th Fl		Payroll ☐
	New York, NY10022		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
2	Mid-Atlantic Art Foundation	\$ 9,235	Person ☒
	201 N Charles St Ste 401		Payroll ☐
	Baltimore, MD21201		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	The Andrew W Mellon Foundation	\$ 150,000	Person ☒
	140 E 62nd St		Payroll ☐
	New York, NY10065		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)

Employer identification number

36-2490808

Part II	Noncash Property
----------------	-------------------------

[illegible]

Name of organization

The Poetry Foundation

Employer identification number

36-2490808

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	
	_____	_____	_____
	_____	_____	_____
	(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	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	