

Form **990**Department of the Treasury
Internal Revenue Service**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

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

▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Open to Public Inspection

A For the 2016 calendar year, or tax year beginning

and ending

B Check if applicable

- ☐ Address change
☒ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization**Menorah Heritage Foundation**

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

5801 W 115th Street

Room/suite

104

City or town, state or province, country, and ZIP or foreign postal code

Overland Park, KS 66211**F** Name and address of principal officer **Rita Cortes****5801 W 115th Street, Suite 104, Overland park****D** Employer identification number**46-1165316****E** Telephone number**9133278245****G** Gross receipts \$**1,844,539.****H(a)** Is this a group return

for subordinates?

☐ Yes☒ No**H(b)** Are all subordinates included?☐ Yes☐ No

If "No," attach a list. (see instructions)

H(c) Group exemption number ▶**I** Tax-exempt status ☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ **N/A****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **2012****M** State of legal domicile: **KS****Part I Summary**

Activities & Governance

1 Briefly describe the organization's mission or most significant activities **To support other charitable organizations described in section 501(c)(3), specifically including****2** Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets**3** Number of voting members of the governing body (Part VI, line 1a)**3****33****4** Number of independent voting members of the governing body (Part VI, line 1b)**4****33****5** Total number of individuals employed in calendar year 2016 (Part V, line 2a)**5****0****6** Total number of volunteers (estimate if necessary)**6****0****7a** Total unrelated business revenue from Part VIII, column (C), line 12**7a****0.****b** Net unrelated business taxable income from Form 990-T, line 34**7b****0.**

Revenue

8 Contributions and grants (Part VIII, line 1h)

Prior Year

Current Year

8**0.****44,994.****9** Program service revenue (Part VIII, line 2g)**9****0.****0.****10** Investment income (Part VIII, column (A), lines 3, 4, and 7d)**10****2,717,755.****1,799,545.****11** Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)**11****0.****0.****12** Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)**12****2,717,755.****1,844,539.**

Expenses

13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)**13****1,658,568.****2,190,415.****14** Benefits paid to or for members (Part IX, column (A), line 4)**14****0.****0.****15** Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)**15****0.****0.****16a** Professional fundraising fees (Part IX, column (A), line 11e)**16a****0.****0.****b** Total fundraising expenses (Part IX, column (D), line 25) ▶**0.****17** Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)**17****348,924.****538,659.****18** Total expenses - Add lines 13-17 (must equal Part IX, column (A), line 25)**18****2,007,492.****2,729,074.****19** Revenue less expenses - Subtract line 18 from line 12**19****710,263.****<884,535.>**

Net Assets or Fund Balances

20 Total assets (Part X, line 16)

Beginning of Current Year

End of Year

20**35,161,638.****53,246,349.****21** Total liabilities (Part X, line 26)**21****4,235.****5,448.****22** Net assets or fund balances - Subtract line 21 from line 20**22****35,157,403.****53,240,901.****Part II Signature Block**

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 officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer

Date

Rita Cortes, Executive Director

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Stanley H. House**08/22/17****P00642974**Firm's name ▶ **House Park Dobratz & Wiebler, P.C.**Firm's EIN ▶ **43-1562209**Firm's address ▶ **605 W. 47th Street, Suite 301**Phone no. **816-931-3393****Kansas City, MO 64112**

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes☐ No

832001 11-11-16

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2016)

See Schedule O for Organization Mission Statement Continuation

650

4

SCANNED SEP 26 2017

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

☒ X**1** Briefly describe the organization's mission.

The Organization is designed to provide support for other charitable organizations as described in section 501 (c) and section 509 (a) of the Internal Revenue Code. The Organization is exclusively for charitable, educational or religious purposes. It supports activities

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code _____) (Expenses \$ 2,190,415. including grants of \$ 2,190,415.) (Revenue \$ _____)

Provided support for charitable organizations which serve human needs by advancing constructive projects

4b (Code _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4c (Code _____) (Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4d Other program services (Describe in Schedule O.)

(Expenses \$ _____ including grants of \$ _____) (Revenue \$ _____)

4e Total program service expenses 2,190,415.

Form 990 (2016)

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>		X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		X
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>		X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>		X
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	X	
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X

Form 990 (2016)

Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	X	
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions).		
a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations?		X
If "Yes," complete Schedule N, Part I		
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1	X	
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?	X	

Note. All Form 990 filers are required to complete Schedule O

Form 990 (2016)

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	0	
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	0	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country: <u>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)</u>		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b	

Form 990 (2016)

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI ☒

Section A. Governing Body and Management

	1a	1b	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	33			
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.				
b Enter the number of voting members included in line 1a, above, who are independent		33		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X	
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?	3			X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4			X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?	5			X
6 Did the organization have members or stockholders?	6		X	
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X	
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X	
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a The governing body?	8a		X	
b Each committee with authority to act on behalf of the governing body?	8b		X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O.	9			X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Did the organization have local chapters, branches, or affiliates?		X
b If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?		
10b		
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?		X
b Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13	X	
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	X	
12c		
13 Did the organization have a written whistleblower policy?		X
14 Did the organization have a written document retention and destruction policy?		X
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official		X
b Other officers or key employees of the organization		X
If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?		
16b		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed **None**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

☐ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records: **Jewish Community Foundation of Greater KC - 913-327-8134**
5801 W 115th Street, Suite 104, Overland Park, KS 66211

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) Diane Azorsky Vice President	1.00	X		X				0.	0.	0.
(2) Loren Berenbom Trustee	1.00	X						0.	0.	0.
(3) Diane Federman Trustee	1.00	X						0.	0.	0.
(4) Michelle Goldsmith Trustee	1.00	X						0.	0.	0.
(5) Edward Goldstein Trustee	1.00	X						0.	0.	0.
(6) Frank Lipsman Trustee	1.00	X						0.	0.	0.
(7) Jeff Mallin Trustee	1.00	X						0.	0.	0.
(8) Howard Mayer Vice President	1.00	X		X				0.	0.	0.
(9) Carol Porter Trustee	1.00	X						0.	0.	0.
(10) Bob Shaw Trustee	1.00	X						0.	0.	0.
(11) Scott Slabotsky Treasurer	1.00	X		X				0.	0.	0.
(12) Tom Barnett Trustee	1.00	X						0.	0.	0.
(13) Bob Grant Trustee	1.00	X						0.	0.	0.
(14) Andrew Kaplan Secretary	1.00	X		X				0.	0.	0.
(15) Sharon Lofspring Vice President	1.00	X		X				0.	0.	0.
(16) Barbara MacArthur Trustee	1.00	X						0.	0.	0.
(17) Frank Sterneck Trustee	1.00	X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) Dan Stolper Trustee	1.00	X						0.	0.	0.
(19) Ann Darke Trustee	1.00	X						0.	0.	0.
(20) John Goldberg Exec. Vice President	1.00	X		X				0.	0.	0.
(21) Jeffrey Kramer Trustee	1.00	X						0.	0.	0.
(22) Marjorie Robinow Trustee	1.00	X						0.	0.	0.
(23) Brian Scharf Trustee	1.00	X						0.	0.	0.
(24) Nola Adebo Vice President	1.00	X		X				0.	0.	0.
(25) Stanley Brand Trustee	1.00	X						0.	0.	0.
(26) Stevi Brick Trustee	1.00	X						0.	0.	0.
1b Sub-total								0.	0.	0.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								0.	0.	0.

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

- 3 Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual
- 4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual
- 5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

	Yes	No
3		X
4		X
5		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **0**

See Part VII, Section A Continuation sheets

Form 990 (2016)

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514	
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a					
	b	Membership dues	1b					
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	44,994.				
	g	Noncash contributions included in lines 1a-1f \$						
	h	Total. Add lines 1a-1f		44,994.				
Program Service Revenue	Business Code							
	2 a							
	b							
	c							
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f						
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		782,458.			782,458.	
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
	6 a	Gross rents	(i) Real	(ii) Personal				
		b	Less: rental expenses					
		c	Rental income or (loss)					
		d	Net rental income or (loss)					
	7 a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other	1,017,087.			
		b	Less: cost or other basis and sales expenses		0.			
		c	Gain or (loss)		1,017,087.			
		d	Net gain or (loss)		1,017,087.			1,017,087.
	8 a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a					
		b	Less: direct expenses	b				
		c	Net income or (loss) from fundraising events					
		9 a	Gross income from gaming activities. See Part IV, line 19	a				
	b		Less: direct expenses	b				
	c		Net income or (loss) from gaming activities					
	10 a		Gross sales of inventory, less returns and allowances	a				
		b	Less: cost of goods sold	b				
		c	Net income or (loss) from sales of inventory					
Miscellaneous Revenue								
11 a		Business Code						
	b							
	c							
	d	All other revenue						
	e	Total. Add lines 11a-11d						
12	Total revenue. See instructions.			1,844,539.	0.	0.	1,799,545.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX

☒ X

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,190,415.	2,190,415.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees				
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	147,661.		147,661.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	296,294.		296,294.	
12 Advertising and promotion				
13 Office expenses	13,915.		13,915.	
14 Information technology	5,646.		5,646.	
15 Royalties				
16 Occupancy	5,199.		5,199.	
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	2,084.		2,084.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	3,570.		3,570.	
23 Insurance	8,404.		8,404.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Decrease in cash value	54,363.		54,363.	
b Strategic planning	1,523.		1,523.	
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	2,729,074.	2,190,415.	538,659.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

Part X Balance SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	41,787.	1	92,560.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	17,490.
	10a Land, buildings, and equipment cost or other basis. Complete Part VI of Schedule D	10a 34,983.		
	b Less: accumulated depreciation	10b 17,535.	10c 13,643.	17,448.
	11 Investments - publicly traded securities	35,106,208.	11	52,920,462.
	12 Investments - other securities. See Part IV, line 11		12	198,389.
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11		15	
16 Total assets. Add lines 1 through 15 (must equal line 34)	35,161,638.	16	53,246,349.	
Liabilities	17 Accounts payable and accrued expenses	4,235.	17	5,448.
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D		25	
	26 Total liabilities. Add lines 17 through 25	4,235.	26	5,448.
	Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here ☒ and complete lines 27 through 29, and lines 33 and 34.		
27 Unrestricted net assets		35,157,403.	27	53,240,901.
28 Temporarily restricted net assets			28	
29 Permanently restricted net assets			29	
Organizations that do not follow SFAS 117 (ASC 958), check here ☐ and complete lines 30 through 34.				
30 Capital stock or trust principal, or current funds			30	
31 Paid-in or capital surplus, or land, building, or equipment fund			31	
32 Retained earnings, endowment, accumulated income, or other funds			32	
33 Total net assets or fund balances		35,157,403.	33	53,240,901.
34 Total liabilities and net assets/fund balances		35,161,638.	34	53,246,349.

Form 990 (2016)

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	1,844,539.
2	Total expenses (must equal Part IX, column (A), line 25)	2	2,729,074.
3	Revenue less expenses. Subtract line 2 from line 1	3	<884,535.>
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	35,157,403.
5	Net unrealized gains (losses) on investments	5	1,587,781.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	17,380,252.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	53,240,901.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

☐

- 1 Accounting method used to prepare the Form 990. ☐ Cash ☒ Accrual ☐ Other _____
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:
☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis
- b Were the organization's financial statements audited by an independent accountant?
If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:
☐ Separate basis ☒ Consolidated basis ☐ Both consolidated and separate basis
- c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?
If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Form 990 (2016)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.

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

OMB No 1545-0047

2016

Open to Public
Inspection

Name of the organization

Menorah Heritage Foundation

Employer identification number

46-1165316

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E (Form 990 or 990-EZ).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions) Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 12 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)** See **section 509(a)(3)**. Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a ☒ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
 - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

1

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Jewish Community Foundation of Great	43-6049281	7	X		0.	
Total					0.	0.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ. 632021 09-21-16 Schedule A (Form 990 or 990-EZ) 2016

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2016 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2015 Schedule A, Part II, line 14	15	%
16a 33 1/3% support test - 2016. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☐	
b 33 1/3% support test - 2015. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☐	
17a 10% -facts-and-circumstances test - 2016. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	☐	
b 10% -facts-and-circumstances test - 2015. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization	☐	
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	☐	

Schedule A (Form 990 or 990-EZ) 2016

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2012	(b) 2013	(c) 2014	(d) 2015	(e) 2016	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐**Section C. Computation of Public Support Percentage**

15 Public support percentage for 2016 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2015 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2016 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2015 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2016. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐b 33 1/3% support tests - 2015. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

Part IV Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.
- b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.
- b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- b **Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c **Substitutions only.** Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI.
- b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.
- c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer 10b below.
- b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

	Yes	No
1	X	
2		X
3a		X
3b		
3c		
4a		X
4b		
4c		
5a		X
5b		
5c		
6		X
7		X
8		X
9a		X
9b		X
9c		X
10a		X
10b		

Part IV Supporting Organizations (continued)

11 Has the organization accepted a gift or contribution from any of the following persons?

- a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?
- b A family member of a person described in (a) above?
- c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.

	Yes	No
11a		X
11b		X
11c		X

Section B. Type I Supporting Organizations

- 1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.
- 2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.

	Yes	No
1	X	
2		X

Section C. Type II Supporting Organizations

- 1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).

	Yes	No
1		

Section D. All Type III Supporting Organizations

- 1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?
- 2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).
- 3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.

	Yes	No
1		
2		
3		

Section E. Type III Functionally Integrated Supporting Organizations

- 1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).
- a ☐ The organization satisfied the Activities Test. Complete line 2 below.
- b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.
- c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).
- 2 Activities Test. Answer (a) and (b) below.
- a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
- b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.
- 3 Parent of Supported Organizations. Answer (a) and (b) below.
- a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.
- b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.

	Yes	No
2a		
2b		
3a		
3b		

Part V. Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI) See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI)		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	☐ Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions)		

Schedule A (Form 990 or 990-EZ) 2016

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions	
7 Total annual distributions. Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions	
9 Distributable amount for 2016 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2016	(iii) Distributable Amount for 2016
1 Distributable amount for 2016 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2016 (reasonable cause required- explain in Part VI). See instructions			
3 Excess distributions carryover, if any, to 2016:			
a			
b			
c From 2013			
d From 2014			
e From 2015			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2016 distributable amount			
i Carryover from 2011 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2016 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2016 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2016, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions			
6 Remaining underdistributions for 2016. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions			
7 Excess distributions carryover to 2017. Add lines 3j and 4c			
8 Breakdown of line 7:			
a			
b Excess from 2013			
c Excess from 2014			
d Excess from 2015			
e Excess from 2016			

Schedule A (Form 990 or 990-EZ) 2016

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information (See instructions.)

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization

Menorah Heritage Foundation

Employer identification number
46-1165316

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		☐ Yes ☐ No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or education)	☐ Preservation of a historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶

4 Number of states where property subject to conservation easement is located ▶

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ \$

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ \$

(ii) Assets included in Form 990, Part X ▶ \$

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ \$

b Assets included in Form 990, Part X ▶ \$

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2016

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a ☐ Public exhibition
b ☐ Scholarly research
c ☐ Preservation for future generations
d ☐ Loan or exchange programs
e ☐ Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements. Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

- c Beginning balance
d Additions during the year
e Distributions during the year
f Ending balance

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- a Board designated or quasi-endowment ☐ %
b Permanent endowment ☐ %
c Temporarily restricted endowment ☐ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

- (i) unrelated organizations
(ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

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

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		18,955.	7,207.	11,748.
d Equipment		16,028.	10,328.	5,700.
e Other				
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				17,448.

Schedule D (Form 990) 2016

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation. Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)		

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation. Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)		

Part IX Other Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII ☒

Schedule D (Form 990) 2016

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1		3
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1		3
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5

Part XIII Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Part X, Line 2:

The Foundation is exempt from federal income tax under section 501(c)(3) of the Internal Revenue Code. The Foundation's policy is to provide liabilities for uncertain tax provisions when a liability is probable and estimable. The Foundation has no uncertain income tax positions for the years ended December 31, 2016 and 2015. The Foundation is no longer subject to audits by the IRS for years prior to 2013. Management is not aware of any violation of its tax status as an organization exempt from income taxes.

Part XIII Supplemental Information *(continued)*

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► Attach to Form 990.

► Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2016



Name of the organization

Menorah Heritage Foundation

Employer identification number
46-1165316

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Alphapointe Association for the Blind - 7501 Prospect - Kansas City, MO 64132	44-0552486	501(c)(3)	10,000.	0.			Grant to fund low vision service for seniors
ArtsTech 1522 Holmes Street Kansas City, MO 64108	43-1013392	501(c)(3)	8,000.	0.			Grant to improve technology, add office computers, smart boards, and software
B'nai B'rith Youth Organization 5801 West 115th St. Suite 107 Overland Park, KS 66211	31-1794932	501(c)(3)	10,000.	0.			Grant for core funding
Cancer Action 10520 Barkley Suite 100 Overland Park, KS 66212	48-0650257	501(c)(3)	9,500.	0.			Grant for rent for eastern Jackson County office
CASA of Jackson County 2544 Holmes Kansas City, MO 64108	43-1401328	501(c)(3)	10,000.	0.			Grant to offset our health insurance costs, which have grown substantially i
Catholic Charities of Northeast Kansas - 9720 W. 87th Street - Overland Park, KS 66212	48-1181305	501(c)(3)	7,500.	0.			Grant to support Aging in Place and/or Aging in Community, foster grandparen

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

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) (2016)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Children's Place Two East 59th St. Kansas City, MO 64113	51-0195216	501(c)(3)	10,000.	0.			Grant for transportation for day treatment
Christmas in October 3261 Roanoke Kansas City, MO 64111	43-1431964	501(c)(3)	15,000.	0.			Grant to help with cost of renovations and repairs for older adults
Community Assistance Council Inc. 10901 Blue Ridge Blvd Kansas City, MO 64134	23-7439079	501(c)(3)	10,000.	0.			Grant for rent and telephones
Community Linc 4012-14 Troost Kansas City, MO 64110	43-1506591	501(c)(3)	10,000.	0.			Grant for maintenance and usage costs of housing units
Community Services League 404 North Noland Road Independence, MO 64050	43-0976396	501(c)(3)	8,000.	0.			Grant to offset costs of Internet connectivity and voice-over IP telephones
Coversa 1317 W. 13th Terrace Suite 3A Kansas City, MO 64102	43-1918057	501(c)(3)	9,375.	0.			Grant for Data Collection to identify geographical "hot spots"
Cross-Lines Community Outreach 736 Shawnee Ave. Kansas City, KS 66105	48-0697177	501(c)(3)	10,000.	0.			Grant for computers, software and information technology services for Cross-
Cultivate KC 4223 Gibbs Road Kansas City, KS 66106	20-2365320	501(c)(3)	20,000.	0.			Grant for DoubleUp Funding for Seniors
Don Bosco Center 580 Campbell St. Kansas City, MO 64106-1273	44-0558260	501(c)(3)	20,000.	0.			Grant to support Aging in Place and/or Aging in Community

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Gillis Center 8150 Wornall Road Kansas City, MO 64114	43-1765826	501(c)(3)	10,000.	0.			Grant for help with Sanctuary Model of Trauma-informed Care Training Costs
Good Samaritan Project 3030 Walnut Kansas City, MO 64108	43-1343144	501(c)(3)	8,000.	0.			Grant to replace costly fluorescent lighting system with energy-efficient LE
Growing Futures Early Education Centers, Head Start - 8155 Sante Fe Drive - Overland Park, KS 66204	48-0723044	501(c)(3)	10,000.	0.			Grant for support to help with high cost of facility rent
Hyman Brand Hebrew Academy 5801 West 115th Street Overland Park, KS 66211	48-6125262	501(c)(3)	38,110.	0.			Grant for Jewish Studies and Hebrew Learning Specialist
Hyman Brand Hebrew Academy 5801 West 115th Street Overland Park, KS 66211	48-6125262	501(c)(3)	10,000.	0.			Grant for Melton School
Hyman Brand Hebrew Academy 5801 West 115th Street Overland Park, KS 66211	48-6125262	501(c)(3)	75,000.	0.			Grant for financial aid
Hyman Brand Hebrew Academy 5801 West 115th Street Overland Park, KS 66211	48-6125262	501(c)(3)	5,000.	0.			Grant for Melton HBHA
Jewish Community Campus 5801 W. 115th Street Overland Park, KS 66211	43-1392330	501(c)(3)	3,811.	0.			Grant for ROE
Jewish Community Campus 5801 W. 115th Street Overland Park, KS 66211	43-1392330	501(c)(3)	75,000.	0.			Grant for ROE subsidy

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Jewish Community Campus 5801 W. 115th Street Overland Park, KS 66211	43-1392330	501(c)(3)	3,811.	0.			Grant for ROE
Jewish Community Campus 5801 W. 115th Street Overland Park, KS 66211	43-1392330	501(c)(3)	75,000.	0.			Grant for ROE
Jewish Community Center 5801 W. 115th Street Overland Park, KS 66211	44-0545992	501(c)(3)	9,444.	0.			Grant for paddle board therapy
Jewish Community Center 5801 W. 115th Street Overland Park, KS 66211	44-0545992	501(c)(3)	112,500.	0.			Grant for Heritage Center
Jewish Community Center 5801 W. 115th Street Overland Park, KS 66211	44-0545992	501(c)(3)	20,000.	0.			Grant for Jewish Life & Learning
Jewish Community Center 5801 W. 115th Street Overland Park, KS 66211	44-0545992	501(c)(3)	112,500.	0.			Grant for the Heritage Center
Jewish Community Relations Bureau 1 AJC - 5801 West 115th St. Suite 203 - Overland Park, KS 66211	44-0545913	501(c)(3)	15,244.	0.			Core grant
Jewish Community Relations Bureau 1 AJC - 5801 West 115th St. Suite 203 - Overland Park, KS 66211	44-0545913	501(c)(3)	7,500.	0.			Grant for Core funding
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	25,000.	0.			Grant for Chaplaincy

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II)							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	35,245.	0.			Grant for Food, Shelter, and Healthcare
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	18,500.	0.			Grant for Older Adult Care Management
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	5,000.	0.			Grant for CHAI
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	37,500.	0.			Grant for Mental Health Services
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	5,717.	0.			Grant for Jewish Millennial Initiative
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	10,000.	0.			Grant for Help@Home
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	77,500.	0.			Grant for Older Adult Care Management
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	11,000.	0.			Grant for Chaplaincy
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	9,000.	0.			Grant for Child and Family Counseling

Schedule I (Form 990)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	15,000.	0.			Grant for Food and Shelter
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	16,500.	0.			Grant for Food Pantry
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	9,000.	0.			Grant for Help@Home
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	7,500.	0.			Grant for Millennial Initiative
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	10,000.	0.			Grant for rent for expanded MO food pantry
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	25,000.	0.			Grant for the Chaplaincy program
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	11,000.	0.			Grant for the Chaplaincy program
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	35,245.	0.			Grant for food, shelter and healthcare
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	15,000.	0.			Grant for food, shelter, and healthcare

Schedule I (Form 990)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	18,500.	0.			Grant for older adult care mgmt
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	77,500.	0.			Grant for older adult care mgmt
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	5,000.	0.			Grant for CHAI
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	37,500.	0.			Grant for mental health services
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	16,500.	0.			Grant for food pantry
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	9,000.	0.			Grant for child and family counseling
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	5,717.	0.			Grant for Jewish Millennial Initiative
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	7,500.	0.			Grant for Jewish Millennial Initiative
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	10,000.	0.			Grant for Help @ Home

Schedule I (Form 990)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	9,000.	0.			Grant for Help @ Home
Jewish Family Services (JFS) 5801 W. 115th Street Suite 103 Overland Park, KS 66211	44-0545829	501(c)(3)	20,000.	0.			Grant for allied Older Adult Services
Jewish Federation of Greater Kansas City - 5801 W. 115th Street Suite 201 - Overland Park, KS 66211	44-0545913	501(c)(3)	12,500.	0.			Grant for Sasone
Jewish Federation of Greater Kansas City - 5801 W. 115th Street Suite 201 - Overland Park, KS 66211	44-0545913	501(c)(3)	40,000.	0.			Grant for Sasone
Jewish Federation of Greater Kansas City - 5801 W. 115th Street Suite 201 - Overland Park, KS 66211	44-0545913	501(c)(3)	50,000.	0.			Grant to 5-year fund for Campus Security and Community Security Director
Jewish Federation of Greater Kansas City - 5801 W. 115th Street Suite 201 - Overland Park, KS 66211	44-0545913	501(c)(3)	12,500.	0.			Grant for Sasone
Jewish Federation of Greater Kansas City - 5801 W. 115th Street Suite 201 - Overland Park, KS 66211	44-0545913	501(c)(3)	40,000.	0.			Grant for Sasone
Jewish Vocational Services 4600 The Paseo Kansas City, MO 64110	44-0545994	501(c)(3)	25,000.	0.			Grant for Career Skills & Connections
JobOne 1085 South Yuma Avenue Independence, MO 64056	43-0922133	501(c)(3)	9,056.	0.			Grant for router purchase for Agency Connectivity

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Kansas City Anti-Violence Project PO BOX 411211 Kansas City, MO 64141	77-0595867	501(c)(3)	10,000.	0.			Grant for support for the LGBTQ Victim Services Center Expansion and Passage
Kansas City CARE Clinic 3515 Broadway Kansas City, MO 64111	43-0967292	501(c)(3)	10,000.	0.			Grant for audit
Metropolitan Lutheran Ministry 3031 Holmes Kansas City, MO 64109-1435	43-0970991	501(c)(3)	15,000.	0.			Grant for the Senior Commodities Program, and the Minor Home Repair Program
Mid America Regional Council 600 Broadway #200 Kansas City, MO 64105	20-1824454	501(c)(3)	25,000.	0.			Grant for KC Communities for All Ages
Midwest Center for Holocaust Education - 5801 W. 115th St. - Overland Park, KS 66211	48-1127376	501(c)(3)	7,622.	0.			Grant for school outreach/teacher education
Midwest Center for Holocaust Education - 5801 W. 115th St. - Overland Park, KS 66211	48-1127376	501(c)(3)	7,500.	0.			Grant for Core-audit
Moishe Foundation c/o Jena Coen Charlotte, NC 28226	26-2599786	501(c)(3)	10,000.	0.			Grant for Kansas City Moishe House
Moishe Foundation c/o Jena Coen Charlotte, NC 28226	26-2599786	501(c)(3)	10,000.	0.			Grant for Moishe House KC
Mother's Refuge attn: Robert Zornes Independence, MO 64055	43-1454628	501(c)(3)	8,000.	0.			Grant for utilities at the shelter

Schedule I (Form 990)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
National Council of Jewish Women 5311 W. 75th Street Prairie Village, KS 66208	13-1641076	501(c)(3)	10,000.	0.			Grant to buy clothing and supplies for July, 2017 Back to School Store
Northland Neighborhoods Inc. 4420 NE Chouteau Trafficway Kansas City, MO 64117	43-1746357	501(c)(3)	10,000.	0.			Grant to support Aging in Place and/or Aging in Community
Northwest Communities Development Corp. - 217 S. Cedar Ave. - Independence, MO 64053	43-1822719	501(c)(3)	10,000.	0.			Grant for the Senior Center technology
Platte Senior Services, Inc. 11724 NW Plaza Circle Suite 700 Kansas City, MO 64153	43-1255220	501(c)(3)	20,000.	0.			Grant to support Aging in Place and/or Aging in Community
Rabbinical Association of Greater Kansas City - 5801 West 115th St. Box 113 - Overland Park, KS 66211-1800	76-0710693	501(c)(3)	10,000.	0.			Grant for Core - Part time Coord.
Rabbinical Association of Greater Kansas City - 5801 West 115th St. Box 113 - Overland Park, KS 66211-1800	76-0710693	501(c)(3)	10,000.	0.			Grant for Community Conversion Class
Reconciliation Services 3101 Troost Ave. Kansas City, MO 64109	36-4580402	501(c)(3)	15,000.	0.			Grant to support case management, foster grandparents, and wrap around servi
reStart 918 East 9th St Kansas City, MO 64106	43-1349378	501(c)(3)	10,000.	0.			Grant for utilities at main facility and adjacent Family Shelter
Riverview Health Services, Inc. 722 Reynolds Ave Kansas City, KS 66101	48-1072716	501(c)(3)	8,000.	0.			Grant to support costs related to accounting, payroll, and audit

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Rose Brooks Center P.O. Box 320599 Kansas City, MO 64132-0599	51-0231573	501(c)(3)	10,000.	0.			Grant for utilities for shelter
Safehome Inc. P.O. Box 4563 Overland Park, KS 66204	48-0917798	501(c)(3)	10,000.	0.			Grant to offset core operating costs of SAFEHOME's emergency shelter - speci
SAVE Inc. PO Box 45301 Kansas City, MO 64171	43-1465268	501(c)(3)	10,000.	0.			Grant for health benefits and insurance for staff
Shepherd's Center of Kansas City Central - 5200 Oak Street - Kansas City, MO 64112	43-0994417	501(c)(3)	20,000.	0.			Grant to support Aging in Place and/or Aging in Community
Shepherd's Center of KCK 757 Armstrong Ave. Kansas City, KS 66101	48-1039483	501(c)(3)	13,000.	0.			Grant to support Aging in Place and/or Aging in Community
Shepherd's Center of Raytown 7900 Blue Ridge Blvd Raytown, MO 64138	43-1531153	501(c)(3)	15,000.	0.			Grant to support Aging in Place and/or Aging in Community
Shepherd's Center of the Northland 4805 Northeast Antioch Road Kansas City, MO 64119	43-1567162	501(c)(3)	20,000.	0.			Grant to support Aging in Place and/or Aging in Community
Southwest Boulevard Family Health Care Inc. - Family Health Care - Kansas City, KS 66103	48-1067752	501(c)(3)	10,000.	0.			Grant to offset the cost of utilities
St. Lukes Hospital Foundation 4225 Baltimore Ave Kansas City, MO 64111-2304	44-6014699	501(c)(3)	3,000.	0.			Grant for Nursing Scholarship

Schedule I (Form 990)

Schedule I (Form 990) **Menorah Heritage Foundation**

46-1165316

Page 1

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
St. Lukes Hospital Foundation 4225 Baltimore Ave Kansas City, MO 64111-2304	44-6014699	501(c)(3)	25,000.	0.			Grant for the Purple Clinic
St. Lukes Hospital Foundation 4225 Baltimore Ave Kansas City, MO 64111-2304	44-6014699	501(c)(3)	3,000.	0.			Grant for nursing scholarships
Synergy Services Inc. 400 E. Sixth Street Parkville, MO 64152	43-0970674	501(c)(3)	10,000.	0.			Grant to purchase and install new Children's Center Campus security and came
Torah Learning Center 8800 West 103rd St. Overland Park, KS 66212	43-1772532	501(c)(3)	10,000.	0.			Grant for KMOW
Torah Learning Center 8800 West 103rd St. Overland Park, KS 66212	43-1772532	501(c)(3)	12,000.	0.			Grant for Kosher Meals on Wheels
Turner House Clinic Inc. 21 North 12th Street Suite 300 Kansas City, KS 66102	48-1151382	501(c)(3)	10,000.	0.			Grant for user license for eClinicalWorks and Open Dental
University of Kansas Hillel Foundation - 722 New Hampshire - Lawrence, KS 66044	52-1844823	501(c)(3)	30,000.	0.			Grant for Mental Health/Pastoral Counseling
University of Kansas Hillel Foundation - 722 New Hampshire - Lawrence, KS 66044	52-1844823	501(c)(3)	20,000.	0.			Grant for Student Leadership
University of Kansas Hillel Foundation - 722 New Hampshire - Lawrence, KS 66044	52-1844823	501(c)(3)	12,000.	0.			Grant for Shabbat Engagement

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)							
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Village Shalom Charitable (Do not use) - 5500 W. 123rd St. - Overland Park, KS 66209	48-1205323	501(c)(3)	30,000.	0.			Grant for financial assistance
Village Shalom Charitable (Do not use) - 5500 W. 123rd St. - Overland Park, KS 66209	48-1205323	501(c)(3)	35,000.	0.			Grant for Financial Assistance
Village Shalom Charitable (Do not use) - 5500 W. 123rd St. - Overland Park, KS 66209	48-1205323	501(c)(3)	1,000.	0.			Grant for Village Shalom Campus Expansion campaign
Village Shalom Inc. 5500 W. 123rd St. Overland Park, KS 66209	48-1199065	501(c)(3)	30,000.	0.			Grant for Financial Assistance
Village Shalom Inc. 5500 W. 123rd St. Overland Park, KS 66209	48-1199065	501(c)(3)	35,000.	0.			Grant for Financial Assistance
Village Shalom Inc. 5500 W. 123rd St. Overland Park, KS 66209	48-1199065	501(c)(3)	25,000.	0.			Grant for indigent care

Part III

Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance

Part IV

Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Part I, Line 2:

The Menorah Heritage Foundation supports the Jewish Community Foundation of Greater Kansas City (referred to below as "Foundation"), which provides development, administrative, grant-making and educational services.

Following is a description of the process followed by the foundation in its grants monitoring: before a grant is issued from any fund, the Foundation's staff reviews the grant recommendation for appropriateness, checking for such issues as the risk of personal benefit, proper authorization and grant approval. If necessary, staff will contact the fund representative to

Part IV Supplemental Information

clarify those requests that might appear to involve personal benefits. As a safeguard, grants to charities that are known to provide benefits to their donors are sent with an accompanying letter warning the grantee that no personal benefits can be provided to anyone in exchange for the grant. If it comes the knowledge of the staff that a personal benefit was provided, then a grant refund is requested. Grant letters also specify the purpose of the grant, and where appropriate, the reporting responsibilities of the grantee. These reports are used to determine whether the grantee used the funds in the manner requested. the Foundation maintains a list of approved grantees that have had their 501(c)(3) status verified either by the IRS website list of charities or by written documentation received from the charity.

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

2016

Open to Public
Inspection

Name of the organization

Menorah Heritage Foundation

Employer identification number
46-1165316

Form 990, Part I, Line 1, Description of Organization Mission:

the Jewish Community Foundation of Greater Kansas City.

Form 990, Item B

In April, 2016 the Jewish Heritage Foundation Supporting Organization
(the Foundation) merged with the Menorah Legacy Foundation and the
Foundation changed its name to the Menorah Heritage Foundation. A
certified copy of the Plan and Agreement of Merger filed with the State
of Kansas is attached to the Form 990.

Form 990, Part III, Line 1, Description of Organization Mission:

for the benefit of, performs the functions of, or carries out the
purpose of the Jewish Community Foundation of Greater Kansas City.

Form 990, Part VI, Section A, line 2:

Howard Mayer and Diane Azorsky are brother/sister
Merilyn Berebom and Sanford Krigel are cousins

Form 990, Part VI, Section A, line 6:

See 7a explanation below

Form 990, Part VI, Section A, line 7a:

Members of the supporting foundation fall into one of two classes, those
representing the donor(s) and those representing the supported
organization. Members of the donor class are elected by the donor(s);

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule O (Form 990 or 990-EZ) (2016)

632211 08-25-16

Name of the organization

Menorah Heritage Foundation

Employer identification number

46-1165316

members of the supported organization class are elected by the supported organization. All members serve as trustees. The supported organization class must always have one more trustee than the donor class. At the annual meeting, the trustees elect officers to carry out the day to day business of the supporting organization. The term of service of officers is one year.

Form 990, Part VI, Section A, line 7b:

See 7a explanation below

Form 990, Part VI, Section B, line 11b:

The Form 990 is prepared by the Foundation's CPA and reviewed by the chief financial officer and executive director of the Jewish Community Foundation of Greater Kansas City.

Form 990, Part VI, Section B, Line 12c:

In May of each year the trustees are required to disclose on a form any organizations for which they or their spouses serve as trustees. In addition, before each vote to award grants, the trustees are asked to disclose whether they or their spouse serve on the grant applicant's board. Anyone who has such a conflict is asked not to vote.

Form 990, Part VI, Section C, Line 19:

COPIES OF GOVERNING DOCUMENTS AND FINANCIAL INFORMATION ARE AVAILABLE UPON REQUEST.

Form 990, Part IX, Line 11g, Other Fees:

Administration fees:

Name of the organization

Menorah Heritage Foundation

Employer identification number

46-1165316

Program service expenses	0.
Management and general expenses	61,056.
Fundraising expenses	0.
Total expenses	61,056.

Other professional fees:

Program service expenses	0.
Management and general expenses	17,310.
Fundraising expenses	0.
Total expenses	17,310.

Management and general:

Program service expenses	0.
Management and general expenses	217,928.
Fundraising expenses	0.
Total expenses	217,928.
Total Other Fees on Form 990, Part IX, line 11g, Col A	296,294.

Form 990, Part XI, line 9, Changes in Net Assets:

Merger with Menorah Legacy Foundation	17,380,252.
---------------------------------------	-------------

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

► **Attach to Form 990.**

► Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

Name of the organization

Menorah Heritage Foundation

Employer identification number
46-1165316

Part I

Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

[illegible]

Part II

Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

[illegible]

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2016

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?**a** Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity**b** Gift, grant, or capital contribution to related organization(s)**c** Gift, grant, or capital contribution from related organization(s)**d** Loans or loan guarantees to or for related organization(s)**e** Loans or loan guarantees by related organization(s)**f** Dividends from related organization(s)**g** Sale of assets to related organization(s)**h** Purchase of assets from related organization(s)**i** Exchange of assets with related organization(s)**j** Lease of facilities, equipment, or other assets to related organization(s)**k** Lease of facilities, equipment, or other assets from related organization(s)**l** Performance of services or membership or fundraising solicitations for related organization(s)**m** Performance of services or membership or fundraising solicitations by related organization(s)**n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)**o** Sharing of paid employees with related organization(s)**p** Reimbursement paid to related organization(s) for expenses**q** Reimbursement paid by related organization(s) for expenses**r** Other transfer of cash or property to related organization(s)**s** Other transfer of cash or property from related organization(s)**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

		(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)	Jewish Community Foundation of Greater KC	M	278,984	Cash paid	
(2)					
(3)					
(4)					
(5)					
(6)					

Part VII Supplemental Information.

Provide additional information for responses to questions on Schedule R. See instructions.