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EXTENDED TO NOVEMBER 15, 2017

Return of Private Foundation

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

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OMB No 1545-0052

2016

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2016 or tax year beginning

, and ending

Name of foundation WILLIAMSBURG COMMUNITY HEALTH FOUNDATION		A Employer identification number 54-1822359	
Number and street (or P O box number if mail is not delivered to street address) 4801 COURTHOUSE STREET		Room/suite 200	B Telephone number 757-345-0912
City or town, state or province, country, and ZIP or foreign postal code WILLIAMSBURG, VA 23188		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 116,524,152.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____			
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income
(c) Adjusted net income		(d) Disbursements for charitable purposes (cash basis only)	
1 Contributions, gifts, grants, etc., received			N/A
2 Check ☒ if the foundation is not required to attach Sch B			
3 Interest on savings and temporary cash investments			
4 Dividends and interest from securities		3,078,730.	3,074,331.
5a Gross rents			
b Net rental income or (loss)			
6a Net gain or (loss) from sale of assets not on line 10		1,989,283.	
b Gross sales price for all assets on line 6a 11,044,432.			
7 Capital gain net income (from Part IV, line 2)			1,953,014.
8 Net short-term capital gain			
9 Income modifications			
10a Gross sales less returns and allowances			
b Less Cost of goods sold			
c Gross profit or (loss)			
11 Other income		<917,569.>	<696,342.>
12 Total. Add lines 1 through 11		4,150,444.	4,331,003.
13 Compensation of officers, directors, trustees, etc		167,488.	0.
14 Other employee salaries and wages		559,094.	104,596.
15 Pension plans, employee benefits		222,819.	0.
16a Legal fees			
b Accounting fees STMT 3		46,321.	4,632.
c Other professional fees STMT 4		219,537.	203,551.
17 Interest			
18 Taxes STMT 5		6,863.	0.
19 Depreciation and depletion		13,840.	0.
20 Occupancy		145,258.	18,244.
21 Travel, conferences, and meetings		7,825.	0.
22 Printing and publications		10,243.	0.
23 Other expenses STMT 6		444,014.	0.
24 Total operating and administrative expenses. Add lines 13 through 23		1,843,302.	331,023.
25 Contributions, gifts, grants paid		4,517,282.	
26 Total expenses and disbursements. Add lines 24 and 25		6,360,584.	331,023.
27 Subtract line 26 from line 12:			
a Excess of revenue over expenses and disbursements		<2,210,140.>	
b Net investment income (If negative, enter -0-)			3,999,980.
c Adjusted net income (If negative, enter -0-)			N/A

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing	158,681.	469,268.	469,268.
	2 Savings and temporary cash investments	4,345,727.	3,985,313.	3,985,313.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	54,574.	71,248.	71,248.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other	113,585,960.	111,972,819.	111,972,819.
	14 Land, buildings, and equipment: basis ▶	102,268.		
	Less: accumulated depreciation ▶	76,764.	34,208.	25,504.
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	118,179,150.	116,524,152.	116,524,152.
	17 Accounts payable and accrued expenses	77,111.	98,574.	
	18 Grants payable	280,604.	540,751.	
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 8)	83,298.	100,237.	
	23 Total liabilities (add lines 17 through 22)	441,013.	739,562.	
	Foundations that follow SFAS 117, check here ▶ ☒			
	24 Unrestricted	117,738,137.	115,784,590.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	117,738,137.	115,784,590.	
	31 Total liabilities and net assets/fund balances	118,179,150.	116,524,152.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	117,738,137.
2 Enter amount from Part I, line 27a	2	<2,210,140.>
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAINS ON INVESTMENTS	3	256,593.
4 Add lines 1, 2, and 3	4	115,784,590.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	115,784,590.

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Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 11,008,163.		11,076,999.	<68,836.>
b 36,269.			36,269.
c			2,021,850.
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<68,836.>
b			36,269.
c			2,021,850.
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 2	1,989,283.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	6,169,988.	120,813,645.	.051070
2014	5,536,213.	124,885,135.	.044330
2013	5,139,123.	119,354,753.	.043058
2012	5,699,417.	114,438,157.	.049803
2011	5,222,949.	117,308,693.	.044523

2 Total of line 1, column (d)	2	.232784
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.046557
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	114,916,294.
5 Multiply line 4 by line 3	5	5,350,158.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	40,000.
7 Add lines 5 and 6	7	5,390,158.
8 Enter qualifying distributions from Part XII, line 4	8	5,915,323.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	40,000.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	40,000.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	40,000.
6	Credits/Payments:		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	100,000.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	20,000.
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	120,000.
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	80,000.
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ☒ 80,000. Refunded ☐	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ VA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.WILLIAMSBURGHEALTHFOUNDATION.ORG</u>	X	
14 The books are in care of ► <u>THE ORGANIZATION</u> Telephone no. ► <u>757-345-0912</u> Located at ► <u>4801 COURTHOUSE STREET, NO. 200, WILLIAMSBURG, VA</u> ZIP+4 ► <u>23188</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		N/A
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ► _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☒ Yes ☐ No b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)	3b	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	X

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

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

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

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

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

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

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

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No
Organizations relying on a current notice regarding disaster assistance check here ☐ N/A

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No
If "Yes" to 6b, file Form 8870

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		167,488.	17,330.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
KAYREN SEGALL - 4801 COURTHOUSE STREET, SUITE 200, WILLIAMSBURG, VA	DIR., INVESTMENTS, FIN. & ADM	40.00 99,478.	23,743.	0.
ALLISON J. BRODY - 4801 COURTHOUSE STREET, SUITE 200, WILLIAMSBURG, VA	DIR. COMM. RES DEV	40.00 91,797.	17,395.	0.
PAULETTE A. PARKER - 4801 COURTHOUSE STREET, SUITE 200, WILLIAMSBURG, VA	GRANTS PROGRAM OFFICER	40.00 80,079.	19,786.	0.
KYRA A COOK - 4801 COURTHOUSE STREET, SUITE 200, WILLIAMSBURG, VA	DIR. STRAT INIT/PROG OFFICER	40.00 73,662.	25,452.	0.
WILLIAM D. PRIBBLE - 4801 COURTHOUSE STREET, SUITE 200, WILLIAMSBURG, VA	GRANTS PROGRAM OFFICER	40.00 61,409.	10,842.	0.

Total number of other employees paid over \$50,000

1

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	107,719,636.
b	Average of monthly cash balances	1b	8,931,670.
c	Fair market value of all other assets	1c	14,982.
d	Total (add lines 1a, b, and c)	1d	116,666,288.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	116,666,288.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,749,994.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	114,916,294.
6	Minimum investment return. Enter 5% of line 5	6	5,745,815.

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

1	Minimum investment return from Part X, line 6	1	5,745,815.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	40,000.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	40,000.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,705,815.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	5,705,815.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,705,815.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	5,910,187.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	5,136.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,915,323.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	40,000.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,875,323.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				5,705,815.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			739,597.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4. ► \$ 5,915,323.				
a Applied to 2015, but not more than line 2a			739,597.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				5,175,726.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				530,089.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY		4,427,043.
Total			3a	4,427,043.
b Approved for future payment				
SEE ATTACHED SCHEDULE	NONE	PUBLIC CHARITY		540,751.
Total			3b	540,751.

Form 990-PF (2016)

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

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

[illegible]

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

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

**Sign
Here**

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


Signature of officer or trustee

11/15/77
Date

PRESIDENT
Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

FRANK H. SMITH

Preparer's signature

Frank H. Smith

Date _____

11/06/17

Check ☐
self-employed

TPTIN

P00639053

Firm's name ► **RAFFA, PC**

Firm's EIN ▶ 52-1511275

Firm's address ► 1899 L ST. NW #900
WASHINGTON, DC 20036

Phone no. **202-822-5000**

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENTS LIMITED	2,191,150.	0.	2,191,150.	2,191,150.	
PARTNERSHIPS UBI FROM	883,181.	0.	883,181.	883,181.	
PARTNERSHIPS	4,399.	0.	4,399.	0.	
TO PART I, LINE 4	3,078,730.	0.	3,078,730.	3,074,331.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
EARNINGS IN EQUITY INVESTMENTS	<696,342.>	<696,342.>	
UBI - PARTNERSHIPS	<221,227.>	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<917,569.>	<696,342.>	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	46,321.	4,632.		41,689.
TO FORM 990-PF, PG 1, LN 16B	46,321.	4,632.		41,689.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING FEES	15,986.	0.		7,961.
INVESTMENT FEES	203,551.	203,551.		0.
TO FORM 990-PF, PG 1, LN 16C	219,537.	203,551.		7,961.

FORM 990-PF	TAXES			STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MUNICIPAL PROPERTY TAXES	971.	0.		971.
FEDERAL EXCISE TAX	5,892.	0.		0.
STATE TAXES	0.	0.		0.
TO FORM 990-PF, PG 1, LN 18	6,863.	0.		971.

FORM 990-PF	OTHER EXPENSES			STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL FEES	1,645.	0.		1,645.
ANNUAL AWARDS	19,141.	0.		19,143.
OFFICE SUPPLIES	10,619.	0.		10,617.
MARKETING	19,441.	0.		19,441.
TELEPHONE/INTERNET	13,294.	0.		13,294.
POSTAGE	2,683.	0.		2,683.
UTILITIES	810.	0.		810.
EDUCATION AND TRAINING	28,267.	0.		28,267.
MAINTAINENCE AGREEMENTS	32,235.	0.		32,235.
INSURANCE	6,520.	0.		6,520.
DUES	19,279.	0.		19,279.
DCA- CHRONIC CARE	47,050.	0.		47,050.
DCA-OTHER	243,030.	0.		233,430.
TO FORM 990-PF, PG 1, LN 23	444,014.	0.		434,414.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MIT PRIVATE EQUITY FUND	FMV	380,302.	380,302.
TIFF ABSOLUTE RETURN POOL	FMV	13,455,737.	13,455,737.
PRIVATE ADVISORS DISTRESSED OPS FD	FMV	0.	0.
TIFF PARTNERS V - US	FMV	242,463.	242,463.
TIFF PARTNERS V - INTERNATIONAL	FMV	100,726.	100,726.
TIFF SECONDARY PARTNERS I	FMV	367,397.	367,397.
TIFF REAL ESTATE PARTNERS II	FMV	548,071.	548,071.
GMO FORESTRY FUND 7	FMV	1,343,601.	1,343,601.
TIFF PEP 2007	FMV	1,387,980.	1,387,980.
MA INVESTORS FUND 1, LLC	FMV	1,722,348.	1,722,348.
PRIVATE ADVISORS SMALL CO BUYOUT FD	FMV	743,631.	743,631.
TIFF PEP 2008	FMV	1,050,614.	1,050,614.
TIFF SHORT TERM FUND	FMV	4,854,295.	4,854,295.
MREP 2008-DCIF	FMV	409,370.	409,370.
TIFF SECONDARY PARTNERS II	FMV	798,471.	798,471.
TIFF MULTI-ASSET FUND	FMV	37,575,964.	37,575,964.
TIFF KEYSTONE FUND	FMV	39,706,458.	39,706,458.
TIFF PEP 2012	FMV	1,145,639.	1,145,639.
TIFF SOF	FMV	2,556,616.	2,556,616.
TIFF PEP 2013	FMV	2,490,058.	2,490,058.
TIFF PEP 2014	FMV	457,561.	457,561.
TIFF RR IV	FMV	360,988.	360,988.
TIFF PEP 2015	FMV	148,783.	148,783.
TIFF PEP 2016	FMV	125,746.	125,746.
TOTAL TO FORM 990-PF, PART II, LINE 13		111,972,819.	111,972,819.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	8
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED FEDERAL EXCISE TAX LIABILITY	83,298.	100,237.
TOTAL TO FORM 990-PF, PART II, LINE 22	83,298.	100,237.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 9
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JEANNE ZEIDLER 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	PRESIDENT/CEO/SECRETARY 40.00	167,488.	17,330.	0.
JEFFERY O. SMITH 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	BOARD CHAIR 1.00	0.	0.	0.
JAMES R. GOLDEN 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	BOARD VICE CHAIR 1.00	0.	0.	0.
CLARENCE A. WILSON 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
STEPHEN R. ADKINS 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
DAVID C. ANDERSON 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
DAVID E. BUSH 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
PAUL W. GERHARDT 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
F.BRIAN Hiestand 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
JOYCE M. JARRETT 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
LAURA J. LODA 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.

WILLIAMSBURG COMMUNITY HEALTH FOUNDATION

54-1822359

ETHYLYN MCQUEEN-GIBSON 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
RICHARD H. RIZK 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
LOUIS F. ROSSITER 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
ROBERT J. SINGLEY 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
JACKSON C. TUTTLE II 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
MARSHALL N. WARNER 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.
KIMBERLY ZEULI 4801 COURTHOUSE STREET, SUITE 200 WILLIAMSBURG, VA 23188	TRUSTEE 1.00	0.	0.	0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII	167,488.	17,330.	0.
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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	10
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ACTIVITY ONE

CHRONIC CARE INITIATIVE- A COLLABORATIVE WITH HEALTHCARE ORGANIZATIONS THAT PROVIDE DIRECT SERVICES TO UNINSURED AND UNDER-INSURED, CHRONICALLY ILL INDIVIDUALS IN THE GREATER WILLIAMSBURG AREA. THE GOAL IS TO IMPROVE THE HEALTH OF THE UNDERSERVED COMMUNITY BY IMPROVING THE ORGANIZATIONS' INDIVIDUAL AND COLLECTIVE CAPACITY TO SERVE THIS POPULATION.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

42,825.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 11
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ACTIVITY TWO

WHRO-A CONTRACT WITH A MULTI-MEDIA COMPANY TO DEVELOP A LIVE ACTION, INTERACTIVE VIDEO SIMULATION IN WHICH MIDDLE SCHOOL STUDENTS ARE ASKED TO MAKE DECISIONS REGARDING ALCOHOL AND DRUG ABUSE, WITH A FOCUS ON THE CONSEQUENCES OF THEIR DECISIONS. SEVERAL STORYLINES AND OUTCOMES WILL BE POSSIBLE BASED ON THE DECISIONS THE STUDENTS MAKE DURING THE SIMULATION.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

50,000.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 12
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ACTIVITY THREE

CHILD HEALTH INITIATIVE- A COLLABORATIVE OF HUMAN SERVICE AND HEALTHCARE PROVIDERS DESIGNED TO IMPROVE LONG-TERM HEALTH OUTCOMES FOR CHILDREN LIVING IN POVERTY IN THE COMMUNITY. THE COLLABORATIVE EMPLOYS A MULTI-DISCIPLINARY, HOME-BASED SERVICE DELIVERY APPROACH TO WORK IN PARTNERSHIP WITH FAMILIES.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 3

30,750.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 13
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ACTIVITY FOUR

SCHOOL HEALTH INITIATIVE PROJECT-A CONTRACT WITH THE SCHROEDER CENTER FOR HEALTH POLICY AT THE COLLEGE OF WILLIAM AND MARY TO PROVIDE SUPPORT TO THE SCHOOL HEALTH INITIATIVE PROGRAM (SHIP). THE SCHROEDER CENTER WORKS WITH SHIP TO ADMINISTER SURVEYS THAT EXAMINE CHANGES IN KNOWLEDGE, ATTITUDE AND BEHAVIORS IN THE AREAS OF PHYSICAL ACTIVITY AND WELLNESS. DATA IS COLLECTED AND ANALYZED BY THE SCHROEDER CENTER AND RESULTS ARE USED TO EVALUATE PROGRAM IMPACT.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 4

50,121.

Williamsburg Community Health Foundations
Form 990-PF, Part XV-Contributions Paid during the year
Year Ended December 31, 2016

54-1822359

Name and Address	If Individual, List Relationship to Foundation Manager or	Foundation Status of Recipient	Purpose of Grant or Contribution		Amount
Angels of Mercy Medical Mission 7151 Richmond Road, Suite 401 Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Chronic Care Collaborative</i>	\$	113,000
Avalon A Center for Women and Children P O Box 6805 Williamsburg VA 23188	N/A	Public Charity	Program Support <i>Hospital Accompaniment</i>	\$	13,500
Avalon A Center for Women and Children P O Box 6805 Williamsburg VA 23188	N/A	Public Charity	Program Support <i>Walking Works</i>	\$	500
ARC P O Box 6805 Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Fitness Program</i>	\$	25,000
Bacon Street 247 McLaws Circle, Suite 100 Post Office Drawer 279 Williamsburg VA 23187-0279	N/A	Public Charity	Program Support <i>Healing Project Partnership</i>	\$	32,000
Bacon Street 247 McLaws Circle, Suite 100 Post Office Drawer 279 Williamsburg VA 23187-0279	N/A	Public Charity	Program Support <i>Youth Substance Abuse Intervention and Treatment</i>	\$	12,500
Center for Child and Family Services, Inc P O Box 7315 2021 Cunningham Drive Suite	N/A	Public Charity	Program Support <i>Neurofeedback Counseling Program</i>	\$	12,500
Center for Child and Family Services, Inc P O Box 7315 2021 Cunningham Drive Suite	N/A	Public Charity	Program Support <i>Violence Prevention and Intervention Program</i>	\$	30,000
Center for Child and Family Services, Inc P O Box 7315 2021 Cunningham Drive Suite	N/A	Public Charity	Program Support <i>Multicultural Counseling Outreach Program</i>	\$	40,000
Child Development Resources PO Box 280 Norge, VA 23127	N/A	Public Charity	Program Support <i>Breastfeeding Building Confidence and Competence</i>	\$	12,000
Child Development Resources PO Box 280 Norge, VA 23127	N/A	Public Charity	Program Support <i>Walking Works</i>	\$	500
City of Williamsburg 401 Lafayette Street Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Children's Health Initiative</i>	\$	260,000
City of Williamsburg 401 Lafayette Street Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Eat Well to Compete Well</i>	\$	5,000
City of Williamsburg 401 Lafayette Street Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Walking Works</i>	\$	500
City of Williamsburg 401 Lafayette Street Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>2016 Annual Awards Honoree</i>	\$	10,000
Colonial Behavioral Health 1657 Merrimac Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Greater Williamsburg Network of Care (NOC)</i>	\$	34,000
Colonial Behavioral Health 1657 Merrimac Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Website Chronic Care Collaborative</i>	\$	183,000
Colonial Behavioral Health 1657 Merrimac Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Greater Williamsburg Child Assessment Center (GWCAC)</i>	\$	271,000

Colonial Behavioral Health 1657 Merrimac Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Intensive Outpatient Program</i>	\$	67,500
Colonial Community Corrections 4093 Ironbound Road, Suite B Williamsburg, VA 23188	N/A	Public Charity	Program Support- <i>Better Ways Program</i>	\$	25,000
Community Housing Partners 448 Depot Street Christiansburg, VA 24073	N/A	Public Charity	Program Support <i>Mobile Food Pantry</i>	\$	5,927
The Doorways 612 E Marshall Street Richmond, VA 23219	N/A	Public Charity	Program Support <i>Patient and Family Access</i>	\$	15,000
FREE Foundation for Rehabilitation Equipment and Endowment P O Box 8873 FISH, Inc	N/A	Public Charity	Program Support <i>Geographic Expansion to Serve WHF Service Area</i>	\$	31,500
312 Waller Mill Road, Suite 800 Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Health Prontes in Action</i>	\$	6,300
Gloucester-Mathews Free Clinic 2276 George Washington Memorial Highway Haves VA 23072	N/A	Public Charity	Program Support <i>Chronic Care Collaborative</i>	\$	270,000
Grove Christian Outreach Center 8910 Pocahontas Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Children's Summer Lunch Program</i>	\$	4,400
Grove Christian Outreach Center 8910 Pocahontas Trail Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Food Access Outreach Program</i>	\$	4,000
Housing Partnerships 115 Palace Lane Williamsburg, VA 23185	N/A	Public Charity	Program Support <i>Rapid Response Ramp Loan Program</i>	\$	13,878
Institute for Public Health Innovation 1301 Connecticut Ave, NW Suite 200	N/A	Public Charity	Program Support	\$	20,000
KaBOOM! Inc 4301 Connecticut Avenue NW Washington D C 20008-2304	N/A	Public Charity	Program Support <i>Community Playground Build</i>	\$	100,000
Literacy for Life at the Rita Welsh Adult Learning Center P O Box 8795 Williamsburg VA 23187-8795	N/A	Public Charity	Program Support <i>HEAL Program</i>	\$	60,000
New Horizons Family Counseling Center	N/A	Public Charity	Program Support <i>Youth and Family Counseling</i>	\$	171,500
The School of Education College of William & Mary P O Olde Towne Medical Center 5249 Olde Towne Road Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Basic Operating Support</i>	\$	225,000
Olde Towne Medical Center 5249 Olde Towne Road Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Chronic Care Collaborative</i>	\$	250,000
Olde Towne Medical Center 5249 Olde Towne Road Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Transition from Hospital to Home Partnership</i>	\$	58,000
Olivet Medical Ministry, Inc 1620 Old Williamsburg Road Yorktown, VA 23690	N/A	Public Charity	Program Support <i>Chronic Care Collaborative</i>	\$	420,000
Olivet Medical Ministry, Inc 1620 Old Williamsburg Road Yorktown, VA 23690	N/A	Public Charity	Program Support <i>Mobile Food Pantry</i>		
Olivet Medical Ministry, Inc 1620 Old Williamsburg Road Yorktown, VA 23690	N/A	Public Charity	Program Support <i>Volunteer Recruitment Program</i>	\$	13,000

Peninsula Agency on Aging 739 Thimble Shoals Boulevard, Suite 1006	N/A	Public Charity	Program Support Senior Health Assistance Resource Project (S H A R P)	\$	64,000
Newport News VA 23606-3585 Peninsula Agency on Aging 739 Thimble Shoals Boulevard, Suite 1006	N/A	Public Charity	Program Support Care Transitions Intervention Pilot Program	\$	37,500
Newport News VA 23606-3585 Peninsula Agency on Aging 739 Thimble Shoals Boulevard, Suite 1006	N/A	Public Charity	Program Support RIDES Program	\$	117,846
Newport News VA 23606-3585 PeninsulaMetropolitan YMCA 41 Old Oyster Point Road, Suite C	N/A	Public Charity	Program Support YMCA's Diabetes Prevention Program	\$	22,753
Newport News VA 23602 Postpartum Support Virginia P O Box 7521 Arlington, VA 22207	N/A	Public Charity	Program Support Healthy Mother, Healthy Family	\$	4,000
Rx Partnership 2924 Emerywood Parkway, Suite 300	N/A	Public Charity	Program Support Chronic Care Collaborative	\$	35,000
Richmond VA 23294 United Way of Greater Williamsburg 5400 Discovery Park Blvd , Suite 104	N/A	Public Charity	Program Support Home for Good	\$	130,000
United Way of Greater Williamsburg 5400 Discovery Park Blvd , Suite 104	N/A	Public Charity	Program Support Professional Consulting Services	\$	6,500
Virginia Health Care Foundation 707 E Main Street, Suite 1350 Richmond, VA 23219	N/A	Public Charity	Program Support Greater Williamsburg Medication Assistance Program (GWMAP)	\$	400,000
Virginia Legacy Soccer Club 1117 Old Colony Lane Williamsburg, VA 23185	N/A	Public Charity	Program Support Virginia Legacy Soccer Club Community Partnership	\$	16,000
Virginia Oral Health Coalition 4200 Innslake Drive, Suite 103 Glen Allen, VA 23060	N/A	Public Charity	Program Support Oral Health Integration for Greater Williamsburg	\$	4,000
Virginia Regional Ballet 1228 Richmond Road Williamsburg, VA 23185	N/A	Public Charity	Program Support Virginia Regional Ballet Fitness Camp	\$	4,700
Virginia Peninsula Foodbank 2401 Aluminum Avenue Hampton, VA 23661	N/A	Public Charity	Program Support Mobile Pantry Fresh Produce	\$	20,000
Williamsburg Area Faith in Action 354 McLaws Circle, Suite 2 Williamsburg, VA 23185	N/A	Public Charity	Program Support Medical Transportation	\$	24,000
Williamsburg Area Faith in Action 354 McLaws Circle, Suite 2 Williamsburg, VA 23185	N/A	Public Charity	Program Support Resource Visitors Program	\$	14,500
Williamsburg Area Faith in Action 354 McLaws Circle, Suite 2 Williamsburg, VA 23185	N/A	Public Charity	Program Support Walking Works	\$	500
Williamsburg Area Meals-On- Wheels, Inc P O Box 709	N/A	Public Charity	Program Support Annual Award	\$	4,257
Williamsburg VA 23187-0709 Williamsburg Area Meals-On- Wheels, Inc P O Box 709	N/A	Public Charity	Program Support Nutritious Noontime Meals	\$	25,000
Williamsburg VA 23187-0709 Williamsburg House of Mercy, Inc 10 Hamson Avenue	N/A	Public Charity	Program Support Upper James City County Mobile Food Pantry	\$	6,500
Williamsburg VA 23185 Williamsburg-James City County Public Schools 101-D Mounts Bay Road, P O Box 8783	N/A	Public Charity	Program Support Eat Well to Compete Well Jamestown High School	\$	4,482

Williamsburg-James City County Public Schools 101-D Mounts Bay Road, P O Box 8783	N/A	Public Chanty	Program Support School Health Initiative Program (SHIP)	\$	640,000
Williamsburg-James City County Public Schools 101-D Mounts Bay Road, P O Box 8783	N/A	Public Chanty	Program Support Walking Works	\$	1,500
York County Division of Juvenile Services 224 Ballard Street, P O Box 532 Yorktown VA 23690	N/A	Public Chanty	Program Support Psychological and Substance Abuse Services	\$	28,000
TOTAL CONTRIBUTIONS PAID DURING THE YEAR				\$	4,427,043

Williamsburg Community Health Foundation
Form 990-PF, Part XV-Approved for Future Payment
Year Ended December 31, 2016

54-1822359

Name and Address	If Individual, List Relationship to Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Grants Payable Balance
Center for Child and Family Services, Inc P O Box 7315 2021 Cunningham Drive, Suite 400 Hampton, VA 23666-3371	N/A	Public Charity	Program Support <i>Multicultural Counseling and Outreach Program for the Greater Williamsburg Area</i>	\$ 12,500
Child Development Resources (CDR) PO Box 280 Norge, VA 23127	N/A	Public Charity	Program Support <i>Breastfeeding Building Confidence and Competence</i>	\$ 12,000
Community Health Solutions (CHS) 9603 Gayton Road Suite 201 Richmond, VA 23228	N/A	N/A	Program Support <i>Childrens Behavioral Health Initiative</i>	\$ 2,750
Community Health Solutions (CHS) 9603 Gayton Road Suite 201 Richmond, VA 23228	N/A	N/A	Program Support <i>Childrens Health Initiative</i>	\$ 15,750
Community Health Solutions (CHS) 9603 Gayton Road Suite 201 Richmond, VA 23228	N/A	N/A	Program Support <i>Chronic Care Collaborative</i>	\$ 20,998
FREE Foundation for Rehabilitation Equipment and Endowment P O Box 8873 Roanoke, VA 24014	N/A	Public Charity	Program Support	\$ 12,500
Housing Virginia 205 N Robinson Street Richmond, VA 23220	N/A	N/A	Program Support <i>Housing and Health Research and Community Engagement</i>	\$ 15,000
Peninsula Agency on Aging 739 Thimble Shoals Boulevard, Suite 1006 Newport News, VA 23606-3585	N/A	Public Charity	Program Support <i>Care Transitions Intervention Pilot Program</i>	\$ 37,500
Peninsula Agency on Aging 739 Thimble Shoals Boulevard, Suite 1006 Newport News, VA 23606-3585	N/A	Public Charity	Program Support <i>Senior Health Assistance Resource Project (S H A R P)</i>	\$ 64,000
Peninsula Metropolitan YMCA 41 Old Oyster Point, Road, Suite C Newport News, VA 23607	N/A	Public Charity	Program Support <i>YMCA's Diabetes Prevention Program (YMCA DPP)</i>	\$ 22,753
Olde Towne Medical Center 5249 Olde Towne Road Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Transition Program</i>	\$ 25,000
Olde Towne Medical Center 5249 Olde Towne Road Williamsburg, VA 23188	N/A	Public Charity	Program Support <i>Basic Operating Support</i>	\$ 225,000
Williamsburg Area Meals on Wheels P O Box 709 Williamsburg, VA 23187	N/A	Public Charity	Program Support <i>Nutritious Noontime Meals</i>	\$ 25,000
WHRO 5200 Hampton Boulevard Norfolk, VA 23508	N/A	Public Charity	Program Support <i>Middle School Learning Content</i>	\$ 50,000

Total Contributions Approved for Future

\$540,751

The following criteria apply to all WCHF grants:

- **Basic eligibility:**
 - Agency type
 - Non-profit 501(c)3 agencies (IRS determination letter required)
 - State, local or other government agencies
 - Fiscal Sponsorships in accordance with WCHF policies are permitted
 - Program/project must serve residents in the WCHF service area (City of Williamsburg, City of Poquoson, James City County, York County)
- **Required documents from applicant agencies** (in addition to WCHF application forms):
 - Board roster
 - Annual report
 - IRS Form 990
 - Annual audit in accordance with WCHF policies
- **Allowable costs:**
 - Program and/or operating costs as outlined in the grant application
 - Indirect costs calculated at up to 15% of salaries and wages (employee benefits not included) included in the project budget
 - Employee benefits in accordance with WCHF policies
- **Excluded costs:**
 - Annual appeals and fundraising
 - Endowments
 - Real estate acquisition
 - Restoration of funds cut by governments or other organizations
 - Lobbying

Williamsburg Community Health Foundation
Revised Grant Making Categories

Grant category	Eligibility (in addition to basic eligibility)	Requirements	Characteristics	Application forms (in addition to required documents)
Foundation-directed	• Invitation only • May evolve from another type of grant category • Or may develop into another type of grant category	• Program aligns significantly with WCHF Strategic Plan • Population served aligns with WCHF Strategic Plan • Need for program is clearly demonstrated • Outcomes are process-driven, data-driven and long-term	• Ongoing grant • Intense, year-round staff involvement • Innovative, thus outcomes may initially involve some uncertainty • Involves collaboration with multiple partners	• Streamlined WCHF application • List of measurable goals, both long-term and for grant cycle • Organization budget • Program budget • Program budget narrative • Job description(s), if applicable • Contract includes measurable goals with six-month and final reporting requirements

Williamsburg Community Health Foundation
Revised Grant Making Categories

Grant category	Eligibility (in addition to basic eligibility)	Requirements	Characteristics	Application forms (in addition to required documents)
Basic Operating Support	• Invitation only • May evolve from another type of grant category • Or may develop into another type of grant category • Government agencies, colleges and universities, and hospitals are not eligible • No agency may receive more than one WCHF “basic operating support” grant at any given time	• Organization mission aligns with WCHF Strategic Plan • Population served aligns with WCHF Strategic Plan • Need for the organization mission is clearly demonstrated • Outcomes are data-driven and clear • Organization has significant track record and must have received WCHF funding within the last three years • WCHF support may not exceed 30% of organization budget • Organization has demonstrated at least three years of stable executive leadership • Must successfully seek funding from additional sources	• Ongoing grant • Intense staff involvement at the invitation stage of grant making process • Grant made on an annual basis • Grant funds are unrestricted, keeping in mind excluded costs • Outputs and outcomes are predictable • Initial “basic operating support” funding recommendations are based on existing WCHF funding amounts and supported by best-practices research	• Streamlined WCHF application • List of measurable goals for grant cycle • Organization budget • Contract includes measurable goals with six-month and final reporting requirements

Williamsburg Community Health Foundation
Revised Grant Making Categories

Grant category	Eligibility (in addition to basic eligibility)	Requirements	Characteristics	Application forms (in addition to required documents)
Basic Program Support	• Invitation only • May evolve from another type of grant category • Or may develop into another type of grant category • No agency may receive more than two WCHF "basic program support" grants in any calendar year	• Program goals aligns with WCHF Strategic Plan • Population served aligns with WCHF Strategic Plan • Need for the program is clearly demonstrated • Outcomes are data-driven and clear • Organization operating the program has significant track record • Must successfully seek funding from additional sources	• Ongoing grant • Intense staff involvement at the invitation stage of grant making process • Grant made on an annual basis • Offers an opportunity for service delivery of interest to WCHF • Grant funds are restricted to specific program • Outputs and outcomes are predictable • Initial "basic program support" funding recommendations are based on existing WCHF funding amounts and supported by best-practices research	• Streamlined WCHF application • List of measurable goals for grant cycle • Program budget • Program budget narrative • Program income form • Job description(s), if applicable • Contract includes measurable goals with six-month and final reporting requirements

Williamsburg Community Health Foundation
Revised Grant Making Categories

Grant category	Eligibility (in addition to basic eligibility)	Requirements	Characteristics	Application forms (in addition to required documents)
Responsive	• Initiated by LOI • Open to any qualified applicant • Or may develop from a "basic operating support" or "basic program support" grant should WCHF choose to decrease funding • No agency may receive more than two WCHF "responsive" grants in any calendar year	• Population served aligns with WCHF Strategic Plan • Program/project aligns with WCHF Strategic Plan • Need for program is demonstrated • Outcomes are data-driven and near-term • If applicable, realistic sustainability plan in place to accommodate decreased funding	• Provides opportunity to fund new initiatives • May include WCHF requests to address a specific need • May be one-time grant • Or funding declines over 3 to 4 years or less: ○ Year 1 was a new grant or from a different category ○ Year 2 at 75% ○ Year 3 at 50% ○ Year 4 at 25% ○ Year 5 at zero • Not obligated to fund for four years if outcomes are not met • Or, if successful, program "graduates" to another level	• Post-LOI, invitation to apply: ○ Current WCHF application ○ Program budget ○ Program budget narrative ○ Program income form ○ Job description(s), if applicable • Contract includes indicators of success with six-month and final reporting requirements