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Extended to January 16, 2018

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

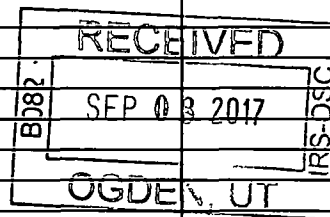
For calendar year 2016 or tax year beginning

MAR 1, 2016

and ending

FEB 28, 2017

Name of foundation The Norwood Foundation		A Employer identification number 01-0705471	
Number and street (or P.O. box number if mail is not delivered to street address) PO Box 792		Room/suite	B Telephone number 719-593-2600
City or town, state or province, country, and ZIP or foreign postal code Manitou Springs, CO 80829		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) \$ 2,533. (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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 930,650.			
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			
5a Gross rents			
b Net rental income or (loss)			
6a Net gain or (loss) from sale of assets not on line 10			
b Gross sales price for all assets on line 6a			
7 Capital gain net income (from Part IV, line 2)		0.	
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			
12 Total. Add lines 1 through 11 930,650.		0.	0.
13 Compensation of officers, directors, trustees, etc		0.	0.
14 Other employee salaries and wages			
15 Pension plans, employee benefits			
16a Legal fees			
b Accounting fees			
c Other professional fees			
17 Interest			
18 Taxes			
19 Depreciation and depletion			
20 Occupancy			
21 Travel, conferences, and meetings			
22 Printing and publications			
23 Other expenses			
24 Total operating and administrative expenses. Add lines 13 through 23 0.		0.	0.
25 Contributions, gifts, grants paid 929,770.			929,770.
26 Total expenses and disbursements. Add lines 24 and 25 929,770.		0.	929,770.
27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements 880. b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)		0.	0.



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Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	1,653.	2,533.		
	2 Savings and temporary cash investments				
	3 Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less: allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock				
	c Investments - corporate bonds				
	Liabilities	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶					
12 Investments - mortgage loans					
13 Investments - other					
14 Land, buildings, and equipment basis ▶					
Less: accumulated depreciation ▶					
15 Other assets (describe ▶)					
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		1,653.	2,533.	2,533.	
17 Accounts payable and accrued expenses					
18 Grants payable					
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☒				
	24 Unrestricted	1,653.	2,533.		
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☐				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg., and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances	1,653.	2,533.			
31 Total liabilities and net assets/fund balances	1,653.	2,533.			

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	1,653.
2 Enter amount from Part I, line 27a	2	880.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,533.
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	2,533.

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				
b NONE				
c				
d				
e				

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			

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

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	1,201,321.	4,497.	267.138314
2014	676,700.	3,341.	202.544148
2013	1,192,174.	3,465.	344.061760
2012	1,412,221.	17,876.	79.000951
2011	971,080.	4,831.	201.010143

2 Total of line 1, column (d)	2	1,093.755316
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	218.751063
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	22,700.
5 Multiply line 4 by line 3	5	4,965,649.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	4,965,649.
8 Enter qualifying distributions from Part XII, line 4 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.	8	929,770.

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

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?		
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) <u>CO</u>		
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		
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

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?		X
Website address N/A		
14 The books are in care of Christopher S. Jenkins Telephone no. 719-593-2600		
Located at 111 S. Tejon Street, Suite 222, Colorado Springs, ZIP+4 80903		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐		
and enter the amount of tax-exempt interest received or accrued during the year 15 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?	Yes	No
	16	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country N/A		

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	N/A	
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?		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 N/A		
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.		
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)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

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

6b

X

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?

N/A

7b

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

(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
David D. Jenkins	President			
PO Box 792				
Manitou Springs, CO 80829	1.00	0.	0.	0.
Carolyn S. Jenkins	Vice President			
PO Box 792				
Manitou Springs, CO 80829	1.00	0.	0.	0.
Christopher S. Jenkins	Sec/Treas			
PO Box 792				
Manitou Springs, CO 80829	1.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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	0.
b	Average of monthly cash balances	1b	23,046.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	23,046.
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	23,046.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	346.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,700.
6	Minimum investment return. Enter 5% of line 5	6	1,135.

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	1,135.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,135.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,135.
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	1,135.

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	929,770.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	929,770.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	929,770.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				1,135.
2 Undistributed income, if any, as of the end of 2016			0.	
a Enter amount for 2015 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	970,838.			
b From 2012	1,411,327.			
c From 2013	1,192,001.			
d From 2014	676,700.			
e From 2015	1,201,096.			
f Total of lines 3a through e	5,451,962.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$	929,770.			
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				1,135.
e Remaining amount distributed out of corpus	928,635.			
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:	6,380,597.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	970,838.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	5,409,759.			
10 Analysis of line 9:				
a Excess from 2012	1,411,327.			
b Excess from 2013	1,192,001.			
c Excess from 2014	676,700.			
d Excess from 2015	1,201,096.			
e Excess from 2016	928,635.			

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				
American Red Cross 431 18th Street NW Washington, DC 20006		PC	General Purpose	25,500.
Bethesda Ministries - One Child Matters P.O. Box 62600 Colorado Springs, CO 80962		PC	General Purpose	2,500.
Boys & Girls Club 102 E. Pikes Ave, Suite 500 Colorado Springs, CO 80903		PC	General Purpose	5,000.
CanCare 9575 Katy Freeway, Suite 428 Houston, TX 77024		PC	General Purpose	1,000.
Cheyenne Mountain Zoological Society 4250 Cheyenne Mountain Zoo Road Colorado Springs, CO 80906		PC	General Purpose	1,000.
Total	See continuation sheet(s)			929,770.
b Approved for future payment				
None				
Total				0.

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

- | | |
|--|---|
| <p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p> | <p>Yes</p> |
| | <p>1a(1)</p> <p>1a(2)</p> |
| | <p>1b(1)</p> <p>1b(2)</p> |
| | <p>1b(3)</p> <p>1b(4)</p> |
| | <p>1b(5)</p> <p>1b(6)</p> |
| | <p>1c</p> |

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

[illegible]

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

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

**Sign
Here**

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

~~Signature of officer or trustee~~

Date _____

President

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

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Gregory L. Gandy,
CPA

Preparer's signature

Date _____

08/14/7

Check ☐
self-employed

PTIN

P00294661

Firm's name ► BiggsKofford, ~~p.c.~~

Firm's EIN ► 84-0884124

Firm's address ► 630 Southpointe Court, Suite 200
Colorado Springs, CO 80906

Phone no. **719.579.9090**

The Norwood Foundation

01-0705471

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
Cheyenne Village, Inc. 6275 Lehman Drive Colorado Springs, CO 80918		PC	General Purpose	20,000.
Children's Literacy Center 2928 Straus Lane Colorado Springs, CO 80907		PC	General Purpose	3,000.
Colorado All Services Academy Ball 2737 Bruan Court Lakewood, CO 80228		PC	General Purpose	1,000.
Colorado Council for Economic Education 3443 South Galena Street, Suite 190 Denver, CO 80231		PC	General Purpose	5,000.
Colorado Springs Children's Chorale P.O. Box 7841 Colorado Springs, CO 80933		PC	General Purpose	1,000.
Colorado Springs Youth Symphony P.O. Box 7846 Colorado Springs, CO 80933		PC	General Purpose	1,000.
Compassion International 12290 Voyager Way Colorado Springs, CO 80907		PC	General Purpose	201,620.
Concrete Couch 214 E. Vermijo Avenue Colorado Springs, CO 80903		PC	General Purpose	1,000.
Council of Neighborhood Organizations 309 South Cascade Avenue Colorado Springs, CO 80903		PC	General Purpose	5,000.
Cystic Fibrosis 400 S. Colorado Boulevard, Suite 840 Dever, CO 80246		PC	General Purpose	10,000.
Total from continuation sheets				894,770.

The Norwood Foundation

01-0705471

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
Driving Skills Institute 3280 E Woodmen Rd # 100 Colorado Springs, CO 80920		PC	General Purpose	1,000.
Fostering Hope 1111 S. Tejon St, Suite 112 Colorado Springs, CO 80903		PC	General Purpose	10,000.
Gazette-El Pomar Empty Stocking Fund 30 East Pikes Peak Avenue Colorado Springs, CO 80903		PC	General Purpose	10,000.
Girl Scouts of Colorado 3801 E. Florida Ave, Suite 720 Denver, CO 80210		PC	General Purpose	1,500.
International Justice Mission P.O. Box 58147 Washington, DC 20037		PC	General Purpose	200,000.
KTLF -Education Communications of Colorado Springs 1665 Briargate Boulevard Colorado Springs, CO 80920		PC	General Purpose	1,000.
Landmark Community School 332 E Willamette Ave Colorado Springs, CO 80903		PC	General Purpose	5,000.
Latigo 13710 Halleluia Trail Elbert, CO 80106		PC	General Purpose	8,150.
Leadership Program of the Rockies 1777 S. Harrison Street, Suite 807 Denver, CO 80210		PC	General Purpose	10,000.
Limon School District RE-4J 912 Badger Way Limon, CO 80828		PC	General Purpose	2,500.
Total from continuation sheets				

The Norwood Foundation

01-0705471

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
Manitou Springs Historical Society 9 Capital Hill Avenue Manitou Springs, CO 80829		PC	General Purpose	2,500.
Mayo Clinic 200 First Street Rochester, MN 55905		PC	General Purpose	3,000.
MDA 222 S. Riverside Plaza, Suite 1500 Chicago, IL 60606		PC	General Purpose	1,000.
Newborn Hope P.O. Box 2515 Colorado Springs, CO 80901		PC	General Purpose	1,500.
One Simple Voice 228 N. Cascade Ave Colorado Springs, CO 80903		PC	General Purpose	1,000.
Penrose St. Francis Health Foundation 2222 N. Nevada Avenue Colorado Springs, CO 80907		PC	General Purpose	10,000.
Pikes Peak Hospice Foundation 2550 Tenderfoot Hill Street Colorado Springs, CO 80906		PC	General Purpose	5,000.
Pikes Peak or Bust Rodeo Foundation 1045 Lower Gold Camp Road Colorado Springs, CO 80905		PC	General Purpose	7,500.
Pikes Peak Therapeutic Riding Center 13620 Halleluiah Trail Colorado Springs, CO 80106		PC	General Purpose	1,000.
Pine Creek High School P.O. Box 876 Colorado Springs, CO 80901		PC	General Purpose	1,000.
Total from continuation sheets				

The Norwood Foundation

01-0705471

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
Rotary Foundation 1560 Sherman Avenue Evanston, IL 60201		PC	General Purpose	100,000.
Shield 616 - Colorado Springs Police 5575 Molly Court Colorado Springs, CO 80908		PC	General Purpose	1,000.
Sigma Phi Epsilon Educational Foundation 310 South Boulevard Richmond, VA 23220		PC	General Purpose	25,000.
St. Mary's High School 2501 E Yampa St Colorado Springs, CO 80909		PC	General Purpose	1,000.
Tessa 435 Gold Pass Heights Colorado Springs, CO 80906		PC	General Purpose	2,500.
The Give! Campaign 235 S. Nevada Ave Colorado Springs, CO 80903		PC	General Purpose	12,500.
The Home Front Cares P.O. Box 38516 Colorado Springs, CO 80937		PC	General Purpose	5,000.
The Navigators P.O. Box 6000 Colorado Springs, CO 56007		PC	General Purpose	2,500.
The Outreach Foundation 381 Riverside Drive, Suite 110 Franklin, TN 37064		PC	General Purpose	100,000.
ULI Foundation 1025 Thomas Jefferson Street, NW Suite 500W Washington, DC 20007		PC	General Purpose	20,000.
Total from continuation sheets				

The Norwood Foundation

01-0705471

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
University of Colorado Foundation 4740 Walnut Street Boulder, CO 80301		PC	General Purpose	26,000.
USO 1625 Ellis St Fort Carson, CO 80913		PC	General Purpose	10,000.
Various Grants Under \$1,000 Colorado Springs, CO 80903		PC	General Purpose	2,000.
Voice of Truth P.O. Box 15013 Colorado Springs, CO 80935		PC	General Purpose	1,000.
YMCA of the Pikes Peak Region 316 N. Nevada Avenue Colorado Springs, CO 80903		PC	General Purpose	25,000.
Young Life P.O. Box 520 Colorado Springs, CO 80901		PC	General Purpose	25,000.
Young Musicians Foundation of Colorado P.O. Box 78 Littleton, CO 80160		PC	General Purpose	5,000.
Total from continuation sheets				

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2016

Name of the organization

Employer identification number

The Norwood Foundation

01-0705471

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization	Employer identification number
The Norwood Foundation	01-0705471

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Development Management, Inc. P.O. Box 792 Manitou Springs, CO 80829	\$ 930,650.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
The Norwood Foundation	01-0705471

Part II Noncash Property (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization The Norwood Foundation	Employer identification number 01-0705471
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

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

Form 990-PF

Grant Application Submission Information
Part XV, Lines 2a through 2d

Statement 1

Name and Address of Person to Whom Applications Should be Submitted

Christopher S. Jenkins
PO Box 792
Manitou Springs, CO 80829

Telephone Number

719-593-2600

Form and Content of Applications

See attached application form required for scholarships.

Any Submission Deadlines

None

Restrictions and Limitations on Awards

Individuals pursuing a college education must be a high school graduate. Individuals seeking trade or vocational skills need not be a high school graduate, but must comply with the admission requirements of the training institution. In addition the Foundation will support organizations and activities that pursue religious, charitable, scientific, literary or educational purposes and for the prevention of cruelty to children.

EXHIBIT A

THE NORWOOD FOUNDATION

SCHOLARSHIP FUND

The Norwood Foundation Scholarship (200_) will be awarded to a worthy Colorado High School graduate who has been accepted to pursue a course of study or instruction at an accredited college or university granting undergraduate or graduate degrees, or at any institution to improve or enhance a literary, artistic, musical, scientific, teaching (or other similar capacity) skill, or talent of the grantee.

Applications will be reviewed by a committee of three persons: one member from the Foundation's Board and two members selected from the faculties of either the Colorado College, the University of Colorado, Colorado Springs, or School Districts in the Pikes Peak region. This committee will select as the recipient a student who has demonstrated an ability to excel in one or more academic disciplines and who has the potential for substantial additional achievement in the years ahead.

This year, available funds will provide a scholarship of \$_____. The recipient will be eligible to receive a like sum each year (up to a maximum of four years) that he or she remains a student in good standing at a college, university or other institution.

Applications must be received by the Foundation on or before _____ 200_. The application package will consist of the following:

1. Complete transcript of the student's academic record in high school;
2. Two references from high school teachers or counselor, and one reference from high school superintendent or principal; and
3. Application form completed by student.

EXHIBIT B

THE NOR'WOOD FOUNDATION

Scholarship Application Form

NAME OF APPLICANT: _____

HOME ADDRESS, ZIP: _____

PHONE NUMBER: _____

PARENTS' NAMES: _____

HIGH SCHOOL, ADDRESS: _____

CLASS STANDING BY PERCENTILE: _____ HIGH SCHOOL GPA: _____

COMPOSITE
ACT: _____ ACT OR SAT Verbal: _____ ACT OR SAT Non-Verbal: _____

ACADEMIC HONORS RECEIVED: _____

(e.g., National Merit Scholarship Honorable Mention) _____

INTENDED FIELD OF STUDY: _____

APPLICATIONS SUBMITTED TO FOLLOWING SCHOOLS: _____

APPLICANT ACCEPTED AT: _____

BRIEF SUMMARY OF EXTRA-CURRICULAR ACTIVITIES AND INTERESTS:

Please attach to this application a short, handwritten (maximum two pages) description of your projected course of study in college and of your plans following college graduation.

Signed: _____

Date: _____

EXHIBIT C

THE NORWOOD FOUNDATION

CONFIDENTIAL RECOMMENDATION FORM

High School Superintendent or Principal

Return directly to:

The Norwood Foundation
P.O. Box 792
Manitou Springs, CO 80829

APPLICANT: _____

1. Based on your overall knowledge, how do you rate this applicant's potential for noteworthy future achievements in the field or fields in which he/she is most talented and interested?

2. Applicant's financial need is:

_____ Greater than average

_____ Average

_____ Less than average

3. Explain, if necessary:

(School Name - Please Print)

Signed: _____
High School Superintendent
or Principal

Date: _____