

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

2012

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2012 calendar year, or tax year beginning **04/01**, 2012, and ending **03/31**, 20**13**

B Check if applicable:
 Address change
 Name change
 Initial return
 Terminated
 Amended return
 Application pending

C Name of organization **COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS**
 Doing Business As
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite
1500 Main St Suite 2300
 City, town or post office, state, and ZIP code
Springfield, MA 01115

D Employer identification number
22-3089640

E Telephone number
413-732-2858

F Name and address of principal officer: **Donna Roseman David**
1500 Main St, Suite 2300, Springfield, MA 01199

G Gross receipts \$ **10,234,001**

H(a) Is this a group return for affiliates? Yes No
H(b) Are all affiliates included? Yes No
 If "No," attach a list. (see instructions)

I Tax-exempt status: 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527

J Website: ▶ **www.communityfoundation.org**

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: **1991** **M** State of legal domicile: **MA**

H(c) Group exemption number ▶

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: <u>Community Foundation whose mission is to enrich the quality of life in the region (Hampden, Hampshire and Franklin Counties in Massachusetts) by encouraging philanthropy, developing a permanent endowment and promoting efficiency in managing charitable funds.</u>		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	14
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	14
	5	Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	21
	6	Total number of volunteers (estimate if necessary)	6	100
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 8,142,822	Current Year 8,481,579
	9	Program service revenue (Part VIII, line 2g)	276,424	246,061
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	1,907,108	1,585,129
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-121,974	-78,768
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	10,204,380	10,234,001
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	6,911,001	9,474,217
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	949,010	1,185,300
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 430,975		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	676,971	768,811
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	8,536,982	11,428,328	
19	Revenue less expenses. Subtract line 18 from line 12	1,667,398	-1,194,327	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year 98,010,892	End of Year 103,619,620
	21	Total liabilities (Part X, line 26)	8,270,555	9,011,043
	22	Net assets or fund balances. Subtract line 21 from line 20	89,740,337	94,608,577

Part II Signature Block

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

Sign Here

Signature of officer: Donna Roseman David, CFO/CAO Date: _____
 Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name: _____ Preparer's signature: _____ Date: _____ Check if self-employed PTIN: _____
 Firm's name ▶: _____ Firm's EIN ▶: _____
 Firm's address ▶: _____ Phone no.: _____

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III

1 Briefly describe the organization's mission:

Community Foundation whose mission is to enrich the quality of life in the region of Hampden, Hampshire and Franklin counties in Massachusetts by encouraging philanthropy, developing a permanent endowment and promoting efficiency in managing charitable funds.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

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

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: _____) (Expenses \$ 8,732,357 including grants of \$ 8,052,061) (Revenue \$ 246,061)

Grant Program: Competitive grant program and designated grants administered to benefit residents of the 3 counties served, approx. 400 projects funded through this process. Donor advised grants to public charities, approx 1100 grants made.

4b (Code: _____) (Expenses \$ 1,840,638 including grants of \$ 1,422,156) (Revenue \$ 0)

Community Scholarship Program. Provides a centralized application process for scholarships and loans to benefit residents of Western Massachusetts. Awards made based on applicants financial need, academic merit, response to questions and extra curricular activities in accordance with individual fund terms.

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

4d Other program services (Describe in Schedule O.)
(Expenses \$ 0 including grants of \$ 0) (Revenue \$ 0)

4e Total program service expenses **▶** 10,572,995

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12a Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
14a Did the organization maintain an office, employees, or agents outside of the United States?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV.</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Parts II and IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Parts III and IV</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions)</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Part IV Checklist of Required Schedules *(continued)*

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

Part V **Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response to any question in this Part V

		Yes	No		
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	12		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	<input checked="" type="checkbox"/>		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	21		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	2b	<input checked="" type="checkbox"/>		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	<input checked="" type="checkbox"/>		
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b	<input checked="" type="checkbox"/>		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		<input checked="" type="checkbox"/>	
b	If "Yes," enter the name of the foreign country: ▶ _____ See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		<input checked="" type="checkbox"/>	
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		<input checked="" type="checkbox"/>	
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c			
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a		<input checked="" type="checkbox"/>	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b			
7	Organizations that may receive deductible contributions under section 170(c).				
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a		<input checked="" type="checkbox"/>	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b			
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		<input checked="" type="checkbox"/>	
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		<input checked="" type="checkbox"/>	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		<input checked="" type="checkbox"/>	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	<input checked="" type="checkbox"/>		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	<input checked="" type="checkbox"/>		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8		<input checked="" type="checkbox"/>	
9	Sponsoring organizations maintaining donor advised funds.				
a	Did the organization make any taxable distributions under section 4966?	9a		<input checked="" type="checkbox"/>	
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		<input checked="" type="checkbox"/>	
10	Section 501(c)(7) organizations. Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b			
11	Section 501(c)(12) organizations. Enter:				
a	Gross income from members or shareholders	11a			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b			
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a			
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.				
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.	13a			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b			
c	Enter the amount of reserves on hand	13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a		<input checked="" type="checkbox"/>	
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O	14b			

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

Section A. Governing Body and Management

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

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

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

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed ► MA
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
 Own website Another's website Upon request Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► Donna Roseman David, (413)732-2858

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response to any question in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Irene Rodriguez Martin Foundation Trustee	1 0	✓						0	0	0
Peter Daboul Foundation Trustee	1 0	✓						0	0	0
Michael Fritz Foundation Trustee	1 0	✓						0	0	0
George Keady III Foundation Trustee	1 0	✓						0	0	0
Richard B Steele Jr Foundation Trustee	1 0	✓						0	0	0
Willie Hill Foundation Trustee	1 0	✓						0	0	0
Robert Pura Foundation Trustee	1 0	✓						0	0	0
Amy Jamrog Foundation Trustee	1 0	✓						0	0	0
Dana R Barrows Foundation Trustee	1 0	✓						0	0	0
Ralph Tate Foundation Trustee	1 0	✓						0	0	0
Sanford Belden Foundation Trustee	3 0	✓						0	0	0
Dianne Fuller Doherty Foundation Trustee	1 0	✓						0	0	0
Steven Mitus Foundation Trustee	1 0	✓						0	0	0
Ron Ancrum President	40 0			✓			✓	105,923	0	0

Part VIII Statement of Revenue

Check if Schedule O contains a response to any question in this Part VIII.

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a 0					
	b Membership dues	1b 0					
	c Fundraising events	1c 0					
	d Related organizations	1d 0					
	e Government grants (contributions)	1e 0					
	f All other contributions, gifts, grants, and similar amounts not included above	1f 8,481,579					
	g Noncash contributions included in lines 1a-1f: \$	0					
	h Total. Add lines 1a-1f	▶	8,481,579				
Program Service Revenue	Business Code						
	2a Administration Revenue	561000	246,061	246,061	0	0	
	b _____						
	c _____						
	d _____						
	e _____						
	f All other program service revenue .		0	0	0	0	
g Total. Add lines 2a-2f	▶	246,061					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)	▶	1,585,129	1,585,129	0	0	
	4 Income from investment of tax-exempt bond proceeds ▶		0	0	0	0	
	5 Royalties	▶	0	0	0	0	
	6a Gross rents	(i) Real	(ii) Personal				
		b Less: rental expenses					
		c Rental income or (loss)	0	0			
	d Net rental income or (loss)	▶					
	7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		b Less: cost or other basis and sales expenses					
		c Gain or (loss)	0	0			
		d Net gain or (loss)	▶				
	8a Gross income from fundraising events (not including \$ 0 of contributions reported on line 1c). See Part IV, line 18	a					
		b Less: direct expenses	b				
		c Net income or (loss) from fundraising events . ▶					
	9a Gross income from gaming activities. See Part IV, line 19	a					
		b Less: direct expenses	b				
		c Net income or (loss) from gaming activities . . ▶					
10a Gross sales of inventory, less returns and allowances	a						
	b Less: cost of goods sold	b					
	c Net income or (loss) from sales of inventory . . ▶						
Miscellaneous Revenue		Business Code					
11a Change in split interest agreements	900099	-78,768	-78,768	0	0		
b _____							
c _____							
d All other revenue		0	0	0	0		
e Total. Add lines 11a-11d	▶	-78,768					
12 Total revenue. See instructions.	▶	10,234,001	1,752,422	0	0		

Part IX Statement of Functional Expenses

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

Check if Schedule O contains a response to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	9,474,217	9,474,217		
2 Grants and other assistance to individuals in the United States. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	143,424	88,923	20,079	34,422
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	788,743	489,023	110,423	189,297
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	66,149	41,012	9,261	15,876
9 Other employee benefits	104,684	64,904	14,656	25,124
10 Payroll taxes	82,300	51,026	11,522	19,752
11 Fees for services (non-employees):				
a Management				
b Legal	13,605	8,435	1,905	3,265
c Accounting	143,179	88,771	20,045	34,363
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	168,908	12,400	151,708	4,800
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	45,809	28,402	6,413	10,994
12 Advertising and promotion	30,632	18,992	4,288	7,352
13 Office expenses	104,436	64,751	14,621	25,064
14 Information technology	50,970	31,601	7,136	12,233
15 Royalties				
16 Occupancy	95,212	41,893	32,372	20,947
17 Travel	10,234	6,345	1,433	2,456
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	56,450	34,999	7,903	13,548
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	6,891	3,032	2,343	1,516
23 Insurance	11,509	5,064	3,913	2,532
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a Publications	30,976	19,205	4,337	7,434
b _____				
c _____				
d _____				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	11,428,328	10,572,995	424,358	430,975
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response to any question in this Part X

		(A)		(B)
		Beginning of year		End of year
Assets	1 Cash—non-interest-bearing	0	1	0
	2 Savings and temporary cash investments	3,257,820	2	2,629,489
	3 Pledges and grants receivable, net	144,630	3	37,736
	4 Accounts receivable, net	0	4	0
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L	0	5	0
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L	0	6	0
	7 Notes and loans receivable, net	3,509,022	7	3,546,246
	8 Inventories for sale or use	0	8	0
	9 Prepaid expenses and deferred charges	29,275	9	48,451
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	145,292		
	b Less: accumulated depreciation	140,163		
		11,346	10c	5,129
	11 Investments—publicly traded securities	67,803,881	11	73,293,913
	12 Investments—other securities. See Part IV, line 11	23,254,918	12	24,058,656
	13 Investments—program-related. See Part IV, line 11	0	13	0
	14 Intangible assets	0	14	0
15 Other assets. See Part IV, line 11	0	15	0	
16 Total assets. Add lines 1 through 15 (must equal line 34)	98,010,892	16	103,619,620	
Liabilities	17 Accounts payable and accrued expenses	71,333	17	21,845
	18 Grants payable	0	18	0
	19 Deferred revenue	0	19	0
	20 Tax-exempt bond liabilities	0	20	0
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0	21	0
	22 Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable to unrelated third parties	0	24	0
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	8,199,222	25	8,989,198
	26 Total liabilities. Add lines 17 through 25	8,270,555	26	9,011,043
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	28,847,007	27	26,968,264
	28 Temporarily restricted net assets	56,202,369	28	62,949,352
	29 Permanently restricted net assets	4,690,961	29	4,690,961
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	89,740,337	33	94,608,577
34 Total liabilities and net assets/fund balances	98,010,892	34	103,619,620	

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	10,234,001
2	Total expenses (must equal Part IX, column (A), line 25)	2	11,428,328
3	Revenue less expenses. Subtract line 2 from line 1	3	-1,194,327
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	89,740,337
5	Net unrealized gains (losses) on investments	5	6,062,567
6	Donated services and use of facilities	6	0
7	Investment expenses	7	0
8	Prior period adjustments	8	0
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	94,608,577

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		✓
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	✓	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	✓	
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		✓
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No. 1545-0047

2012

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS	Employer identification number 22-3089640
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Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state: _____
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
 - a Type I b Type II c Type III—Functionally integrated d Type III—Non-functionally integrated
- e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

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

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of monetary support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	7,449,442	8,210,442	6,478,013	4,961,007	8,142,822	35,241,726
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf			0			0
3 The value of services or facilities furnished by a governmental unit to the organization without charge			0			0
4 Total. Add lines 1 through 3	7,449,442	8,210,442	6,478,013	4,961,007	8,142,822	35,241,726
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						2,712,868
6 Public support. Subtract line 5 from line 4.						32,528,858

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4	7,449,442	8,210,442	6,478,013	4,961,007	8,142,822	35,241,726
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2,929,506	1,829,131	1,468,016	1,552,887	1,907,108	9,686,648
9 Net income from unrelated business activities, whether or not the business is regularly carried on			0	0	0	0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)			0	0	0	0
11 Total support. Add lines 7 through 10						44,928,374
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f))	14	72.4 %
15 Public support percentage from 2011 Schedule A, Part II, line 14	15	63.79 %
16a 33 1/3% support test—2012. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input checked="" type="checkbox"/>
b 33 1/3% support test—2011. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
17a 10%-facts-and-circumstances test—2012. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
b 10%-facts-and-circumstances test—2011. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization		<input type="checkbox"/>
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions		<input type="checkbox"/>

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2011 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2012 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2011 Schedule A, Part III, line 17	18	%
19a 33 1/3% support tests—2012. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 33 1/3% support tests—2011. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization <input type="checkbox"/>		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions <input type="checkbox"/>		

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service
Name of the organization

Supplemental Financial Statements

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

OMB No. 1545-0047

2012

Open to Public Inspection

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Employer identification number

22-3089640

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

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	263	292
2 Aggregate contributions to (during year)	3,647,736	4,833,843
3 Aggregate grants from (during year)	6,619,213	2,855,004
4 Aggregate value at end of year	28,682,776	72,250,259
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

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

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

Preservation of land for public use (e.g., recreation or education) Preservation of an historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

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

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

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

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

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

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

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

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

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

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

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

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

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

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$

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

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

a Revenues included in Form 990, Part VIII, line 1 ▶ \$

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

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

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

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

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

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

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

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

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

	Amount
1c Beginning balance	
1d Additions during the year	
1e Distributions during the year	
1f Ending balance	

2a Did the organization include an amount on Form 990, Part X, line 21? **Yes** **No**

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

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	60,390,411	61,196,679	57,891,223	43,674,099	60,086,713
b Contributions	5,027,463	1,542,206	865,847	2,457,947	3,582,298
c Net investment earnings, gains, and losses	5,695,194	799,091	5,941,655	14,899,229	-16,955,268
d Grants or scholarships	2,353,581	2,419,918	2,727,138	2,400,677	2,329,605
e Other expenditures for facilities and programs	0	0	0	0	0
f Administrative expenses	887,782	727,647	774,908	739,375	710,039
g End of year balance	67,871,705	60,390,411	61,196,679	57,891,223	43,674,099

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

- a** Board designated or quasi-endowment ▶ 30 %
- b** Permanent endowment ▶ 40 %
- c** Temporarily restricted endowment ▶ 30 %

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

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

	Yes	No
(i) unrelated organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
(ii) related organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	<input type="checkbox"/>	<input type="checkbox"/>

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

Part VI Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	0	0	0	0
b Buildings	0	0	0	0
c Leasehold improvements	0	0	0	0
d Equipment	0	145,292	140,163	5,129
e Other	0	0	0	0

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) ▶ 5,129

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives	14,640,608	End-of-Year Market Value
(2) Closely-held equity interests	9,418,048	End-of-Year Market Value
(3) Other -----		
(A) -----		
(B) -----		
(C) -----		
(D) -----		
(E) -----		
(F) -----		
(G) -----		
(H) -----		
(I) -----		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.) ▶	24,058,656	

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value	
(1) Federal income taxes		
(2) Agency Funds	6,339,742	
(3) Liability under unitrust agreements	2,649,456	
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
(11)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	8,989,198	

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

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 or 22.

▶ Attach to Form 990.

OMB No. 1545-0047

2012

**Open to Public
Inspection**

Employer identification number

22-3089640

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
(1) Sch I, Stmt 1							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 234
 3 Enter total number of other organizations listed in the line 1 table ▶ 0

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Form: Schedule I

22-3089640

Page: 1

Line Number: Part II

Description of Grants and Other Assistance to Governments and Organizations in the United States

		Amount of cash grant	Amount of non-cash assistance
Name and address	15 40 Connection 53 Otis Street Westborough, MA 01581	25,000	0
EIN	26-2873903		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	General Health		
Name and address	ACT NOW Inc 409 Main Street Amherst, MA 01002	8,000	0
EIN	04-3539167		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Teen Leaders		
Name and address	Alzheimers Dis and Rel Disorders MA 480 Pleasant Street Watertown, MA 02472	10,000	0
EIN	04-2731194		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	AlzheimerEducation		
Name and address	Amelia Park Childrens Museum Inc 29 South BRd St Westfield, MA 01086	6,800	0
EIN	04-3271875		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	American Cancer Society Inc P O Box 720366 Oklahoma City, OK 73162	5,101	0
EIN	13-1788008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	General Health		
Name and address	American International College 1000 State Street Springfield, MA 01109	20,000	0
EIN	04-2103701		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	College Univ		
Name and address	American International College	66,950	0

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

1000 State Street
Springfield, MA 01109

EIN 04-2103701

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	American Red Cross Pioneer Valley 506 Cottage Street Springfield, MA 01104	11,750	0
-------------------------	--	--------	---

EIN 53-0197008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Amherst Cinema Arts Center Inc 28 Amity Street Amherst, MA 01002	21,000	0
-------------------------	--	--------	---

EIN 04-3456950

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts Culture

Name and address	Amherst College P O Box 5000 Amherst, MA 01003	6,800	0
-------------------------	--	-------	---

EIN 04-2103542

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Amherst Education Found Inc P O Box 2237 Amherst, MA 01004	6,250	0
-------------------------	--	-------	---

EIN 04-3250903

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant in honor of the excellent

Name and address	Anti Displacement Project Inc 130 Union Street Springfield, MA 01104	10,000	0
-------------------------	--	--------	---

EIN 04-3098406

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Wage Theft Campaign

Name and address	Appalachian Mountain Club 5 Joy Street Boston, MA 02108	5,500	0
-------------------------	---	-------	---

EIN 04-6001677

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant	Environmental		
Name and address	Babson College 231 Forest Street Babson Park, MA 02457	16,000	0
EIN	04-2103544		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	Bay Path College 588 Longmeadow Street Longmeadow, MA 01106	26,500	0
EIN	04-2103865		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	College Univ		
Name and address	Bay Path College 588 Longmeadow Street Longmeadow, MA 01106	24,200	0
EIN	04-2103865		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	Bay State Reading Institute Inc 114 Jennings Road Holliston, MA 01746	25,000	0
EIN	32-0162008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Westfield Partnership		
Name and address	Baystate Health Foundation Inc 280 Chestnut Street 6th Floor Springfield, MA 01199	86,200	0
EIN	04-3549011		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	General Health		
Name and address	Bennington College Corporation One College Drive Bennington, VT 05201	10,000	0
EIN	03-0179414		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	College Univ		
Name and address	Bentley University 175 Forest St Waltham, MA 02452	21,000	0
EIN	04-1081650		

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Berkshire Children and Families Inc	67,320	0
-------------------------	-------------------------------------	--------	---

480 West St
Pittsfield, MA 01201

EIN 04-2226238

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Berkshire Community College	6,000	0
-------------------------	-----------------------------	-------	---

1350 West Street
Pittsfield, MA 01201

EIN 04-2500539

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Best Buddies Massachusetts	8,000	0
-------------------------	----------------------------	-------	---

45 Bromfield Street 7th Floor
Boston, MA 02108

EIN 52-1615008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Big Br Big Sis Assoc of Frkln Cty	6,617	0
-------------------------	-----------------------------------	-------	---

16 Court Square 3rd Floor
Greenfield, MA 01302

EIN 04-2491950

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant second installment of fund

Name and address	Black Men of Greater Springfield Inc	10,000	0
-------------------------	--------------------------------------	--------	---

P O Box 4342
Springfield, MA 01101

EIN 04-3210338

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant W E B DuBois Academy

Name and address	Boothbay Harbor Memorial Library	10,000	0
-------------------------	----------------------------------	--------	---

4 Oak Street
Boothbay Harbor, ME 04538

EIN 01-0224627

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Library

Name and address	Boothbay Region Land Trust	50,000	0
-------------------------	----------------------------	--------	---

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

137 Townsend Avenue
Boothbay Harbor, ME 04538

EIN 01-0371869

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Boston College 140 Commonwealth Avenue Chestnut Hill, MA 02467	20,000	0
-------------------------	--	--------	---

EIN 04-2103545

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Boston University 881 Commonwealth Avenue Boston, MA 02215	12,500	0
-------------------------	--	--------	---

EIN 04-2103547

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Boys Girls Club of Grtr Holyoke 70 Nick Cosmos Way Holyoke, MA 01041	25,032	0
-------------------------	--	--------	---

EIN 04-2103792

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Youth Developmnt

Name and address	Boys Girls Club of Grtr Westfield 28 West Silver Street Westfield, MA 01086	6,073	0
-------------------------	---	-------	---

EIN 04-2464259

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Immersion Learning

Name and address	Bridgewater State College Tillinghast Hall Bridgewater, MA 02325	9,000	0
-------------------------	--	-------	---

EIN 04-3010428

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Brightside Inc P O Box 9012 Springfield, MA 01102	35,000	0
-------------------------	---	--------	---

EIN 04-2182395

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant Human Services

Name and address Brown University 5,500 0
P O Box 1877
Providence, RI 02912

EIN 05-0258809

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address Bryant University 21,000 0
1150 Douglas Pike
Smithfield, RI 02917

EIN 05-0258810

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Spring scholarship

Name and address Carson Center for Human Services Inc 5,200 0
20 Broad Street
Westfield, MA 01086

EIN 04-2316498

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address Cathedral High School 59,755 0
260 Surrey Road
Springfield, MA 01118

EIN 04-2262360

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address Catholic Charities Ag of Diocese of Spfld 8,455 0
65 Elliot Street
Springfield, MA 01103

EIN 86-1122008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address Center for Human Development Inc 18,700 0
332 Birnie Avenue
Springfield, MA 01107

EIN 04-2503926

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address Center for New Americans 15,000 0
42 Gothic Street
Northampton, MA 01060

EIN 04-3224215

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant With Literacy for All

Name and address	Central Connecticut State Univ 1615 Stanley Street New Britain, CT 06050	10,000	0
-------------------------	--	--------	---

EIN 06-1303381

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Church of God in Christ Fam Ser 35 Alden St Springfield, MA 01109	10,000	0
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EIN 06-1303381

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	City of Northampton 210 Main Street Northampton, MA 01060	22,193	0
-------------------------	---	--------	---

EIN 04-6001406

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts and Culture

Name and address	City of Springfield 36 Court Street Springfield, MA 01103	26,200	0
-------------------------	---	--------	---

EIN 04-6001407

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Old First Church

Name and address	Clarke School for the Deaf 47 Round Hill Road Northampton, MA 01060	21,000	0
-------------------------	---	--------	---

EIN 04-2104008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	College of Our Lady of the Elms 291 Springfield Street Chicopee, MA 01013	15,000	0
-------------------------	---	--------	---

EIN 04-2225850

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address	College of Our Lady of the Elms	45,700	0
-------------------------	---------------------------------	--------	---

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

291 Springfield Street
Chicopee, MA 01013

EIN 04-2225850

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Com Action of Fr Sty N Quabbin 393 Main Street Greenfield, MA 01301	66,061	0
-------------------------	---	--------	---

EIN 04-2384972

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Community Adolescent Resource and 247 Cabot Street Holyoke, MA 01040	19,503	0
-------------------------	--	--------	---

EIN 04-2962882

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Community Enterprises Inc 441 Pleasant Street Northampton, MA 01060	8,300	0
-------------------------	---	-------	---

EIN 51-0179008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Website Design

Name and address	Comy Involved in Sustaining Ag One Sugarloaf Street S Deerfield, MA 01373	20,900	0
-------------------------	---	--------	---

EIN 04-3416862

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Food Nutrition

Name and address	Community Music School of Spfld 127 State Street Springfield, MA 01103	44,687	0
-------------------------	--	--------	---

EIN 22-2501008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts and Culture

Name and address	Com United Way of Pioneer Val 1441 Main Street Springfield, MA 01103	106,349	0
-------------------------	--	---------	---

EIN 04-2152680

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant	Human Services		
Name and address	Community YMCA Greenfield 451 Main Street Greenfield, MA 01301	39,600	0
EIN	04-2149363		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	Congregational Church of Holland 11 Sturbridge Road Holland, MA 01521	6,176	0
EIN	04-3069643		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Religious		
Name and address	Cooley Dickinson Hosp Health Care 30 Locust Street Northampton, MA 01060	36,500	0
EIN	04-2103561		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	General Health		
Name and address	Cornell University P O Box 223623 Pittsburgh, PA 15251	5,750	0
EIN	15-0532082		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	College Univ		
Name and address	Dakin Pioneer Valley Humane Soc P O Box 6307 Springfield, MA 01101	87,248	0
EIN	20-5319008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Animal Related		
Name and address	Dana Farber Cancer Institute Inc 10 Brookline Place West Brookline, MA 02445	5,500	0
EIN	04-2263040		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Sarcoma Unit		
Name and address	Dartmouth Hitchcock Medical Ctr One Medical Center Drive Lebanon, NH 03756	10,000	0
EIN	22-2715008		

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Doctors Without Borders USA Inc	16,850	0
-------------------------	---------------------------------	--------	---

333 Seventh Ave
New York, NY 10001

EIN 13-3433008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Drama Studio Inc	7,600	0
-------------------------	------------------	-------	---

P O Box 80892
Springfield, MA 01138

EIN 22-2823008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts and Culture

Name and address	E Longmeadow Scholarship Found	32,700	0
-------------------------	--------------------------------	--------	---

P O Box 66
E Longmeadow, MA 01028

EIN 04-2592638

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Eric Carle Mus of Picture Book Art	42,750	0
-------------------------	------------------------------------	--------	---

125 West Bay Road
Amherst, MA 01002

EIN 04-3542086

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts Culture

Name and address	Fairfield University	10,000	0
-------------------------	----------------------	--------	---

1073 North Benson Road
Fairfield, CT 06824

EIN 06-0646623

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Dolan School of Business

Name and address	Fairfield University	11,000	0
-------------------------	----------------------	--------	---

1073 North Benson Road
Fairfield, CT 06824

EIN 06-0646623

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Sscholarship

Name and address	Feeding Hills Congl Church	5,101	0
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COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

21 North Westfield Street
Feeding Hills, MA 01030

EIN 04-2311639

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	First Church of Christ in Longmeadow 763 Longmeadow St Longmeadow, MA 01106	9,200	0
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EIN 04-2104075

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	First Cong Church of S Hadley One Church Street S Hadley, MA 01075	17,000	0
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EIN 04-2115501

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	Fitchburg State College 160 Pearl Street Fitchburg, MA 01420	16,000	0
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EIN 04-6002284

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Focus Center for Autism Inc 126 Dowd Avenue Canton, CT 06019	10,000	0
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EIN 31-1724698

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Forest Park Zoological Society Inc 302 Sumner Avenue Springfield, MA 01138	7,700	0
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EIN 04-6145635

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Operations Support

Name and address	Framingham State College 100 State Street Framingham, MA 01701	8,400	0
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EIN 04-6002284

IRC code section 501(C)3

Method of valuation Cash

Description of non-

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COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant Scholarship

Name and address	Franklin Area Survival Center Inc	10,000	0
	96 Fourth Street		
	Turners Falls, MA 01376		

EIN 04-2776526

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Franklin Cty Community Development	21,066	0
	324 Wells Street		
	Greenfield, MA 01301		

EIN 04-2678309

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Refrigeration Project

Name and address	Franklin Cty ComMeals Program	8,000	0
	P O Box 172		
	Greenfield, MA 01302		

EIN 22-3027098

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Orange Food Pantry

Name and address	Franklin County DIAL SELF Inc	10,500	0
	21 Abbott Street		
	Greenfield, MA 01301		

EIN 04-2619617

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant YouthServe Matching Funds

Name and address	Franklin Cty Home Care Corp	10,000	0
	330 Montague City Road		
	Turners Falls, MA 01376		

EIN 04-2542539

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Franklin Land Trust Inc	23,000	0
	679A Mohawk Trail		
	Shelburne Falls, MA 01370		

EIN 22-2744008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Friends of Children Inc	20,500	0
	245 Russell Street		
	Hadley, MA 01035		

EIN 22-2952008

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IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Friends of Grandmother s Garden	5,291	0
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P O Box 1432
Westfield, MA 01086

EIN 04-3267287

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Friends of the Homeless Inc	21,845	0
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755 Worthington Street
Springfield, MA 01105

EIN 22-2787008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Housing

Name and address	Friends of the PVPA High School	32,315	0
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15 Mulligan Drive
S Hadley, MA 01075

EIN 20-2282008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Girls Incorporated of Holyoke	14,860	0
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6 Open Square Way
Holyoke, MA 01041

EIN 04-2748244

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Youth Developmnt

Name and address	Grtr Spfld Senior Services	10,845	0
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66 Industry Avenue
Springfield, MA 01104

EIN 04-2510895

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Greenfield Community College	14,500	0
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One College Drive
Greenfield, MA 01301

EIN 23-7090085

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Greenfield Com College Foundation	74,380	0
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COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

270 Main Street
Greenfield, MA 01301

EIN 04-2449856

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Hampshire Com United Way 71 King Street Northampton, MA 01061	11,100	0
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EIN 04-2104792

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Hampshire County Bar Association 15 Gothic Street Northampton, MA 01060	9,600	0
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EIN 22-3269008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Only One Childhood

Name and address	Hampshire Sheriff s Office 205 Rocky Hill Road Northampton, MA 01061	13,975	0
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EIN 04-6002284

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	HAP Inc 322 Main Street Springfield, MA 01105	17,410	0
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EIN 04-2518368

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Housing

Name and address	Harvard University 8 Garden Street Cambridge, MA 02138	6,500	0
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EIN 04-2103580

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Heath Agricultural Society Inc 21 9 Road Heath, MA 01346	16,125	0
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EIN 04-2607187

IRC code section 501(C)3

Method of valuation Cash

Description of non-

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cash assistance

Purpose of grant Arts and Culture

Name and address	Hilltown Land Trust Inc	20,000	0
	332 Bullitt Road		
	Ashfield, MA 01330		

EIN 22-2831008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Holy Name Church	5,839	0
	323 Dickinson Street		
	Springfield, MA 01108		

EIN 04-2121346

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	Holyoke Catholic High School	30,496	0
	134 Springfield Street		
	Chicopee, MA 01013		

EIN 04-2315532

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Holyoke Community College	49,611	0
	303 Homestead Avenue		
	Holyoke, MA 01040		

EIN 04-2719849

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Holyoke Com College Foundation	22,550	0
	303 Homestead Avenue		
	Holyoke, MA 01040		

EIN 23-7181691

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Holyoke Health Center Inc	12,500	0
	230 Maple St		
	Holyoke, MA 01040		

EIN 04-2492730

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Holyoke Public Library Corp	10,000	0
	335 Maple Street		
	Holyoke, MA 01041		

EIN 04-6002895

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IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Hospice of Franklin County Inc	10,000	0
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329 Conway Street
Greenfield, MA 01301

EIN 20-1612008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Human Resources Unlimited	15,000	0
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120 Maple Street
Springfield, MA 01103

EIN 23-7083008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	International Rescue Committee Inc	5,300	0
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122 East 42nd Street
Washington, DC 20090

EIN 13-5661008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Jackson Street School PTO	9,679	0
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120 Jackson Street
Northampton, MA 01060

EIN 04-3062374

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Jefferson ComCollege Foundation	23,000	0
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1220 Coffeen Street
Watertown, NY 13601

EIN 23-7009906

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Jewish Family Service of Wmass	32,200	0
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15 Lenox St
Springfield, MA 01108

EIN 04-2104352

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Jewish Federation of WMAss	12,450	0
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1160 Dickinson Street
Springfield, MA 01108

EIN 04-2127023

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Johnson and Wales Univ Prov 8 Abbott Park Place Providence, RI 02903	7,250	0
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EIN 05-0306206

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Johnson Evergreen Corporation 201 Chestnut Street Stafford Springs, CT 06076	7,500	0
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EIN 22-3012008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Johnson Memorial Hospital 201 Chestnut Hill Road Stafford Springs, CT 06076	159,834	0
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EIN 06-0646696

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Karuna Center for Peacebuilding Inc 447 West Street Amherst, MA 01002	7,637	0
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EIN 04-3437359

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Community Imprv

Name and address	Kestrel Land Trust P O Box 1016 Amherst, MA 01003	25,241	0
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EIN 04-6243236

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Ko Theater Works Inc 498 South Gulf Road Belchertown, MA 01007	6,000	0
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EIN 04-3124727

IRC code section 501(C)3

Method of valuation Cash

Description of non-

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COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant	Arts and Culture		
Name and address	Link to Libraries Inc 36 Bluegrass Drive E Longmeadow, MA 01028	11,950	0
EIN	26-3156008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Maine Maritime Museum 243 Washington Street Bath, ME 04530	125,000	0
EIN	01-0271477		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Maine Public Broadcasting Corp 1450 Lisbon Street Lewiston, ME 04240	10,000	0
EIN	22-3172008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Mass Adoption Resource Exch 45 Franklin Street Boston, MA 02110	9,000	0
EIN	04-2227431		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Western Mass Child Services		
Name and address	Mass Audubon Society Inc 208 South Great Road Lincoln, MA 01773	8,851	0
EIN	04-2104702		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Environmental		
Name and address	Mass College of Liberal Arts 357 Church Street N Ardams, MA 02147	7,000	0
EIN	04-2660810		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	Mass College of Pharmacy 179 Longwood Avenue Boston, MA 02115	6,000	0
EIN	04-2104700		

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IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	M E Smith Endowment for Ed	18,200	0
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1 Silverwood Terrace

S Hadley, MA 01075

EIN 04-3558819

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Montague Catholic Social Ministries	7,000	0
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41 43 Third Street

Turners Falls, MA 01376

EIN 04-3274078

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant New Horizons - the Bridge

Name and address	Mount Grace Land Conservation Tr	11,000	0
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1461 Old Keene Road

Athol, MA 01331

EIN 04-2938967

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Movin with the Spirit Inc	15,000	0
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P O Box 238

Columbia, CT 06237

EIN 06-1579880

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	NAMI Western Massachusetts Inc	10,000	0
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324A Springfield Street

Agawam, MA 01001

EIN 04-2783175

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Communications Coordinator

Name and address	Natl Confl for Coml and Justice CT WMA	36,600	0
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820A Prospect Hill Road

Windsor, CT 06095

EIN 14-1938008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Community Imprv

Name and address	National Guild for Com Arts Educ	21,000	0
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	520 8th Ave New York, NY 10018		
EIN	13-6161008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Arts and Culture		
Name and address	Natl Multiple Sclerosis Soc N Eng 101A First Avenue Suite 6 Waltham, MA 02451	17,000	0
EIN	04-2178884		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	N Eng Public Radio Foundation 131 County Circle Amherst, MA 01003	485,155	0
EIN	04-6130523		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Arts Culture		
Name and address	New England School of Law 154 Stuart Street Boston, MA 02116	8,000	0
EIN	04-2152671		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	New Pond Farm Education Center 101 Marchant Road W Redding, CT 06896	10,000	0
EIN	06-1110833		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Environmental		
Name and address	New Spirit Inc 40 Riverview Terrace Springfield, MA 01108	45,000	0
EIN	04-3232718		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	New York University 25 West 4th Street New York, NY 10012	7,500	0
EIN	13-5562008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-			

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cash assistance

Purpose of grant	Scholarship		
Name and address	Newbury College 129 Fisher Avenue Brookline, MA 02445	7,000	0
EIN	04-2452884		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	Nichols College of Business Admin 123 Center Road Dudley, MA 01571	425,000	0
EIN	04-2104778		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	College Univ		
Name and address	N Amherst Community Farm Inc P O Box 9648 N Amherst, MA 01059	7,250	0
EIN	11-3757008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Environmental		
Name and address	Northampton Ed Found P O Box 44 Northampton, MA 01061	21,384	0
EIN	04-3157289		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Northampton Public Schools 212 Main Street Room 200 Northampton, MA 01060	10,000	0
EIN	04-6001406		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Northampton Survival Center Inc 265 Prospect Street Northampton, MA 01060	8,700	0
EIN	04-2774166		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Food Nutrition		
Name and address	Northampton Youth and Com Rowing P O Box 1553 Northampton, MA 01060	7,500	0
EIN	04-3532936		

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IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Recreation

Name and address	Northeastern University	19,000	0
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360 Huntington Avenue

Boston, MA 02115

EIN 04-1679980

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Northfield Mount Hermon School	7,500	0
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One Lamplighter Way

Mt Hermon, MA 01354

EIN 04-2109865

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Open Field Foundation Bramble Hill Farm	8,000	0
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593 South Pleasant Street

Amherst, MA 01002

EIN 04-3313646

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Fertile Ground

Name and address	Oxfam America Inc	32,500	0
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226 Causeway Street 5th Flr

Boston, MA 02114

EIN 23-7069110

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Paris Press Inc	20,000	0
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P O Box 487

Ashfield, MA 01330

EIN 04-3302441

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Arts Culture

Name and address	Pathfinder International	20,000	0
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9 Galen Street Suite 217

Watertown, MA 02472

EIN 53-0235008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Pioneer Valley Project Inc	10,500	0
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COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

42 Hobart Street
Springfield, MA 01104

EIN 04-3343623

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Community Imprv

Name and address	Pioneer Valley Habitat for Humanity 140 Pine St Room 9 Florence, MA 01062	10,000	0
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EIN 04-3049506

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Housing

Name and address	Planned Parenthood Leag MA 1055 Commonwealth Avenue Boston, MA 02215	9,600	0
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EIN 04-2698497

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Pocumtuck Valley Memorial Assoc 10 Memorial Street Deerfield, MA 01342	10,000	0
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EIN 04-2147607

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Finding Our Place Engaging

Name and address	Providence Ministries for the Needy 51 Hamilton St Holyoke, MA 01041	15,000	0
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EIN 04-2898893

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Quinnipiac University 275 Mount Carmel Avenue Hamden, CT 06518	20,000	0
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EIN 06-0646701

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address	Reader to Reader Inc 38 Woodside Avenue Amherst, MA 01002	34,000	0
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EIN 03-0496901

IRC code section 501(C)3

Method of valuation Cash

Description of non-

cash assistance

Purpose of grant	Springfield Mentoring Program		
Name and address	Rebuilding Together Springfield Inc 1145 Main Street Suite 111 Springfield, MA 01103	8,455	0
EIN	04-3172737		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Funnel Your Energy 2012		
Name and address	Reg Employ Board of Hampden 1441 Main Street Springfield, MA 01103	94,786	0
EIN	22-2489896		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Talk Read Succeed Program		
Name and address	Rensselaer Polytechnic Institute 110 Eight Street Troy, NY 12180	12,500	0
EIN	14-1340095		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	Riverside Industries Inc One Cottage Street Easthampton, MA 01027	7,000	0
EIN	04-2438444		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Riverside Arts Exchange		
Name and address	River Valley Counseling Center Inc 319 Beech St Holyoke, MA 01041	10,000	0
EIN	04-2174657		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	Roman Catholic Diocese of Spfld 65 Elliot Street Springfield, MA 01101	31,491	0
EIN	04-3437398		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Religious		
Name and address	Safe Passage Inc 43 Center Street Northampton, MA 01060	12,050	0
EIN	04-2690131		

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IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	ServiceNet Inc	18,600	0
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129 King Street
Northampton, MA 01060

EIN 04-2526194

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Shriners Hospitals for Children	5,101	0
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P O Box 31356
Tampa, FL 33631

EIN 36-2193608

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Springfield, MA Unit

Name and address	Smith Voc and Agricultural High Sch	8,000	0
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80 Locust Street
Northampton, MA 01060

EIN 04-6001406

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarships

Name and address	Snow Farm N England Craft Prog	10,000	0
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5 Clary Road
Williamsburg, MA 01096

EIN 06-3547767

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Somers Congregational Church	10,000	0
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599 Main Street
Somers, CT 06071

EIN 13-1957008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	South End Community Center Inc	12,000	0
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PO Box 30192
Springfield, MA 01103

EIN 04-2103854

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	South Hadley Public Library	7,000	0
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Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

27 Bardwell Street
S Hadley, MA 01075

EIN 04-6001303

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Building Fund

Name and address	S Middlesex Opportunity Council 300 Howard Street Framingham, MA 01702	7,000	0
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EIN 04-2389659

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Springfield Boys Girls Club Inc 481 Carew Street Springfield, MA 01104	37,236	0
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EIN 04-1858620

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Youth Developmnt

Name and address	Springfield College 263 Alden Street Springfield, MA 01109	90,647	0
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EIN 04-2104329

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address	Springfield College 263 Alden Street Springfield, MA 01109	20,500	0
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EIN 04-2104329

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Springfield Day Nursery Corporation 1 Federal Street Building 101 Springfield, MA 01105	63,773	0
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EIN 04-2103855

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Springfield Library and Museums 21 Edwards Street Springfield, MA 01103	44,254	0
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EIN 04-6002239

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant	Arts and Culture		
Name and address	Springfield Rescue Mission Inc P O Box 9045 Springfield, MA 01102	10,301	0
EIN	52-1047790		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	Springfield School Volunteers Inc 1550 Main Street Springfield, MA 01103	7,750	0
EIN	04-2643527		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	Springfield Symphony Orchestra 1350 Main Street Suite 12 Springfield, MA 01103	49,003	0
EIN	04-2210746		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Arts Culture		
Name and address	Springfield Tech Com College One Armory Square Springfield, MA 01101	47,325	0
EIN	04-2444774		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	STCC Foundation One Armory Square Ste 1 Springfield, MA 01101	10,000	0
EIN	22-2612044		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	St John Lutheran Church 60 Broad Street Westfield, MA 01085	11,975	0
EIN	04-2381428		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Religious		
Name and address	St Patrick Parish 30 Main Street S Hadley, MA 01075	7,000	0
EIN	04-2106777		

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	St Peter and St Paul Orth Church	11,000	0
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118 Carew Street
Springfield, MA 01101

EIN 04-6000817

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	St Stanislaus Basilica	10,000	0
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566 Front Street
Chicopee, MA 01013

EIN 04-2111408

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	St Stanislaus School	20,406	0
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566 Front Street
Chicopee, MA 01013

EIN 04-2111408

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Stanley Park of Westfield Inc	7,101	0
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P O Box 1191
Westfield, MA 01085

EIN 04-2131404

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Environmental

Name and address	Stavros Ctr for Independent Living	16,000	0
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210 Old Farm Road
Amherst, MA 01002

EIN 51-0172014

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Technology Upgrade Project

Name and address	Stonehill College	7,000	0
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320 Washington Street
Easton, MA 02357

EIN 04-2104229

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Suffolk University	6,000	0
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Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

41 Temple Street
Boston, MA 02114

EIN 04-2133255

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Survival Centers Inc	79,370	0
	138 Sunderland Road		
	N Amherst, MA 01059		

EIN 04-2698462

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Terra Moto Inc	9,500	0
	389 Congress Street		
	Portland, ME 04101		

EIN 13-3512008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Holyoke Works

Name and address	The Assoc For Community Living	40,500	0
	220 Brookdale Drive		
	Springfield, MA 01104		

EIN 04-2210685

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	The Brick House Com Resource	10,000	0
	24 Third Street		
	Turners Falls, MA 01376		

EIN 22-3337776

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Summer Workshop Series

Name and address	The Food Bank of Western Mass	104,450	0
	97 North Hatfield Road		
	Harfield, MA 01038		

EIN 04-2751023

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Food Nutrition

Name and address	The Salvation Army Divisional	6,000	0
	25 Shawmut Road		
	Canton, MA 02021		

EIN 22-2406433

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant Human Services

Name and address	The Yellow House Inc 1479 North Main Street Palmer, MA 01069	75,000	0
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EIN 45-3998008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Third Sector New England Inc 89 South Street Suite 700 Boston, MA 02111	16,434	0
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EIN 04-2261109

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Tilton Fund Inc 75 North Main Street S Deerfield, MA 01373	15,000	0
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EIN 04-6075146

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Tolland Volunteer Fire Dept 162A Colebrook River Road Tolland, MA 01034	9,900	0
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EIN 26-3373008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Woodland Emergency Preparedness

Name and address	Town of Agawam 36 Main Street Agawam, MA 01001	5,101	0
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EIN 04-6001065

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Agawam Public Library

Name and address	Treehouse Foundation Inc One Treehouse Circle Easthampton, MA 01027	6,000	0
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EIN 22-3849008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Youth Development Program

Name and address	Trickle Up Program Inc 104 West 27th Street 12th Floor New York, NY 10001	7,500	0
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EIN 06-1043042

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Trinity College	10,000	0
	300 Summit Street		
	Hartford, CT 06106		

EIN 06-0646927

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Trustees of Dartmouth College	72,585	0
	6066 Development Office		
	Hanover, NH 03755		

EIN 02-0222111

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address	Trustees of Mount Holyoke College	5,312	0
	50 College Street		
	S Hadley, MA 01075		

EIN 04-2103578

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant College Univ

Name and address	Trustees of Noble Hospital Inc	25,000	0
	115 West Silver Street		
	Westfield, MA 01086		

EIN 22-2537008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant General Health

Name and address	Trustees of the Smith College	8,500	0
	College Hall 201		
	Northampton, MA 01063		

EIN 04-1843040

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Museum of Art

Name and address	Trustees of the Smith College	11,550	0
	College Hall 201		
	Northampton, MA 01063		

EIN 04-1843040

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Unitarian Universalist Rowe Camp	7,500	0
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Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

	22 Kings Highway Road Rowe, MA 01367		
EIN	04-2162408		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Woodside Diversity Program		
Name and address	United ARC of Frkln Hamp Cty 111 Summer Street Greenfield, MA 01301	130,000	0
EIN	04-2267562		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	United Way of Franklin County Inc 51 Davis St Greenfield, MA 01301	30,500	0
EIN	04-2212894		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	United Way of Martin County Inc 10 S E Central Parkay Stuart, FL 34995	10,000	0
EIN	23-7274008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Human Services		
Name and address	University of Connecticut 233 Glennbrook Rd Storrs, CT 06269	81,000	0
EIN	60-0772160		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	University of Hartford 200 Bloomfield Avenue W Hartford, CT 06117	25,700	0
EIN	06-0731360		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	University of Kentucky 128 Funkhouser Building Lexington, KY 40505	6,000	0
EIN	61-6001008		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-			

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant	Scholarship		
Name and address	University of Mass Amherst 373 Whitmore Amherst, MA 01003	7,000	0
EIN	04-3167352		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Education		
Name and address	University of Mass Amherst 255 Admin Bldg Amherst, MA 01003	255,400	0
EIN	04-3167352		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	University of Mass Dartmouth 285 Old Westport Road N Dartmouth, MA 02747	15,500	0
EIN	04-3167352		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	University of New Hampshire 11 Garrison Avenue Durnham, NH 03821	9,000	0
EIN	02-6000937		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	University of Rhode Island 35 Campus Avenue Kingston, RI 02881	11,050	0
EIN	05-6000522		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Scholarship		
Name and address	UU Society of Amherst 121 North Pleasant Street Amherst, MA 01004	7,000	0
EIN	04-2103733		
IRC code section	501(C)3		
Method of valuation	Cash		
Description of non-cash assistance			
Purpose of grant	Religious Church		
Name and address	Valley Community Dev Corp 30 Market Street Northampton, MA 01060	10,800	0
EIN	22-2906008		

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Community Imprv

Name and address	Wentworth Institute of Technology	7,200	0
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550 Huntington Avenue

Boston, MA 02115

EIN 04-1958460

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	West Cummington Cong Church	13,000	0
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27 West Main Street

Cummington, MA 01026

EIN 90-0141008

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Religious Church

Name and address	W Mass Council Inc BSA	16,995	0
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1 Arch Road

Westfield, MA 01085

EIN 04-2104279

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Youth Developmnt

Name and address	Western New England University	98,000	0
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1215 Wilbraham Road

Springfield, MA 01119

EIN 04-2108376

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Westfield State University	117,150	0
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577 Western Avenue

Westfield, MA 01085

EIN 04-3062617

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	WGBH Educational Foundation	38,669	0
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44 Hampden Street

Springfield, MA 01103

EIN 04-2104397

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Education

Name and address	Wilbraham Monson Academy	7,277	0
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Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

423 Main Street
 Wilbraham, MA 01095

EIN 04-2105838

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Private School

Name and address	Williston Northampton School 19 Payson Avenue Easthampton, MA 01027	6,000	0
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EIN 04-1975990

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Private School

Name and address	Womanshelter Companeras Inc P O Box 1099 Holyoke, MA 01041	6,500	0
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EIN 04-2716766

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Human Services

Name and address	Women s Fund of W Mass 116 Pleasant Street Ste 358 Easthampton, MA 01027	26,135	0
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EIN 04-3342411

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Community Imprv

Name and address	Worcester Polytechnic Institute 100 Institute Road Worcester, MA 01609	20,000	0
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EIN 04-2121659

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	Worcester State College 486 Chandler Street Worcester, MA 01609	13,500	0
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EIN 04-2760551

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant Scholarship

Name and address	YMCA of Greater Springfield 275 Chestnut Street Suite 1 Springfield, MA 01104	13,540	0
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EIN 04-1859893

IRC code section 501(C)3

Method of valuation Cash

Description of non-

Schedule I, Part IV, Statement 1

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

cash assistance

Purpose of grant Human Services

Name and address	Young Entrepreneurs Society Inc	7,500	0
	26 South Main Street		
	Orange, MA 01364		

EIN 04-3512782

IRC code section 501(C)3

Method of valuation Cash

Description of non-cash assistance

Purpose of grant BizVenture

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service
Name of the organization

Compensation Information
For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees
▶ Complete if the organization answered "Yes" to Form 990,
Part IV, line 23.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No. 1545-0047

2012

**Open to Public
Inspection**

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Employer identification number

22-3089640

Part I Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. <input type="checkbox"/> First-class or charter travel <input type="checkbox"/> Travel for companions <input type="checkbox"/> Tax indemnification and gross-up payments <input type="checkbox"/> Discretionary spending account <input type="checkbox"/> Housing allowance or residence for personal use <input type="checkbox"/> Payments for business use of personal residence <input type="checkbox"/> Health or social club dues or initiation fees <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)		
b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	1b	
2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	2	
3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III. <input type="checkbox"/> Compensation committee <input type="checkbox"/> Independent compensation consultant <input type="checkbox"/> Form 990 of other organizations <input type="checkbox"/> Written employment contract <input type="checkbox"/> Compensation survey or study <input checked="" type="checkbox"/> Approval by the board or compensation committee		
4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:		
a Receive a severance payment or change-of-control payment?	4a	✓
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	✓
c Participate in, or receive payment from, an equity-based compensation arrangement?	4c	✓
If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.		
Only section 501(c)(3) and 501(c)(4) organizations must complete lines 5–9.		
5 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:		
a The organization?	5a	✓
b Any related organization?	5b	✓
If "Yes" to line 5a or 5b, describe in Part III.		
6 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:		
a The organization?	6a	✓
b Any related organization?	6b	✓
If "Yes" to line 6a or 6b, describe in Part III.		
7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	7	✓
8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	8	✓
9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9	

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)–(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)–(D)	(F) Compensation reported as deferred in prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1	(i)	105,293	0	0	0	0	105,293	0
	(ii)	0	0	0	0	0	0	0
2	(i)							
	(ii)							
3	(i)							
	(ii)							
4	(i)							
	(ii)							
5	(i)							
	(ii)							
6	(i)							
	(ii)							
7	(i)							
	(ii)							
8	(i)							
	(ii)							
9	(i)							
	(ii)							
10	(i)							
	(ii)							
11	(i)							
	(ii)							
12	(i)							
	(ii)							
13	(i)							
	(ii)							
14	(i)							
	(ii)							
15	(i)							
	(ii)							
16	(i)							
	(ii)							

**SCHEDULE L
(Form 990 or 990-EZ)**

Department of the Treasury
Internal Revenue Service

Transactions With Interested Persons

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**
▶ **Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No. 1545-0047

2012

Open To Public Inspection

Name of the organization

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Employer identification number

22-3089640

Part I Excess Benefit Transactions (section 501(c)(3) and section 501(c)(4) organizations only).

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected?	
				Yes	No
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958. ▶ \$ _____

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$ _____

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
			(1)									
(2)												
(3)												
(4)												
(5)												
(6)												
(7)												
(8)												
(9)												
(10)												
Total ▶						\$						

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				

**SCHEDULE M
(Form 990)**

Noncash Contributions

OMB No. 1545-0047

2012

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Department of the Treasury
Internal Revenue Service

▶ **Complete if the organizations answered "Yes" on Form
990, Part IV, lines 29 or 30.
▶ Attach to Form 990.**

Name of the organization

Employer identification number

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

22-3089640

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	✓	41	1,420,757	Quotes
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ ()				
26 Other ▶ ()				
27 Other ▶ ()				
28 Other ▶ ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement **29** **0**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1–28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?		✓
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?	✓	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		✓
b If "Yes," describe in Part II.		
33 If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

OMB No. 1545-0047

2012

**Open to Public
Inspection**

Name of the organization

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Employer identification number

22-3089640

Form 990, Part VI, Section A, Line 2 - Certain Foundation Trustees provide professional services to other Foundation Trustees

Form 990, Part VI, Section B, Line 11b - Members of the Foundation's Audit and Finance Committee are provided adraft copy of the Form 990 as prepared by the Chief Financial Officer and staff. The committee members are provided an opportunity to read the form and to inquire about and discuss any item reported therein. All such inquiries are satisfactorily resolved by the committee after which time a final copy of the Form 990 is made available to the Board of Trustees and then Form 990 is filed with the IRS.

Form 990, Part VI, Section B, Line 12c - Each year all trustees and senior staff are required to complete a conflict of interest statement. These statements are reviewed and monitored with regard to any vote by the trustees.

Form 990, Part VI, Section B, Line 15 - The Personnel Committee of the Board of Trustees to Foundation Trustees is responsible for determining the President's salary. All other salaries are reviewed and monitored by this committee with management input.

Form 990, Part VI, Section C, Line 19 - Summary financial information is available in the Foundation's annual report which is in print and available on the website. The Form 990 is available on the Foundation's website. All other information is available upon request.

**SCHEDULE R
(Form 990)**

Related Organizations and Unrelated Partnerships

OMB No. 1545-0047

2012

**Open to Public
Inspection**

Department of the Treasury
Internal Revenue Service

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

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization

COMMUNITY FOUNDATION OF WESTERN MASSACHUSETTS

Employer identification number

22-3089640

Part I Identification of Disregarded Entities (Complete if the organization answered "Yes" to Form 990, Part IV, line 33.)

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) <u>Community Foundation of Western Mass LLC</u> <u>1500 Main Street Suite 2300, Springfield, MA 01115</u>	Vehicle to hold real estate	DE	0	0	N/A
(2)					
(3)					
(4)					
(5)					
(6)					

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							

Part III Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) -----												
(2) -----												
(3) -----												
(4) -----												
(5) -----												
(6) -----												
(7) -----												

Part IV Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" to Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) -----									
(2) -----									
(3) -----									
(4) -----									
(5) -----									
(6) -----									
(7) -----									

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

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

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a** Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties or **(iv)** rent from a controlled entity **1a**
- b** Gift, grant, or capital contribution to related organization(s) **1b**
- c** Gift, grant, or capital contribution from related organization(s) **1c**
- d** Loans or loan guarantees to or for related organization(s) **1d**
- e** Loans or loan guarantees by related organization(s) **1e**

- f** Dividends from related organization(s) **1f**
- g** Sale of assets to related organization(s) **1g**
- h** Purchase of assets from related organization(s) **1h**
- i** Exchange of assets with related organization(s) **1i**
- j** Lease of facilities, equipment, or other assets to related organization(s) **1j**

- k** Lease of facilities, equipment, or other assets from related organization(s) **1k**
- l** Performance of services or membership or fundraising solicitations for related organization(s) **1l**
- m** Performance of services or membership or fundraising solicitations by related organization(s) **1m**
- n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) **1n**
- o** Sharing of paid employees with related organization(s) **1o**

- p** Reimbursement paid to related organization(s) for expenses **1p**
- q** Reimbursement paid by related organization(s) for expenses **1q**

- r** Other transfer of cash or property to related organization(s) **1r**
- s** Other transfer of cash or property from related organization(s) **1s**

	Yes	No
1a		
1b		
1c		
1d		
1e		
1f		
1g		
1h		
1i		
1j		
1k		
1l		
1m		
1n		
1o		
1p		
1q		
1r		
1s		

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

	(a) Name of other organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

Part VI **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" to Form 990, Part IV, line 37.)

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under section 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	
(1)													
(2)													
(3)													
(4)													
(5)													
(6)													
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(14)													
(15)													
(16)													

