

For calendar year 2020, or tax year beginning 07-01-2020 , and ending 06-30-2021

Name of foundation STONELEIGH FOUNDATION		A Employer identification number 37-1526458
Number and street (or P.O. box number if mail is not delivered to street address) 123 S BROAD STREET NO 1630	Room/suite	B Telephone number (see instructions) (215) 735-7080
City or town, state or province, country, and ZIP or foreign postal code PHILADELPHIA, PA 19109		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 112,697,623	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	567,851	567,851	567,851	
	4 Dividends and interest from securities	1,341,363	1,341,363	1,341,363	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	3,412,296			
	b Gross sales price for all assets on line 6a 19,185,373				
	7 Capital gain net income (from Part IV, line 2)		3,412,296		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	27,606	0	27,606	
	12 Total. Add lines 1 through 11	5,349,116	5,321,510	1,936,820	
	13 Compensation of officers, directors, trustees, etc.	254,241	0	0	254,241
	14 Other employee salaries and wages	584,433	0	0	582,506
	15 Pension plans, employee benefits	172,758	0	0	172,613
	16a Legal fees (attach schedule)	1,989	0	0	1,989
	b Accounting fees (attach schedule)	22,454	0	0	18,489
	c Other professional fees (attach schedule)	471,355	448,241	0	23,104
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	451,039	0	0	57,067
	19 Depreciation (attach schedule) and depletion	10,211	0	0	
	20 Occupancy	90,062	0	0	90,062
	21 Travel, conferences, and meetings	14,144	0	0	14,144
	22 Printing and publications				
	23 Other expenses (attach schedule)	79,513	0	0	87,555
	24 Total operating and administrative expenses. Add lines 13 through 23	2,152,199	448,241	0	1,301,770
	25 Contributions, gifts, grants paid	2,416,846			2,162,019
	26 Total expenses and disbursements. Add lines 24 and 25	4,569,045	448,241	0	3,463,789
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	780,071			
	b Net investment income (if negative, enter -0-)		4,873,269		
c Adjusted net income (if negative, enter -0-)				1,936,820	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		56,072	63,420	63,420
	2	Savings and temporary cash investments		2,464,906	6,832,368	6,832,368
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		14,182	13,437	13,437
	10a	Investments—U.S. and state government obligations (attach schedule)		16,178,299	13,378,344	13,378,344
	b	Investments—corporate stock (attach schedule)		51,331,182	71,531,470	71,531,470
	c	Investments—corporate bonds (attach schedule)		4,486,855	3,145,803	3,145,803
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)		13,119,751	17,722,801	17,722,801
	14	Land, buildings, and equipment: basis ▶ 104,958 Less: accumulated depreciation (attach schedule) ▶ 94,978		20,191	9,980	9,980
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		87,671,438	112,697,623	112,697,623	
Liabilities	17	Accounts payable and accrued expenses		104,514	133,082	
	18	Grants payable		2,057,511	2,319,213	
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)		113,000	442,000	
	23	Total liabilities (add lines 17 through 22).		2,275,025	2,894,295	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions		85,396,413	109,803,328	
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)		85,396,413	109,803,328	
30	Total liabilities and net assets/fund balances (see instructions) .		87,671,438	112,697,623		

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1 85,396,413
2	Enter amount from Part I, line 27a	2 780,071
3	Other increases not included in line 2 (itemize) ▶ _____	3 23,626,844
4	Add lines 1, 2, and 3	4 109,803,328
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6 109,803,328

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a PNC CUSTODY		P		
b PNC MID CAP		P		
c PNC LARGE CAP		P		
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 9,646,594		7,179,477	2,467,117	
b 5,756,410		5,716,077	40,333	
c 3,782,369		2,877,523	904,846	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			2,467,117	
b			40,333	
c			904,846	
d				
e				
Capital gain net income or (net capital loss)		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	3,412,296
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		{	3	0

Part V

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

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved		
(a) Reserved	(b) Reserved	(c) Reserved
2 Reserved		2
3 Reserved.		3
4 Reserved		4
5 Reserved		5
6 Reserved		6
7 Reserved		7
8 Reserved		8

Part VII

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.		
	Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved	1	67,738
All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	67,738
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	67,738
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	44,494
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	42,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	86,494
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	531
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	18,225
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded	11	0
	18,225		

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
1c				No
c	Did the foundation file Form 1120-POL for this year?			No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV	9	Yes	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶STONELEIGHFOUNDATION.ORG	13	Yes	
14	The books are in care of ▶EXECUTIVE DIRECTOR Telephone no. ▶(215) 735-7080 Located at ▶123 S BROAD STREET NO 1630 PHILADELPHIA PA 19109 ZIP+4 ▶			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
	a At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
	b If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes

☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.

☐ Yes

☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes

☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance check here.

☐

c

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

☐ Yes

☐ No

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes

☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

☐ Yes

☒ No

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

☐ Yes

☒ No

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Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

☐ Yes

☒ No

Yes

No

5b

No

6b

No

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
KATHERINE H CHRISTIANO C/O THE ORGANIZATION PHILADELPHIA, PA 19109	CHAIR 2.00	0	0	0
LAURA WILLIAMSON C/O THE ORGANIZATION PHILADELPHIA, PA 19109	TREASURER 2.00	0	0	0
JODY GREENBLATT C/O THE ORGANIZATION PHILADELPHIA, PA 19109	SECRETARY 1.00	0	0	0
CATHERINE CARR C/O THE ORGANIZATION PHILADELPHIA, PA 19109	VICE CHAIR 1.00	0	0	0
CAROL HAAS GRAVAGNO C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
STACY HOLLAND C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
MATTHEW HURFORD C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
WENDELL PRITCHETT C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
MATT SCHAENEN C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
KEVIN BETHEL C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0
RONNIE BLOOM C/O THE ORGANIZATION PHILADELPHIA, PA 19109	EXECUTIVE DIRECTOR 32.00	191,793	47,285	0
ALICE DUBOW ESQ C/O THE ORGANIZATION PHILADELPHIA, PA 19109	DIRECTOR 1.00	0	0	0

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MARIE WILLIAMS C/O THE ORGANIZATIONS ADDRESS PHILADELPHIA, P A 19109	DEPUTY DIRECTOR 40.00	134,264	27,395	0
JANET KROLL C/O THE ORGANIZATIONS ADDRESS PHILADELPHIA, P A 19109	STRATEGY & PLANNING 40.00	111,712	24,407	0
SANGEETA PRASED C/O THE ORGANIZATIONS ADDRESS PHILADELPHIA, P A 19109	STONELEIGH FELLOW 40.00	123,853	6,787	0
RONA NAVERA C/O THE ORGANIZATIONS ADDRESS PHILADELPHIA, P A 19109	DIRECTOR OF ADMINSTR 40.00	91,944	25,299	0
ANN MARIE MCGRORY C/O THE ORGANIZATIONS ADDRESS PHILADELPHIA, P A 19109	COMMUNICATIONS MANAG 40.00	83,732	16,661	0
Total number of other employees paid over \$50,000.				8

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Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 IN OPERATING THE FELLOWSHIP PROGRAMS, THE FOUNDATION SEEKS TO: -AFFECT THE WELL-BEING OF CHILDREN AND YOUTH; -INVEST IN POLICY CHANGE, PRACTICE IMPROVEMENT, AND RESEARCH DISSEMINATION;-SUPPORT INDIVIDUALS WHO CAN MAKE A DIFFERENCE IN THE LIVES OF VULNERABLE CHILDREN; -SPUR INNOVATION THAT LINKS THE MAJOR PUBLIC SYSTEMS SERVING YOUNG PEOPLE;CHILD WELFARE, EDUCATION, AND JUVENILE JUSTICE;-MAKE A SIGNIFICANT AGGREGATE DIFFERENCE IN THE FIELD THROUGH THE CREATION OF A COMMUNITY OF FELLOWS ENGAGED IN PROJECTS TACKLING SIMILAR PROBLEMS THROUGH A VARIETY OF APPROACHES.	3,463,789
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	96,396,343
b	Average of monthly cash balances.	1b	3,880,902
c	Fair market value of all other assets (see instructions).	1c	12,113
d	Total (add lines 1a, b, and c).	1d	100,289,358
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	100,289,358
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,248,489
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	98,040,869
6	Minimum investment return. Enter 5% of line 5.	6	4,902,043

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

1	Minimum investment return from Part X, line 6.	1	
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	3,463,789
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,463,789
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,463,789

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

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.				
c From 2017.				
d From 2018.				
e From 2019.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ _____				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2020 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2016				
b Excess from 2017				
c Excess from 2018.				
d Excess from 2019				
e Excess from 2020				

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling

2006-11-18

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☒ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2020	(b) 2019	(c) 2018	(d) 2017	
		1,936,820	2,129,146	2,355,853	3,439,023	9,860,842
b	85% of line 2a	1,646,297	1,809,774	2,002,475	2,923,170	8,381,716
c	Qualifying distributions from Part XII, line 4 for each year listed	3,463,789	3,047,231	3,048,125	2,929,632	12,488,777
d	Amounts included in line 2c not used directly for active conduct of exempt activities	0	0	0	0	0
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	3,463,789	3,047,231	3,048,125	2,929,632	12,488,777
3	Complete 3a, b, or c for the alternative test relied upon:					
a	"Assets" alternative test—enter:					
	(1) Value of all assets					0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	3,268,029	2,896,692	2,908,355	2,896,403	11,969,479
c	"Support" alternative test—enter:					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					0
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
	(3) Largest amount of support from an exempt organization					0
	(4) Gross investment income					0

Part XV

Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

RONNIE BLOOM EXECUTIVE DIRECTOR
C/O THE FOUNDATIONS CORPORATE OFFICE
PHILADELPHIA, PA 19109
(215) 735-7080

b

The form in which applications should be submitted and information and materials they should include:

SEE GRANT PROCEDURES ON WEBSITE

c

Any submission deadlines:

SEE GRANT PROCEDURES ON WEBSITE

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

SEE GRANT PROCEDURES ON WEBSITE

Part XV

Supplementary Information (continued)

3

Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
YHEP HEALTH CENTER (CAMERON MCCONKEY) 178 GRAPE STREET PHILADELPHIA, PA 19102		P C	RESEARCH FELLOWSHIP	89,500
HPC (DIJONEE TALLEY) 1500 MARKET STREET PHILADELPHIA, PA 19102		P C	RESEARCH FELLOWSHIP	91,656
LEWIS KATZ SCHOOL OF MEDICINE (JESSICA BEARD) 3440 NORTH BROAD STREET PHILADELPHIA, PA 19140		P C	RESEARCH FELLOWSHIP	175,000
CHOP (KALI HACKETT) 1315 WALNUT STREET SUITE 400 PHILADELPHIA, PA 19107		P C	RESEARCH FELLOWSHIP	86,505
TEMPLE (KARISSA PHELPS) 1719 NORTH BROAD STREET PHILADELPHIA, PA 19122		P C	RESEARCH FELLOWSHIP	90,154
DREXEL (LEAH BROGAN) 400 MARKET STREET SUITE 200 PHILADELPHIA, PA 19106		P C	RESEARCH FELLOWSHIP	81,357
CHILDREN'S HOSPITAL OF PHILADELPHIA (NADIA DOWCHEN) 2716 SOUTH STREET PHILADELPHIA, PA 19146		P C	RESEARCH FELLOWSHIP	189,169
NICOLE SMITH-KEA 1500 TERRELL ROAD SHADY SIDE, MD 20733		I	RESEARCH FELLOWSHIP	175,000
COLUMBIA UNIVERSITY JUSTICE LAB (PATRICK MCCARTHY) 6037 HOLLINS AVE BALTIMORE, MD 21210		P C	RESEARCH FELLOWSHIP	132,325
CHILDREN'S HOSPITAL OF PHILADELPHIA (RUTH ABAYA) 2716 SOUTH STREET PHILADELPHIA, PA 19146		P C	RESEARCH FELLOWSHIP	147,452
KASEY THOMPSON 325 NORTH 39TH STREET PHILADELPHIA, PA 19104		I	RESEARCH FELLOWSHIP	62,874
GEORGETOWN UNIVERSITY (SHAY BILCHIK) 500 FIRST STREET NW 4TH FL WASHINGTON, DC 20001		P C	RESEARCH FELLOWSHIP	160,872
SANGEETA PRASEED 1424 CHESTNUT STREET PHILADELPHIA, PA 19102		I	RESEARCH FELLOWSHIP	153,656
THE TRUSTEES OF THE UNIVERSITY OF PA (VINCENT REINA) 3815 WALNUT STREET PHILADELPHIA, PA 19104		P C	RESEARCH FELLOWSHIP	169,283
RHONDA MCKITTEN 178 GRAPE STREET PHILADELPHIA, PA 19102		I	RESEARCH FELLOWSHIP	41,216
JUVENILE LAW CENTER 1800 JFK BLVD SUITE 1900B PHILADELPHIA, PA 19103		P C	JLC YOUTH ADVOCACY GRANT	35,000
LA PUERTA ABIERTA INC N HOWARD STREET PHILADELPHIA, PA 19122		P C	RAPID RESPONSE GRANT	30,000
URBED 1315 WALNUT STREET PHILADELPHIA, PA 19107		P C	RAPID REPOSE GRANT	30,000
SLOUGHT FOUNDATION 4017 WALNUT STREET PHILADELPHIA, PA 19104		P C	OPPORTUNITY FUND GRANT	58,600
CULTURETRUST GREATER PHILADELPHIA 1315 WALNUT STREET SUITE 320 PHILADELPHIA, PA 19107		P C	OPPORTUNITY FUND GRANT	57,400
LESLIE ACOCA GOODCHILD 1117 SIR FRANCIS BLAKE BLVD 5 KENTFIELD, CA 94904		I	OPPORTUNITY FUND GRANT	10,000
ROCK TO THE FUTURE 1201 NORTH 3RD STREET 283 PHILADELPHIA, PA 19122		P C	OPPORTUNITY FUND GRANT	10,000
YOUTH SERVICE INC 410 N 34TH STREET PHILADELPHIA, PA 19104		P C	OPPORTUNITY FUND GRANT	25,000

MEVEMENT ALLIANCE PROJECT 924 CHERRY ST FL 5 PHILADELPHIA,PA 19107		P C	OPPORTUNITY FUND GRANT	25,000
COMMON JUSTICE 540 ATLANTIC AVE SUITE 4 BROOKLYN,NY 11217		P C	OPPORTUNITY FUND GRANT	10,000
UNIVERSITY OF LOS ANGELES (DOMINQUE MIKELL) 405 HILGARD AVENUE LOS ANGELES,CA 90095		P C	OPPORTUNITY FUND GRANT	10,000
RUTGERS UNIVERSITY (CATHERINE BUTTNER) 406 PENN STREET CAMDEN,NJ 08102		P C	OPPORTUNITY FUND GRANT	10,000
PHILADELPHIA FIGHT 1233 LOCUST STREET PHILADELPHIA,PA 19107		P C	OPPORTUNITY FUND GRANT	5,000
Total ▶ 3a				2,162,019
b <i>Approved for future payment</i>				
NATIONAL NETWORK FOR YOUTH (ANTHONY SIMPSON) 781 8TH STREET SE WASHINGTON,DC 20003		P C	RESEARCH FELLOWSHIP	164,000
YHEP HEALTH CENTER (CAMERON MCCONKEY) 178 GRAPE STREET PHILADELPHIA,PA 19102		P C	RESEARCH FELLOWSHIP	18,043
HEALTH ALLIANCE FOR VIOLENCE INTERVENTION (JANENE BROWN) 101 HUDSON STREET SUITE 2100 JERSEY CITY,NJ 07302		P C	RESEARCH FELLOWSHIP	167,776
LEWIS KATZ SCHOOL OF MEDICINE (JESSICA BEARD) 3440 NORTH BROAD STREET PHILADELPHIA,PA 19140		P C	RESEARCH FELLOWSHIP	350,000
LA PUERTA ABIERTA (JULIA MCINTYRE) N HOWARD STREET PHILADELPHIA,PA 19122		P C	RESEARCH FELLOWSHIP	165,168
CHOP (KALI HACKETT) 1315 WALNUT STREET SUITE 400 PHILADELPHIA,PA 19107		P C	RESEARCH FELLOWSHIP	18,349
TEMPLE (KARISSA PHELPS) 1719 NORTH BROAD STREET PHILADELPHIA,PA 19122		P C	RESEARCH FELLOWSHIP	17,468
DREXEL (LEAH BROGAN) 400 MARKET STREET SUITE 200 PHILADELPHIA,PA 19106		P C	RESEARCH FELLOWSHIP	27,882
GEORGETOWN UNIVERSITY (MEGHAN OGLE) 500 FIRST STREET NW 4TH FL WASHINGTON,DC 20001		P C	RESEARCH FELLOWSHIP	171,796
CENTER FOR BLACK EDUCATOR DEVELOPMENT (MALCOM DAVIS) 7901 HIDDEN LANE ELKINS PARK,PA 19027		P C	RESEARCH FELLOWSHIP	170,272
CHILDREN'S HOSPITAL OF PHILADELPHIA (NADIA DOWCHEN) 2716 SOUTH STREET PHILADELPHIA,PA 19146		P C	RESEARCH FELLOWSHIP	175,000
NICOLE SMITH-KEA 1500 TERRELL ROAD SHADY SIDE,MD 20733		I	RESEARCH FELLOWSHIP	350,000
CHILDREN'S HOSPITAL OF PHILADELPHIA (RUTH ABAYA) 2716 SOUTH STREET PHILADELPHIA,PA 19146		P C	RESEARCH FELLOWSHIP	308,306
SANGEETA PRASEED 1424 CHESTNUT STREET PHILADELPHIA,PA 19102		I	RESEARCH FELLOWSHIP	63,725
THE TRUSTEES OF THE UNIVERSITY OF PA (VINCENT REINA) 3815 WALNUT STREET PHILADELPHIA,PA 19104		P C	RESEARCH FELLOWSHIP	184,654
Total ▶ 3b				2,352,439

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue:				
a _____				
b _____				
c _____				
d _____				
e _____				
f _____				
g Fees and contracts from government agencies				
2 Membership dues and assessments.				
3 Interest on savings and temporary cash investments				
		14	567,851	
4 Dividends and interest from securities				
		14	1,341,363	
5 Net rental income or (loss) from real estate:				
a Debt-financed property.				
b Not debt-financed property.				
6 Net rental income or (loss) from personal property				
7 Other investment income.				
8 Gain or (loss) from sales of assets other than inventory				
		18	3,412,296	
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a _____		01	27,606	
b _____				
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e).				
	0		5,349,116	
13 Total. Add line 12, columns (b), (d), and (e).				
13 5,349,116				
(See worksheet in line 13 instructions to verify calculations.)				

[illegible]

Part XVII

Yes	No
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[illegible]

1a(1)		No
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1b(1)		No
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1b(2)		No
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1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

arket value

[illegible]☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

2021-12-05

Title

May the IRS discuss this return with the preparer shown below
(see instr.) ☒ Yes ☐ No

Print/Type preparer's name

Preparer's Signature

Date _____

Check if self-employed ☐

PTIN

P00749373

Firm's name ► BBD LLP

Firm's EIN ► 23-289669

Firm's address ► 1835 MARKET STREET 3RD FLOOR

Phone no.
(215) 567-7770

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description
--

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION
EIN: 37-1526458

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING/AUDIT	22,454	0	0	18,489

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Explanation: IN ACCORDANCE WITH REG. 53.4942(A)-2(C)(3)(IV), THE ABOVE REFERENCED FOUNDATION IS EXCLUDING FROM ITS MINIMUM INVESTMENT RETURN (MIR) CALCULATION A TOTAL OF \$2,248,489 IN CASH THAT IT DEEMS HELD FOR CHARITABLE ACTIVITIES. THIS AMOUNT IS IN EXCESS OF 1.5% OF THE FAIR MARKET VALUE OF THE FOUNDATION'S NOCHARITABLE-USE ASSETS. THE FOLLOWING INFORMATION IS SUBMITTED IN SUPPORT OF THE EXCLUSION FROM MIR OF THIS AMOUNT. 1. FAIR MARKET VALUE OF FOUNDATION'S NONCHARITABLE-USE ASSETS: \$100,289,3562. 1.5% OF LINE 1: \$1,504,3403. FACTS AND CIRCUMSTANCES JUSTIFYING THE EXCLUSION OF AN AMOUNT IN EXCESS OF THE AMOUNT IN LINE 2: FOR THE PAST THREE YEARS THE FOUNDATION HAS INCURRED EXPENDITURES FOR CHARITABLE PURPOSES OF \$2,926,195 (6/30/18), \$3,022,727 (6/30/19) AND \$3,045,034 (6/30/20) FOR AN AVERAGE OF \$2,248,489 IN ORDER TO CONDUCT ITS CHARITABLE ACTIVITIES.

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Identifier	Return Reference	Explanation
	FORM 990-PF, PAGE 10, PART XV, LINE 2	FORM 990-PF, PAGE 10, PART XV, LINES 2B AND 2D GRANT GUIDELINES THE STONELEIGH FELLOWSHIP IS DESIGNED TO SUPPORT RESEARCHERS, PRACTITIONERS, AND POLICYMAKERS WHO HAVE DEMONSTRATED LEADERSHIP IN VIOLENCE PREVENTION, CHILD WELFARE, JUVENILE JUSTICE, OR RELATED FIELDS. WE ARE PARTICULARLY INTERESTED IN INDIVIDUALS WHOSE FELLOWSHIP PROPOSAL INVOLVES WORK THAT CROSSES SYSTEMS OR ENHANCES THE COORDINATION OF SERVICE DELIVERY. ACCOMPLISHED PRACTITIONERS, POLICYMAKERS, AND RESEARCHERS WHO HAVE DEMONSTRATED LEADERSHIP IN VIOLENCE PREVENTION, JUVENILE JUSTICE, CHILD WELFARE OR ALLIED FIELDS (E.G. EDUCATION, HEALTH AND BEHAVIORAL HEALTH AS THEY RELATE TO DEPENDENT AND DELINQUENT POPULATIONS) ARE ENCOURAGED TO APPLY. CANDIDATES MIGHT BE PRACTITIONERS IN YOUTH- OR FAMILY-SERVING ORGANIZATIONS OR SYSTEMS, OR POLICYMAKERS, ANALYSTS OR RESEARCHERS WORKING IN NON-PROFIT, GOVERNMENTAL OR ACADEMIC INSTITUTIONS. WE SEEK INDIVIDUALS WHO HAVE: A TRACK RECORD OF ADVOCATING FOR CHANGE IN THE FIELDS OF CHILD WELFARE AND JUVENILE JUSTICE. KNOWLEDGE, UNDERSTANDING, CONTACTS, AND INSTITUTIONAL SUPPORT TO BRING CHANGES TO FRUITION. DEMONSTRATED ABILITY TO DESIGN AND LEAD SYSTEM REFORM. IMAGINATION, TOUGH-MINDEDNESS, AND A FOCUS ON RESULTS. A PASSION FOR THEIR WORK. THE COMMITMENT OF A STRONG PARTNER ORGANIZATION THAT WILL HOST THE FELLOW AND THE PROJECT, PROVIDING BOTH INFRASTRUCTURE AND STRATEGIC ADVICE AND SUPPORT. THE STONELEIGH FELLOWSHIP AWARD IS FLEXIBLE AND TAILORED TO THE NEEDS OF EACH SUCCESSFUL APPLICANT. THE AMOUNT OF THE FINANCIAL AWARD WILL DEPEND ON THE PERSONAL CIRCUMSTANCES OF EACH FELLOW AND PROJECT. Awardees are expected to devote full time to the Stoneleigh Fellowship. Therefore, each award typically includes salary, benefits, and a small stipend to cover project-related travel goals. For some fellows based in academic institutions, the award covers a portion of their time. Because our fellowship supports individual fellows through salary support, they are determined on a case-by-case basis. To date, fellowship budgets have fallen between \$80,000-\$130,000/year. The term of the award varies from fellow-to-fellow based on the needs of each project. To date, fellowship terms have ranged from one to five years. We have awarded only one five-year fellowship. The average term is three years. In addition to candidates' professional qualifications, Stoneleigh selects fellows based on the quality of proposed ideas, the fit of proposed projects with the foundation's focus and goals, and the likelihood that the proposed work can be carried out effectively. A diverse review committee evaluates each proposal. Specific criteria to be used in judging proposals include: Significance: The proposed work effectively addresses critical program, policy or research issues and thus is likely to improve the life outcomes of youth impacted by violence or those involved with or at risk of involvement with the child welfare and juvenile justice systems. Effectiveness: The proposal specifically indicates how the project will effectively promote systems change and how it has the potential to improve youth outcomes. Candidates indicate clearly their personal effectiveness in being able to carry out the work. Feasibility: The scope of the project fits within the time and resources allotted by the fellowship. Candidates indicate that they have the support of a strong partner organization and representatives from the public systems necessary to achieve the project goals. They have other funding if needed. Innovation: The proposed project clearly advances strategies that represent a departure from standard practice. If a candidate is applying for funds to continue an ongoing project, the proposal shows how this fellowship will substantially improve standard practice and why Stoneleigh Foundation support is critical to advancing the work. Multi-disciplinary impact/breadth: The proposed work has the potential to be applied broadly and improve youth policy and practice across a number of systems and disciplines. Fit: The project clearly meets our overall goals. The proposal and candidate contribute to building a community of fellows and a body of work that will, in aggregate, advance the field.
	FORM 5471 FILING EXPLANATION	PURSUANT TO PAGE 5 OF THE INSTRUCTIONS FOR FORM 5471, ITEM E PLEASE NOTE THE FOLLOWING: THE 2020 FORM 5471 FILING REQUIREMENTS FOR STONELEIGH FOUNDATION HAVE BEEN SATISFIED BY CHARLES P. KEATES, 717 S. COLUMBUS BLVD., APT 1203, PHILADELPHIA, PA 19147, SSN XXX-XX-XXXX, WITH THE FILING OF A CONSOLIDATED FORM 5471 WITH THE IRS SERVICE CENTER IN PHILADELPHIA, PA.

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	3,145,803	3,145,803

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCKS	41,882,816	41,882,816
EQUITY MUTUAL FUNDS	29,648,654	29,648,654

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

**US Government Securities - End of
Year Book Value:**

13,378,344

**US Government Securities - End of
Year Fair Market Value:**

13,378,344

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION
EIN: 37-1526458

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
OTHER	FMV	17,722,801	17,722,801

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION
EIN: 37-1526458

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	1,989	0	0	1,989

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BOARD EXPENSES	408	0	0	408
OFFICE SUPPLIES	4,289	0	0	10,117
IT/NETWORK SUPPORTS	11,712	0	0	11,712
OTHER EXPENSES	51,688	0	0	51,688
MEMEBERSHIP FEE	9,387	0	0	9,387
INSURANCE	2,029	0	0	4,243

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
	27,606		27,606

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Description	Amount
UNREALIZED CHANGE IN ASSETS	23,626,844

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Description	Beginning of Year - Book Value	End of Year - Book Value
DEFERRED FEDERAL EXCISE TAX	113,000	442,000

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER PROFESSIONAL FEES	20,000	0	0	20,000
PAYROLL PROCESSING	3,104	0	0	3,104
INVESTMENT FEES	448,251	448,241	0	0
STRATEGY ASSESSMENT	0	0	0	0

TY 2020 IRS 990 e-File Render

Name: STONELEIGH FOUNDATION

EIN: 37-1526458

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	57,067	0	0	57,067
EXCISE TAXES	393,972	0	0	0