

**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)**2010****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 2010 calendar year, or tax year beginning 7/01, 2010, and ending 6/30, 2011**B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Terminated  
☐ Amended return  
☐ Application pending

SAN DIEGO SOCIETY OF NATURAL HISTORY  
 PO BOX 121390  
 SAN DIEGO, CA 92112

**D** Employer Identification Number

95-1643375

**E** Telephone number

619-232-3821

**G** Gross receipts \$ 11,199,120.

**F** Name and address of principal officer: SUSAN LOVEALL  
 SAME AS C ABOVE

**H(a)** Is this a group return for affiliates? ☐ Yes ☒ No**H(b)** Are all affiliates included?If 'No,' attach a list. (see instructions) ☐ Yes ☒ No**I** Tax-exempt status ☒ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ WWW.SDNHM.ORG**H(c)** Group exemption number ▶**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of Formation:**M** State of legal domicile: CA**Part I Summary**

<b>Activities &amp; Governance</b>	1 Briefly describe the organization's mission or most significant activities: <u>TO INTERPRET THE NATURAL WORLD THROUGH RESEARCH, EDUCATION AND EXHIBITS; TO PROMOTE UNDERSTANDING OF THE EVOLUTION AND DIVERSITY OF SOUTHERN CALIFORNIA AND THE PENINSULA OF BAJA CALIFORNIA; AND TO INSPIRE IN ALL A RESPECT FOR NATURE AND THE ENVIRONMENT.</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)	32		
	4	Number of independent voting members of the governing body (Part VI, line 1b)	32		
	5	Total number of individuals employed in calendar year 2010 (Part V, line 2a)	134		
	6	Total number of volunteers (estimate if necessary)	739		
<b>Revenue</b>	7a	Total unrelated business revenue from Part VIII, column (C), line 12	203,995.		
	7b	Net unrelated business taxable income from Form 990-T, line 34	-71,845.		
		<b>Prior Year</b>	<b>Current Year</b>		
	8	Contributions and grants (Part VIII, line 1h)	6,093,649.	4,423,644.	
	9	Program service revenue (Part VIII, line 2g)	6,475,880.	4,832,150.	
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	67,852.	197,976.	
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	634,011.	198,648.	
	12	Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12)	13,271,392.	9,652,418.	
	<b>Expenses</b>	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	283,757.	42,748.
		14	Benefits paid to or for members (Part IX, column (A), line 4)		
15		Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	5,154,472.	4,315,939.	
16a		Professional fundraising fees (Part IX, column (A), line 11e)			
b		Total fundraising expenses (Part IX, column (D), line 25) ▶ 1,163,230.			
17		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	8,862,125.	7,002,404.	
18		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	14,300,354.	11,361,091.	
19		Revenue less expenses. Subtract line 18 from line 12	-1,028,962.	-1,708,673.	
<b>Net Assets or Fund Balances</b>	20	Total assets (Part X, line 16)	Beginning of Current Year 41,123,635.	End of Year 40,541,062.	
	21	Total liabilities (Part X, line 26)	17,288,468.	16,412,918.	
	22	Net assets or fund balances. Subtract line 21 from line 20	23,835,167.	24,128,144.	

**Part II Signature Block**

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

**Sign Here**

Signature of officer

Date

SUSAN LOVEALL

CFO/COO

Type or print name and title.

**Paid Preparer Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

CHRISTOPHER M. ROBERTS

CHRISTOPHER M. ROBERTS

N/A

Firm's name

▶ WEST RHODE &amp; ROBERTS

Firm's address

 ▶ 3104 FOURTH AVE  
 SAN DIEGO, CA 92103

Firm's EIN ▶ N/A

Phone no. 619-615-5380

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No**BAA** For Paperwork Reduction Act Notice, see the separate instructions.

TEEA0113L 12/21/10

Form **990** (2010)

**Part III Statement of Program Service Accomplishments**Check if Schedule O contains a response to any question in this Part III. ☒ **X****1** Briefly describe the organization's mission:

TO INTERPRET THE NATURAL WORLD THROUGH RESEARCH, EDUCATION AND EXHIBITS; TO PROMOTE  
UNDERSTANDING OF THE EVOLUTION AND DIVERSITY OF SOUTHERN CALIFORNIA AND THE PENINSULA  
OF BAJA CALIFORNIA; AND TO INSPIRE IN ALL A RESPECT FOR NATURE AND THE ENVIRONMENT.

**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 exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts 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 \$ 3,715,920. including grants of \$ ) (Revenue \$ 2,522,958.)

EXHIBITS: PRESERVATION AND DISPLAY OF NATURAL OBJECTS DOCUMENTING THE GEOLOGICAL  
HISTORY AND BIODIVERSITY OF THE REGION FOR PUBLIC BENEFIT.

**4b** (Code: ) (Expenses \$ 3,437,542. including grants of \$ ) (Revenue \$ 1,898,917.)

SCIENCE: PROFESSIONAL STUDY OF THE REGION'S PALEONTOLOGICAL HISTORY AND CURRENT  
BIODIVERSITY TO FURTHER PUBLIC UNDERSTANDING AND CONSERVATION.

**4c** (Code: ) (Expenses \$ 1,618,876. including grants of \$ ) (Revenue \$ 198,250.)

EDUCATION: EDUCATIONAL PROGRAMS ON NATURE AND NATURAL SCIENCE, PARTICULARLY OF  
SOUTHERN CALIFORNIA AND BAJA CALIFORNIA.

**4d** Other program services. (Describe in Schedule O.) SEE SCHEDULE O(Expenses \$ 158,852. including grants of \$ ) (Revenue \$ )**4e** Total program service expenses ► 8,931,190.

**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)? If 'Yes,' complete Schedule A .....	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors? (see instructions) .....	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I .....		X
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If 'Yes,' complete Schedule C, Part II .....		X
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If 'Yes,' complete Schedule C, Part III .....		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I .....		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II .....		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III .....	X	
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV .....		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V .....	X	
11 If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI .....	X	
b Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII .....		X
c Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII .....		X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX .....	X	
e Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X .....	X	
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If 'Yes,' complete Schedule D, Part X .....	X	
12a Did the organization obtain separate, independent audited financial statements for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII .....	X	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If 'Yes,' and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional. ....		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E .....		X
14a Did the organization maintain an office, employees, or agents outside of the United States? .....		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If 'Yes,' complete Schedule F, Parts I and IV .....	X	
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? If 'Yes,' complete Schedule F, Parts II and IV .....	X	
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? If 'Yes,' complete Schedule F, Parts III and IV .....		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I (see instructions) .....		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II .....		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III .....		X
20 a Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H .....		X
b If 'Yes' to line 20a, did the organization attach its audited financial statements to this return? <b>Note.</b> Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions) .....		

**Part IV Checklist of Required Schedules (continued)**

	21	Yes	No
<b>21</b> Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II.</i>	21		X
<b>22</b> 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>	22		X
<b>23</b> 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>	23	X	
<b>24a</b> 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, and 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>	24a		X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
<b>d</b> Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?	24d		
<b>25a Section 501(c)(3) and 501(c)(4) organizations.</b> 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>	25a		X
<b>b</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>	25b		X
<b>26</b> Was a loan to or by a current or former officer, director, trustee, key employee, highly 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>	26		X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If 'Yes,' complete Schedule L, Part III.</i>	27		X
<b>28</b> 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):			
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i>	28a		X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV.</i>	28b		X
<b>c</b> 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>	28c		X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M.</i>	29		X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M.</i>	30		X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I.</i>	31		X
<b>32</b> 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>	32		X
<b>33</b> 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>	33		X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1.</i>	34		X
<b>35</b> Is any related organization a controlled entity within the meaning of section 512(b)(13)?	35		X
<b>a</b> 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> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2.</i>	36		X
<b>37</b> 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>	37		X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O.	38	X	

BAA

Form 990 (2010)

**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
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.	<b>1a</b> 30		
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	<b>1b</b> 0		
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>1c</b>	X	
<b>2a</b> 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.	<b>2a</b> 134		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	<b>2b</b>	X	
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. (see instructions)			
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>	X	
<b>b</b> If 'Yes' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.	<b>3b</b>	X	
<b>4a</b> 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)?	<b>4a</b>		X
<b>b</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.			
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>		X
<b>c</b> If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>		
<b>6a</b> 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?	<b>6a</b>		X
<b>b</b> If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
<b>a</b> 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?	<b>7a</b>	X	
<b>b</b> If 'Yes,' did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>	X	
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>		X
<b>d</b> If 'Yes,' indicate the number of Forms 8282 filed during the year.	<b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	<b>8</b>		
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
<b>a</b> Did the organization make any taxable distributions under section 4966?	<b>9a</b>		
<b>b</b> Did the organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter:			
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12.	<b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	<b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
<b>a</b> Gross income from members or shareholders.	<b>11a</b>		
<b>b</b> Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	<b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>		
<b>b</b> If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.	<b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state?	<b>13a</b>		
<b>Note.</b> See the instructions for additional information the organization must report on Schedule O.			
<b>b</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.	<b>13b</b>		
<b>c</b> Enter the amount of reserves on hand.	<b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>		X
<b>b</b> If 'Yes,' has it filed a Form 720 to report these payments? If 'No,' provide an explanation in Schedule O.	<b>14b</b>		



**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. ☒ **X****Section A. Governing Body and Management**

	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year. .... <b>1a</b> 32		
<b>b</b> Enter the number of voting members included in line 1a, above, who are independent .... <b>1b</b> 32		
<b>2</b> 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? .....	<b>2</b>	X
<b>3</b> 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? .....	<b>3</b>	X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....	<b>4</b>	X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? .....	<b>5</b>	X
<b>6</b> Does the organization have members or stockholders? ... SEE SCHEDULE O .....	<b>6</b>	X
<b>7a</b> Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? ... SEE SCHEDULE O .....	<b>7a</b>	X
<b>b</b> Are any decisions of the governing body subject to approval by members, stockholders, or other persons? .....	<b>7b</b>	X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b> The governing body? .....	<b>8a</b>	X
<b>b</b> Each committee with authority to act on behalf of the governing body? .....	<b>8b</b>	X
<b>9</b> Is there any officer, director or 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 .....	<b>9</b>	X

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

	Yes	No
<b>10a</b> Does the organization have local chapters, branches, or affiliates? .....	<b>10a</b>	X
<b>b</b> If 'Yes,' does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization? .....	<b>10b</b>	
<b>11a</b> Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form? .....	<b>11a</b>	X
<b>b</b> Describe in Schedule O the process, if any, used by the organization to review this Form 990. SEE SCHEDULE O .....		
<b>12a</b> Does the organization have a written conflict of interest policy? If 'No,' go to line 13 .....	<b>12a</b>	X
<b>b</b> Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....	<b>12b</b>	X
<b>c</b> Does the organization regularly and consistently monitor and enforce compliance with the policy? If 'Yes,' describe in Schedule O how this is done ... SEE SCHEDULE O .....	<b>12c</b>	X
<b>13</b> Does the organization have a written whistleblower policy? .....	<b>13</b>	X
<b>14</b> Does the organization have a written document retention and destruction policy? .....	<b>14</b>	X
<b>15</b> 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?		
<b>a</b> The organization's CEO, Executive Director, or top management official. SEE SCHEDULE O .....	<b>15a</b>	X
<b>b</b> Other officers of key employees of the organization .....	<b>15b</b>	X
If 'Yes' to line 15a or 15b, describe the process in Schedule O. (See instructions.) .....		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .....	<b>16a</b>	X
<b>b</b> If 'Yes,' has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? .....	<b>16b</b>	

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed ▶ CA

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

☐ Own website    ☐ Another's website    ☒ Upon request

**19** Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. SEE SCHEDULE O

**20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization:

▶ SUSAN LOVEALL 1288 EL PRADO SAN DIEGO CA 92101 619-255-0213

**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****1 a** 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 (describe hours for related organizations in Schedule O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JEFF BLOCK TRUSTEE	1	X						0.	0.	0.
(2) ANITA BUSQUETS TRUSTEE	1	X						0.	0.	0.
(3) DARLENE DAVIES TRUSTEE	1	X						0.	0.	0.
(4) WALT DAVIS TRUSTEE	1	X						0.	0.	0.
(5) JOHN DOWNING TRUSTEE	1	X						0.	0.	0.
(6) SUSAN EVANCO TRUSTEE	1	X						0.	0.	0.
(7) RONNE FROMAN TRUSTEE	1	X						0.	0.	0.
(8) ALLISON HENDERSON TRUSTEE	1	X						0.	0.	0.
(9) MATT HOM M.D TRUSTEE	1	X						0.	0.	0.
(10) ALLEN M. JONES TRUSTEE	1	X						0.	0.	0.
(11) STEVE A. KAY, PH.D TRUSTEE	1	X						0.	0.	0.
(12) JEFFREY KENT TRUSTEE	1	X						0.	0.	0.
(13) PETER KOVACS TRUSTEE	1	X						0.	0.	0.
(14) STEVEN MCDONALD TRUSTEE	1	X						0.	0.	0.
(15) TERRY MOORE TRUSTEE	1	X						0.	0.	0.
(16) DENNIS MORGAN TRUSTEE	1	X						0.	0.	0.
(17) JEROME NAVARRA TRUSTEE	1	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (describe hours for related organizations in Sch O)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) ROBERT PROULX TRUSTEE	1	X						0.	0.	0.
(19) YOLANDA WALTHER-MEADE TRUSTEE	1	X						0.	0.	0.
(20) CAROL WILSON TRUSTEE	1	X						0.	0.	0.
(21) JEFF WITT TRUSTEE	1	X						0.	0.	0.
(22) PAUL DAYTON TRUSTEE	1	X						0.	0.	0.
(23) ELLEN ZINN TRUSTEE	1	X						0.	0.	0.
(24) FLEMING, TOM TRUSTEE	1	X						0.	0.	0.
(25) HAZARD, TOM TRUSTEE	1	X						0.	0.	0.
(26) PALISOUL, PAM TRUSTEE	1	X						0.	0.	0.
(27) RHODES, BRYCE TRUSTEE	1	X						0.	0.	0.
(28) YANG, MARY TRUSTEE	1	X						0.	0.	0.
(29) ROBERT ARMSTRONG TREASURER	1	X		X				0.	0.	0.
<b>1 b Sub-total</b>								0.	0.	0.
<b>c Total from continuation sheets to Part VII, Section A</b>								560,123.	0.	17,702.
<b>d Total (add lines 1b and 1c)</b>								560,123.	0.	17,702.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **4**

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If 'Yes,' complete Schedule J for such individual.</i>		X
<b>4</b> For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If 'Yes' complete Schedule J for such individual.</i>	X	
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If 'Yes,' complete Schedule J for such person.</i>		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation

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



# 2010

Name of the Organization

SAN DIEGO SOCIETY OF NATURAL HISTORY

Employer Identification number

95-1643375

**Part VII Continuation: Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

[illegible]

**Part VIII Statement of Revenue**

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
<b>CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS</b>	<b>1a</b> Federated campaigns .....	<b>1a</b>				
	<b>b</b> Membership dues .....	<b>1b</b>				
	<b>c</b> Fundraising events .....	<b>1c</b>				
	<b>d</b> Related organizations .....	<b>1d</b>				
	<b>e</b> Government grants (contributions) ....	<b>1e</b> 715,331.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b> 3,708,313.				
	<b>g</b> Noncash contributions included in lns 1a-1f: \$ .....					
<b>h Total.</b> Add lines 1a-1f .....			4,423,644.			
<b>PROGRAM SERVICE REVENUE</b>	<b>Business Code</b>					
	<b>2a</b> ADMISSIONS .....	900099	2,318,963.	2,318,963.		
	<b>b</b> GRANTS AND CONTRACTS .....	900099	1,898,917.	1,898,917.		
	<b>c</b> MEMBERSHIP DUES & ASSESSMENTS .....	713990	416,020.	416,020.		
	<b>d</b> EDUCATION .....	611600	198,250.	198,250.		
	<b>e</b> .....					
	<b>f</b> All other program service revenue .....					
<b>g Total.</b> Add lines 2a-2f .....			4,832,150.			
<b>OTHER REVENUE</b>	<b>3</b> Investment income (including dividends, interest and other similar amounts) .....		186,277.			186,277.
	<b>4</b> Income from investment of tax-exempt bond proceeds .....					
	<b>5</b> Royalties .....					
	<b>6a</b> Gross Rents .....	(i) Real (ii) Personal				
	<b>b</b> Less: rental expenses .....					
	<b>c</b> Rental income or (loss) .....					
	<b>d</b> Net rental income or (loss) .....					
	<b>7a</b> Gross amount from sales of assets other than inventory .....	(i) Securities (ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses .....					
	<b>c</b> Gain or (loss) .....					
	<b>d</b> Net gain or (loss) .....		11,699.	11,699.		
	<b>8a</b> Gross income from fundraising events (not including: \$ .....					
	of contributions reported on line 1c, See Part IV, line 18. .... <b>a</b>					
	<b>b</b> Less: direct expenses .....	<b>b</b>				
	<b>c</b> Net income or (loss) from fundraising events .....					
	<b>9a</b> Gross income from gaming activities. See Part IV, line 19. .... <b>a</b>					
	<b>b</b> Less: direct expenses .....	<b>b</b>				
<b>c</b> Net income or (loss) from gaming activities .....						
<b>10a</b> Gross sales of inventory, less returns and allowances .....	<b>a</b> 399,555.					
<b>b</b> Less: cost of goods sold .....	<b>b</b> 543,250.					
<b>c</b> Net income or (loss) from sales of inventory .....		-143,695.	-143,695.			
<b>Miscellaneous Revenue</b>		<b>Business Code</b>				
<b>11a</b> FACILITY RENTAL .....		203,995.		203,995.		
<b>b</b> OTHER INCOME .....	900099	138,348.	138,348.			
<b>c</b> .....						
<b>d</b> All other revenue .....						
<b>e Total.</b> Add lines 11a-11d .....			342,343.			
<b>12 Total revenue.</b> See instructions .....			9,652,418.	4,838,502.	203,995.	186,277.

**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) but are not required to complete columns (B), (C), and (D).

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 U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16	42,748.	42,748.		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	334,234.	273,313.	1,298.	59,623.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.	0.	0.	0.
7 Other salaries and wages	3,210,249.	2,625,119.	12,462.	572,668.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	60,800.			60,800.
9 Other employee benefits				
10 Payroll taxes	710,656.	584,253.		126,403.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other				
12 Advertising and promotion	381,071.	25.	377,208.	3,838.
13 Office expenses	35,056.	19,124.	8,603.	7,329.
14 Information technology				
15 Royalties				
16 Occupancy	668,650.	622,275.	46,185.	190.
17 Travel	222,475.	215,804.	2,001.	4,670.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	616,955.	520,029.	81,809.	15,117.
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	1,591,154.	1,330,635.	245,046.	15,473.
23 Insurance	1,538,583.	1,313,419.	200,762.	24,402.
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24f. If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O.)				
a PROFESSIONAL FEES	511,512.	318,763.	154,222.	38,527.
b GUESS PASS REDEMPTION	193,186.	193,186.		
c HOST EXPENSE	191,512.	36,036.		155,476.
d FILM	189,591.	188,967.	604.	20.
e EXHIBIT MATERIALS	130,381.	130,381.		
f All other expenses	732,278.	517,113.	136,471.	78,694.
25 Total functional expenses. Add lines 1 through 24f	11,361,091.	8,931,190.	1,266,671.	1,163,230.
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720). Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year
<b>ASSETS</b>	<b>1</b> Cash — non-interest-bearing .....	793,902.	<b>1</b>	368,608.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....	439,988.	<b>3</b>	407,226.
	<b>4</b> Accounts receivable, net .....	467,136.	<b>4</b>	608,443.
	<b>5</b> Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		<b>5</b>	
	<b>6</b> 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) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....	365,527.	<b>7</b>	551,214.
	<b>8</b> Inventories for sale or use .....	165,017.	<b>8</b>	48,695.
	<b>9</b> Prepaid expenses and deferred charges .....	1,018,329.	<b>9</b>	1,051,715.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 42,407,766.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 16,805,202.		
		27,080,084.	<b>10c</b>	25,602,564.
	<b>11</b> Investments — publicly traded securities .....	8,727,851.	<b>11</b>	9,470,257.
	<b>12</b> Investments — other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments — program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
<b>15</b> Other assets. See Part IV, line 11 .....	2,065,801.	<b>15</b>	2,432,340.	
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	41,123,635.	<b>16</b>	40,541,062.	
<b>LIABILITIES</b>	<b>17</b> Accounts payable and accrued expenses .....	2,146,919.	<b>17</b>	2,051,254.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....	28,783.	<b>19</b>	57,549.
	<b>20</b> Tax-exempt bond liabilities .....	13,181,886.	<b>20</b>	12,738,107.
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....	345,215.	<b>23</b>	1,419,448.
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....	148,303.	<b>24</b>	
	<b>25</b> Other liabilities. Complete Part X of Schedule D .....	1,437,362.	<b>25</b>	146,560.
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	17,288,468.	<b>26</b>	16,412,918.
<b>NET ASSETS OR FUND BALANCES</b>	<b>Organizations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29 and lines 33 and 34.</b>			
	<b>27</b> Unrestricted net assets .....	10,727,625.	<b>27</b>	11,155,339.
	<b>28</b> Temporarily restricted net assets .....	2,004,941.	<b>28</b>	1,472,226.
	<b>29</b> Permanently restricted net assets .....	11,102,601.	<b>29</b>	11,500,579.
	<b>Organizations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>			
	<b>30</b> Capital stock or trust principal, or current funds .....		<b>30</b>	
	<b>31</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>31</b>	
	<b>32</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>32</b>	
	<b>33</b> <b>Total net assets or fund balances.</b> .....	23,835,167.	<b>33</b>	24,128,144.
	<b>34</b> <b>Total liabilities and net assets/fund balances.</b> .....	41,123,635.	<b>34</b>	40,541,062.

BAA

Form 990 (2010)

**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	9,652,418.
2	Total expenses (must equal Part IX, column (A), line 25)	2	11,361,091.
3	Revenue less expenses. Subtract line 2 from line 1	3	-1,708,673.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	23,835,167.
5	Other changes in net assets or fund balances (explain in Schedule O). SEE SCHEDULE O	5	2,001,650.
6	Net assets or fund balances at end of year. Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	24,128,144.

**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?		X
b Were the organization's financial statements audited by an independent accountant?	X	
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.	X	
d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued 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		
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?		X
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.		

BAA

Form 990 (2010)

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

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

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

OMB No. 1545-0047

**2010**

**Open to Public  
Inspection**

Name of the organization

SAN DIEGO SOCIETY OF NATURAL HISTORY

Employer identification number

95-1643375

**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 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 11g.
- a ☐ Type I      b ☐ Type II      c ☐ Type III — Functionally integrated      d ☐ Type III — Other
- 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
11 g (i)		
11 g (ii)		
11 g (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 column (i) listed in your governing document?		(v) Did you notify the organization in column (i) of your support?		(vi) Is the organization in column (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
(A)									
(B)									
(C)									
(D)									
(E)									
Total									

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

Schedule A (Form 990 or 990-EZ) 2010



**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) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include 'unusual grants'.)	5,836,039.	7,020,870.	4,929,607.	6,504,282.	4,839,664.	29,130,462.
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf.						0.
3 The value of services or facilities furnished by a governmental unit to the organization without charge.						0.
4 <b>Total.</b> Add lines 1 through 3.	5,836,039.	7,020,870.	4,929,607.	6,504,282.	4,839,664.	29,130,462.
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).						7,014,733.
6 <b>Public support.</b> Subtract line 5 from line 4.						22,115,729.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
7 Amounts from line 4.	5,836,039.	7,020,870.	4,929,607.	6,504,282.	4,839,664.	29,130,462.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources.	725,813.	508,863.	108,295.	67,852.	186,277.	1,597,100.
9 Net income from unrelated business activities, whether or not the business is regularly carried on.						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) SEE PART IV.	456,816.	349,551.	347,453.	550,104.	138,348.	1,842,272.
11 <b>Total support.</b> Add lines 7 through 10.						32,569,834.
12 Gross receipts from related activities, etc. (see instructions).					12	0.
13 <b>First five years.</b> 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 <b>stop here.</b> ▶ <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2010 (line 6, column (f) divided by line 11, column (f)).	14	67.9 %
15 Public support percentage from 2009 Schedule A, Part II, line 14.	15	63.5 %
16a <b>33-1/3% support test – 2010.</b> If the organization did not check the box on line 13, and the line 14 is 33-1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization. ▶ <input checked="" type="checkbox"/>		
b <b>33-1/3% support test – 2009.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization. ▶ <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances test – 2010.</b> 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 <b>stop here.</b> 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 <b>10%-facts-and-circumstances test – 2009.</b> 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 <b>stop here.</b> 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 <b>Private foundation.</b> 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"/>		

BAA

Schedule A (Form 990 or 990-EZ) 2010

**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 yr beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
<b>1</b> Gifts, grants, contributions and membership fees received. (Do not include any 'unusual grants'.) .....						
<b>2</b> 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. ....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513. ....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. ....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge. ....						
<b>6 Total.</b> Add lines 1 through 5. ....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons. ....						
<b>b</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. ....						
<b>c</b> Add lines 7a and 7b. ....						
<b>8 Public support.</b> (Subtract line 7c from line 6.) .....						

**Section B. Total Support**

Calendar year (or fiscal yr beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
<b>9</b> Amounts from line 6. ....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. ....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. ....						
<b>c</b> Add lines 10a and 10b. ....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on. ....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.) .....						

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

<b>15</b> Public support percentage for 2010 (line 8, column (f) divided by line 13, column (f)).	<b>15</b>	%
<b>16</b> Public support percentage from 2009 Schedule A, Part III, line 15.	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2010</b> (line 10c, column (f) divided by line 13, column (f)).	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2009</b> Schedule A, Part III, line 17.	<b>18</b>	%

**19a 33-1/3% support tests — 2010.** If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

**b 33-1/3% support tests — 2009.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization. ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions. ☐

**Part IV** **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

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2010

## SCHEDULE A, PART IV - SUPPLEMENTAL INFORMATION PAGE 5

CLIENT 06838

SAN DIEGO SOCIETY OF NATURAL HISTORY

95-1643375

5/15/12

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## PART II, LINE 10 - OTHER INCOME

NATURE AND SOURCE	2010	2009	2008	2007	2006
OTHER INCOME	138,348.	550,104.	347,453.	349,551.	456,816.
TOTAL	<u>\$ 138,348.</u>	<u>\$ 550,104.</u>	<u>\$ 347,453.</u>	<u>\$ 349,551.</u>	<u>\$ 456,816.</u>

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**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, lines 6, 7, 8, 9, 10, 11, or 12.**  
► **Attach to Form 990.** ► **See separate instructions.**

OMB No. 1545-0047

**2010**

**Open to Public  
Inspection**

Employer identification number

SAN DIEGO SOCIETY OF NATURAL HISTORY

95-1643375

**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.....		
2 Aggregate contributions to (during year).....		
3 Aggregate grants from (during year).....		
4 Aggregate value at end of year.....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?..... <input 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 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).

<input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)	<input type="checkbox"/> Preservation of an historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> 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 XIV, 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.

1 a 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 XIV, the text of the footnote to its financial statements that describes these items. **SEE PART XIV**

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 XIV. SEE PART XIV

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 organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1 a 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 XIV and complete the following table:

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

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

b If 'Yes,' explain the arrangement in Part XIV.

**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
1 a Beginning of year balance	11,102,601.	9,968,311.	10,459,123.		
b Contributions	366,539.	701,700.	5,449.		
c Net investment earnings, gains, and losses	31,439.	432,590.	-496,261.		
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	11,500,579.	11,102,601.	9,968,311.		

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ☐ %  
 b Permanent endowment ☒ 100.00 %  
 c Term endowment ☐ %

3 a 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	3a(i) X	
(ii) related organizations	3a(ii)	X

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

4 Describe in Part XIV the intended uses of the organization's endowment funds. SEE PART XIV

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

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1 a Land				
b Buildings		32,034,374.	10,595,633.	21,438,741.
c Leasehold improvements		2,543,608.	1,560,422.	983,186.
d Equipment		6,869,017.	4,328,891.	2,540,126.
e Other		960,767.	320,256.	640,511.
<b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				25,602,564.

BAA

Schedule D (Form 990) 2010



**Part VII Investments—Other Securities.** See Form 990, Part X, line 12. N/A

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

**Part VIII Investments—Program Related.** (See Form 990, Part X, line 13) N/A

(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, column (B) line 13.)		

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

(a) Description	(b) Book value
(1) BENEFICIAL INTEREST IN PERPETUAL TRUST	2,432,339.
(2) COLLECTIONS AND EXHIBITS	1.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, column (B), line 15)	2,432,340.

**Part X Other Liabilities.** (See Form 990, Part X, line 25)

(a) Description of liability	(b) Amount
(1) Federal income taxes	
(2) CAPITAL LEASE OBLIGATION	146,560.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. (Column (b) must equal Form 990, Part X, column (B) line 25)	146,560.

2. FIN 48 (ASC 740) Footnote. In Part XIV, 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). SEE PART XIV

**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	9,652,418.
2	Total expenses (Form 990, Part IX, column (A), line 25)	11,361,091.
3	Excess or (deficit) for the year. Subtract line 2 from line 1	-1,708,673.
4	Net unrealized gains (losses) on investments	2,001,650.
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV)	
9	Total adjustments (net). Add lines 4 through 8	2,001,650.
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9	292,977.

**Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

1	Total revenue, gains, and other support per audited financial statements	1	12,011,041.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	2,001,650.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV) SEE PART XIV	2d	543,250.
e	Add lines 2a through 2d	2e	2,544,900.
3	Subtract line 2e from line 1	3	9,466,141.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV) SEE PART XIV	4b	186,277.
c	Add lines 4a and 4b	4c	186,277.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	9,652,418.

**Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

1	Total expenses and losses per audited financial statements	1	11,904,341.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV) SEE PART XIV	2d	543,250.
e	Add lines 2a through 2d	2e	543,250.
3	Subtract line 2e from line 1	3	11,361,091.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	11,361,091.

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

\_\_ **PART III, LINE 1A - E/S FOOTNOTE FOR ART, TREASURES, ETC.** \_\_

\_\_ THE MUSEUM HOUSES OVER NINE MILLION NATURAL HISTORY SPECIMENS IN COLLECTIONS DATING \_\_

\_\_ BACK AS FAR AS THE 1870S. THE SPECIMENS INCLUDE PLANTS, BIRDS, MAMMALS, INSECTS, \_\_

\_\_ REPTILES, AMPHIBIANS, MARINE INVERTEBRATES, FOSSILS, AND MINERALS MAINLY FROM WESTERN \_\_

\_\_ UNITED STATES, BAJA CALIFORNIA, AND NORTHERN MEXICO. IN ADDITION, THE MUSEUM'S \_\_

\_\_ LIBRARY INCLUDES SOME 25,000 TITLES IN 90,000 VOLUMES WITH SEVERAL SIGNIFICANT AND \_\_

\_\_ RARE VOLUMES ON NATURAL HISTORY. THE MUSEUM'S COLLECTIONS ARE EXPENSED WHEN \_\_

ACQUIRED.

**Part XIV** Supplemental Information (continued)**PART III, LINE 4 - DESCRIPTION OF ORGANIZATION'S COLLECTIONS AND HOW FURTHERS EXEMPT PURPO**

THE MUSEUM'S COLLECTIONS TOTAL APPROXIMATELY 9.2 MILLION SPECIMENS, SOME DATING FROM THE 1800S. THE COLLECTIONS AND RELATED RESEARCH ARE CENTERED AROUND THE SOUTHERN CALIFORNIA/BAJA REGION. THE COLLECTIONS REPRESENT A RICH AND VITAL SOURCE FOR INVESTIGATIONS IN MANY OF THE FUNDAMENTAL ARENAS OF MODERN BIOLOGICAL SCIENCES, SUCH AS CLIMATE CHANGE, EVOLUTION, BIODIVERSITY AND ECOLOGY.

**PART V, LINE 4 - INTENDED USES OF ENDOWMENT FUND**

THE MUSEUM'S ENDOWMENT FUNDS ARE RESTRICTED TO USE PER THE REQUEST OF THE DONORS. A LARGE PORTION OF THE FUNDS ARE RESTRICTED TO SUPPORT THE MUSEUM'S SCIENTIFIC RESEARCH AND RELATED COLLECTIONS.

**PART X - FIN 48 FOOTNOTE**

THE MUSEUM, A CALIFORNIA NOT-FOR-PROFIT CORPORATION, IS EXEMPT FROM TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND SECTION 23701(D) OF THE STATE REVENUE AND TAXATION CODE. THE FINANCIAL ACCOUNTING STANDARDS BOARD (FASB) ISSUED ACCOUNTING STANDARDS CODIFICATION NO. 140-10 (FORMERLY FASB INTERPRETATION NO. 48), ACCOUNTING FOR UNCERTAINTIES IN INCOME TAX, WHICH SETS A MINIMUM THRESHOLD FOR FINANCIAL STATEMENT RECOGNITION OF THE BENEFIT OF A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE MUSEUM HAS REVIEWED ITS POSITIONS FOR ALL OPEN TAX YEARS AND HAS DETERMINED THAT NO PROVISION FOR INCOME TAX POSITIONS IS REQUIRED.

**Part XIV** Supplemental Information *(continued)*

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**2010****SCHEDULE D, PART XIV - SUPPLEMENTAL INFORMATION PAGE 4****CLIENT 06838****SAN DIEGO SOCIETY OF NATURAL HISTORY****95-1643375**

5/15/12

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**SCHEDULE D, PART XII, LINE 2D****OTHER REVENUE INCLUDED IN F/S BUT NOT INCLUDED ON FORM 990**

COST OF GOODS SOLD.....		\$	543,250.
	TOTAL	\$	<u>543,250.</u>

**SCHEDULE D, PART XII, LINE 4B****OTHER REVENUE INCLUDED ON FORM 990 BUT NOT INCLUDED IN F/S**

INVESTMENT INCOME.....		\$	186,277.
	TOTAL	\$	<u>186,277.</u>

**SCHEDULE D, PART XIII, LINE 2D****OTHER EXPENSES AND LOSSES PER AUDITED F/S**

COST OF GOODS SOLD.....		\$	543,250.
	TOTAL	\$	<u>543,250.</u>

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**Schedule F  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Statement of Activities Outside the United States**

- **Complete if the organization answered 'Yes' to Form 990, Part IV, line 14b, 15, or 16.**  
► **Attach to Form 990.** ► **See separate instructions.**

OMB No. 1545-0047

**2010**

**Open to Public  
Inspection**

Name of the organization

SAN DIEGO SOCIETY OF NATURAL HISTORY

Employer identification number

95-1643375

**Part I** **General Information on Activities Outside the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 14b.

- 1 For grantmakers.** 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 For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of grant funds outside the United States.
- 3 Activities per Region.** (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in region	(d) Activities conducted in region (by type) (e.g., fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for and investments in region
(1) MEXICO			PROGRAM SERVICE	RESEARCH & TRAINING	42,748.
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					
(8)					
(9)					
(10)					
(11)					
(12)					
(13)					
(14)					
(15)					
(16)					
(17)					
<b>3a</b> Sub-total.....					42,748.
<b>b</b> Total from continuation sheets to Part I.....					
<b>c</b> Totals (add lines 3a and 3b)...	0	0			42,748.

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

Schedule **F** (Form 990) 2010



**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Check this box if no one recipient received more than \$5,000. ☐ Part II can be duplicated if additional space is needed.

1	(a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)
(1)			NORTH AMERICA	RESEARCH	42,748.	WIRES & CHECKS			FMV
(2)									
(3)									
(4)									
(5)									
(6)									
(7)									
(8)									
(9)									
(10)									
(11)									
(12)									
(13)									
(14)									
(15)									
(16)									

- 2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter. ☐ 0
- 3 Enter total number of other organizations or entities ☐ 6

**Part III** **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 16. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)
(1)							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							
(13)							
(14)							
(15)							
(16)							
(17)							
(18)							

BAA

Schedule F (Form 990) 2010

**Part IV Foreign Forms**

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If 'Yes,' the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see instructions for Form 926).* ☐ Yes ☒ No
- 2 Did the organization have an interest in a foreign trust during the tax year? *If 'Yes,' the organization may be required to file Form 3520, Annual Return To Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A Annual Information Return of Foreign Trust With a U.S. Owner (see instructions for Forms 3520 and 3520-A).* ☐ Yes ☒ No
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If 'Yes,' the organization may be required to file Form 5471, Information Return of U.S. Persons with respect to Certain Foreign Corporations. (see instructions for Form 5471).* ☐ Yes ☒ No
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If 'Yes,' the organization may be required to file Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see instructions for Form 8621).* ☐ Yes ☒ No
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If 'Yes,' the organization may be required to file Form 8865, Return of U.S. Persons with respect to Certain Foreign Partnerships. (see instructions for Form 8865).* ☐ Yes ☒ No
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If 'Yes,' the organization may be required to file Form 5713, International Boycott Report (see instructions for Form 5713).* ☐ Yes ☒ No

BAA

TEEA3505L 10/27/10

Schedule F (Form 990) 2010

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**Part V Supplemental Information**

Complete this part to provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

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**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**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

**2010**

**Open to Public Inspection**

Name of the organization

SAN DIEGO SOCIETY OF NATURAL HISTORY

Employer identification number

95-1643375

**Part I Questions Regarding Compensation**

- 1 a** 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"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account            | <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.....

- 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?.....

- 3** Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input checked="" type="checkbox"/> Written employment contract                     |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <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 from the organization or a related organization?.....
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?.....
- c** Participate in, or receive payment from, an equity-based compensation arrangement?.....
- 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?.....
- b** Any related organization?.....
- 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?.....
- b** Any related organization?.....
- 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.....

- 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.....

- 9** If 'Yes' to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?.....

Yes No

<b>1 b</b>		
<b>2</b>		
<b>4 a</b>		X
<b>4 b</b>	X	
<b>4 c</b>		X
<b>5 a</b>		X
<b>5 b</b>		X
<b>6 a</b>		X
<b>6 b</b>		X
<b>7</b>		X
<b>8</b>		X
<b>9</b>		

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

Schedule J (Form 990) 2010

**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) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

(A) Name		(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 in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus and incentive compensation	(iii) Other reportable compensation				
MICHAEL HAGER	(i)	164,733.	0.	0.	0.	9,726.	174,459.	0.
1	(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)							



**Part III Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

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**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

**2010**

**Open to Public  
Inspection**

Name of the organization

SAN DIEGO SOCIETY OF NATURAL HISTORY

Employer identification number

95-1643375

**FORM 990, PART III, LINE 4D - OTHER PROGRAM SERVICES DESCRIPTION**

PUBLIC PROGRAMS: INFORMAL EDUCATION PROGRAMS SUCH AS CLASSES, LECTURES, FIELD  
TRIPS, AND EXPEDITIONS THAT PROMOTE LIFELONG LEARNING IN THE FIELD OF NATURAL  
SCIENCES.

**FORM 990, PART VI, LINE 6 - EXPLANATION OF CLASSES OF MEMBERS OR SHAREHOLDER**

MEMBERS MEET ANNUALLY TO VOTE ON ANY CHANGES TO BY-LAWS AND TO ELECT BOARD OFFICERS  
FOR THE COMING YEAR.

**FORM 990, PART VI, LINE 7A - HOW MEMBERS OR SHAREHOLDERS ELECT GOVERNING BODY**

SLATE OF PROPOSED BOARD OF DIRECTORS AND OFFICERS ARE VOTED ON BY MEMBERS VIA  
MAIL-IN BALLOT.

**FORM 990, PART VI, LINE 11B - FORM 990 REVIEW PROCESS**

SUBMITTED TO THE FINANCE COMMITTEE OF BOARD FOR REVIEW AND COMMENT, THEN FORWARDED  
TO THE FULL BOARD SUBSEQUENT TO THE REVIEW OF THE FINANCE COMMITTEE.

**FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS**

ALL BOARD DIRECTORS ARE REQUIRED TO ANNUALLY REVIEW, SIGN AND SUBMIT A COPY OF THE  
MUSEUM'S CONFLICT OF INTEREST POLICY AND DISCLOSE ANY CONFLICTS THEY MAY HAVE.

**FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS FOR CEO, EXEC. DIR., OR TOP MG**

THE COMPENSATION COMMITTEE OF THE BOARD OF DIRECTORS APPROVE THE COMPENSATION FOR  
THE EXECUTIVE DIRECTOR AND TOP MANAGEMENT, THROUGH THE USE OF INDEPENDENT  
COMPENSATION CONSULTANTS, SURVEYS, AND COMPARISON OF OTHER SIMILAR COMPANIES.

**FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE**

MADE AVAILABLE BOTH UPON REUEST AND ON THE MUSEUM'S PUBLIC WEBSITE.

2010

## SCHEDULE O - SUPPLEMENTAL INFORMATION

PAGE 2

CLIENT 06838

SAN DIEGO SOCIETY OF NATURAL HISTORY

95-1643375

5/15/12

02:08PM

## FORM 990, PART XI, LINE 5

## OTHER CHANGES IN NET ASSETS OR FUND BALANCES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS.....	\$ 2,001,650.
TOTAL	<u>\$ 2,001,650.</u>

PUBLIC DISCLOSURE COPY

2010

California Exempt Organization  
Annual Information Return

199

Calendar year 2010 or fiscal year beginning month 07 day 01 year 2010, and ending month 06 day 30 year 2011

<b>A</b> First Return Filed? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>B</b> Type of organization Exempt under Section 23701... <b>D</b> (insert letter) IRC Section 4947(a)(1) trust... <input type="checkbox"/>	<b>CORP #</b> C0008651
--	---	---------------------------

Corporation/Organization Name <b>SAN DIEGO SOCIETY OF NATURAL HISTORY</b>	<b>FEIN</b> 95-1643375
--	---------------------------

Address <b>PO BOX 121390</b>	City <b>SAN DIEGO, CA 92112</b>	State <b>CA</b>	ZIP Code <b>92112</b>
---------------------------------	------------------------------------	--------------------	--------------------------

<b>C</b> Amended Return? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>D</b> Are you a subordinate/affiliate in a group exemption? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>a</b> Is this a group filing for affiliates? See General Instruction L. <input type="checkbox"/> Yes <input type="checkbox"/> No <b>b</b> If 'Yes,' enter the number of affiliates. .... <b>c</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No (If 'No,' attach a list. See instructions.) <b>d</b> Is this a separate return filed by an organization covered by a group ruling? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>e</b> Federal Group Exemption Number. .... <b>f</b> Is a roster of subordinates attached? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>E</b> Final return? <input type="checkbox"/> Dissolved <input type="checkbox"/> Surrendered (Withdrawn) <input type="checkbox"/> Merged/Reorganized (attach explanation) If a box is checked, enter date. .... <b>F</b> Check the box if the organization filed the following federal forms or schedule: <b>1</b> <input checked="" type="checkbox"/> 990T <b>2</b> <input type="checkbox"/> 990PF <b>3</b> <input type="checkbox"/> (Schedule H) 990 <b>G</b> If organization is exempt under R&TC Section 23701d and is exclusively religious, educational, or charitable, and is supported primarily (50% or more) by public	contributions, check box. See General Instruction F. No filing fee is required. <input checked="" type="checkbox"/> X <b>H</b> Accounting method used <b>1</b> <input type="checkbox"/> Cash <b>2</b> <input checked="" type="checkbox"/> Accrual <b>3</b> <input type="checkbox"/> Other <b>I</b> If exempt under R&TC Section 23701d, has the organization during the year: (1) participated in any political campaign or (2) attempted to influence legislation or any ballot measure, or (3) made an election under R&TC Section 23704.5 (relating to lobbying by public charities)? If 'Yes,' complete and attach form FTB 3509, Political or Legislative Activities by Section 23701d Organizations. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>J</b> Did the organization have any changes in its activities, governing instrument, articles of incorporation, or bylaws that have not been reported to the Franchise Tax Board? If 'Yes,' complete an explanation and attach copies of revised documents. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>K</b> Is the organization exempt under R&TC Section 23701g? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' enter amount of gross receipts from nonmember sources. \$ ..... <b>L</b> Is the organization under audit by the IRS or has the IRS audited in a prior year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>M</b> Is the organization a Limited Liability Company? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>N</b> Did the organization file Form 100 or Form 109 to report taxable income? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--	--

**Part I Complete Part I unless not required to file this form. See General Instructions B and C.**

<b>Receipts and Revenues</b>	<b>1</b> Gross sales or receipts from other sources. From Side 2, Part II, line 8. ....	<b>1</b>	6,359,456.
	<b>2</b> Gross dues and assessments from members and affiliates. ....	<b>2</b>	416,020.
	<b>3</b> Gross contributions, gifts, grants, and similar amounts received. .... SEE. SCH. B	<b>3</b>	4,423,644.
	<b>4</b> Total gross receipts for filing requirement test. Add line 1 through line 3. This line must be completed. If the result is less than \$25,000, see General Instruction B. ....	<b>4</b>	11,199,120.
	<b>5</b> Cost of goods sold. ....	<b>5</b>	543,250.
<b>Expenses</b>	<b>6</b> Cost or other basis, and sales expenses of assets sold. ....	<b>6</b>	1,003,452.
	<b>7</b> Total costs. Add line 5 and line 6. ....	<b>7</b>	1,546,702.
	<b>8</b> Total gross income. Subtract line 7 from line 4. ....	<b>8</b>	9,652,418.
<b>Filing Fee</b>	<b>9</b> Total expenses and disbursements. From Side 2, Part II, line 18. ....	<b>9</b>	11,361,091.
	<b>10</b> Excess of receipts over expenses and disbursements. Subtract line 9 from line 8. ....	<b>10</b>	-1,708,673.
	<b>11</b> Filing fee \$10 or \$25. See General Instruction F. ....	<b>11</b>	
	<b>12</b> Total payments. ....	<b>12</b>	
	<b>13</b> Penalties and Interest. See General Instruction J. ....	<b>13</b>	
<b>Sign Here</b>	<b>14</b> Use tax. See General Instruction K. ....	<b>14</b>	
	<b>15</b> Balance due. Add line 11, line 13, and line 14. Then subtract line 12 from the result. ....	<b>15</b>	
	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.		
<b>Paid Preparer's Use Only</b>	Signature of officer <b>CHRISTOPHER M. ROBERTS</b>	Title <b>CFO/COO</b>	Date
	Firm's name (or yours, if self-employed) and address <b>WEST RHODE &amp; ROBERTS</b> <b>3104 FOURTH AVE</b> <b>SAN DIEGO, CA 92103</b>	Check if self-employed <input type="checkbox"/>	Telephone <b>619-232-3821</b>
			Preparer's PTIN/SSN <b>P00235008</b>
			FEIN <b>33-0783983</b>
			Telephone <b>619-615-5380</b>
May the FTB discuss this return with the preparer shown above? See instructions. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

**Part II Organizations with gross receipts of more than \$25,000 and private foundations regardless of amount of gross receipts – complete Part II or furnish substitute information. See Specific Line Instructions.**

<b>Receipts from Other Sources</b>	<b>1</b>	Gross sales or receipts from all business activities. See instructions. ....	•	<b>1</b>	399,555.
	<b>2</b>	Interest .....	•	<b>2</b>	
	<b>3</b>	Dividends .....	•	<b>3</b>	186,277.
	<b>4</b>	Gross rents .....	•	<b>4</b>	
	<b>5</b>	Gross royalties .....	•	<b>5</b>	
	<b>6</b>	Gross amount received from sale of assets (See Instructions) .....	•	<b>6</b>	1,015,151.
	<b>7</b>	Other income. Attach schedule. .... SEE STATEMENT 1	•	<b>7</b>	4,758,473.
	<b>8</b>	<b>Total</b> gross sales or receipts from other sources. Add line 1 through line 7. Enter here and on Side 1, Part I, line 1. ....		<b>8</b>	6,359,456.
<b>Expenses and Disbursements</b>	<b>9</b>	Contributions, gifts, grants, and similar amounts paid. Attach schedule .....	•	<b>9</b>	42,748.
	<b>10</b>	Disbursements to or for members. ....	•	<b>10</b>	
	<b>11</b>	Compensation of officers, directors, and trustees. Attach schedule .....	•	<b>11</b>	334,234.
	<b>12</b>	Other salaries and wages .....	•	<b>12</b>	3,210,249.
	<b>13</b>	Interest .....	•	<b>13</b>	616,955.
	<b>14</b>	Taxes .....	•	<b>14</b>	710,656.
	<b>15</b>	Rents .....	•	<b>15</b>	668,650.
	<b>16</b>	Depreciation and depletion (See Instructions) .....	•	<b>16</b>	1,591,154.
	<b>17</b>	Other. Attach schedule. .... SEE STATEMENT 2	•	<b>17</b>	4,186,445.
	<b>18</b>	<b>Total</b> expenses and disbursements. Add line 9 through line 17. Enter here and on Side 1, Part I, line 9. ....		<b>18</b>	11,361,091.

<b>Schedule L Balance Sheets</b>		<b>Beginning of taxable year</b>		<b>End of taxable year</b>	
		(a)	(b)	(c)	(d)
<b>Assets</b>					
<b>1</b>	Cash .....		793,902.	•	368,608.
<b>2</b>	Net accounts receivable .....		967,124.	•	1,015,669.
<b>3</b>	Net notes receivable. Attach schedule .....		365,527.	•	551,214.
<b>4</b>	Inventories .....		165,017.	•	48,695.
<b>5</b>	Federal and state government obligations .....			•	
<b>6</b>	Investments in other bonds. Attach sch. ....		8,727,851.	•	9,470,257.
<b>7</b>	Investments in stock. Attach schedule .....			•	
<b>8</b>	Mortgage loans (number of loans _____) .....			•	
<b>9</b>	Other investments. Attach schedule .....			•	
<b>10 a</b>	Depreciable assets. ....	42,338,034.		42,407,766.	
<b>b</b>	Less accumulated depreciation. ....	15,257,950.	27,080,084.	16,805,202.	25,602,564.
<b>11</b>	Land .....			•	
<b>12</b>	Other assets. Attach schedule. .... STM. 3		3,084,130.	•	3,484,055.
<b>13</b>	<b>Total assets.</b> .....		41,123,635.		40,541,062.
<b>Liabilities and net worth</b>					
<b>14</b>	Accounts payable .....		2,146,919.	•	2,051,254.
<b>15</b>	Contributions, gifts, or grants payable .....			•	
<b>16</b>	Bonds and notes payable. Attach schedule .....		13,181,886.	•	12,738,107.
<b>17</b>	Mortgages payable .....		345,215.	•	1,419,448.
<b>18</b>	Other liabilities. Attach schedule. .... STM. 4		1,466,145.		204,109.
<b>19</b>	Capital stock or principle fund .....		23,835,167.	•	24,128,144.
<b>20</b>	Paid-in or capital surplus. Attach reconciliation. ....			•	
<b>21</b>	Retained earnings or income fund .....			•	
<b>22</b>	<b>Total liabilities and net worth.</b> .....		40,975,332.		40,541,062.

**Schedule M-1 Reconciliation of income per books with income per return**

Do not complete this schedule if the amount on Schedule L, line 13, column (d), is less than \$25,000

<b>1</b>	Net income per books .....	•	-1,708,673.	<b>7</b>	Income recorded on books this year not included in this return. Attach schedule. ....	•	
<b>2</b>	Federal income tax .....	•		<b>8</b>	Deductions in this return not charged against book income this year. Attach schedule. ....	•	
<b>3</b>	Excess of capital losses over capital gains .....	•		<b>9</b>	<b>Total.</b> Add line 7 and line 8 .....		
<b>4</b>	Income not recorded on books this year. Attach schedule. ....	•		<b>10</b>	<b>Net income per return.</b> Subtract line 9 from line 6. ....		-1,708,673.
<b>5</b>	Expenses recorded on books this year not deducted in this return. Attach schedule .....	•					
<b>6</b>	<b>Total.</b> Add line 1 through line 5 .....		-1,708,673.				

CLIENT 06838

SAN DIEGO SOCIETY OF NATURAL HISTORY

95-1643375

5/15/12

02:08PM

**STATEMENT 1**  
**FORM 199, PART II, LINE 7**  
**OTHER INCOME**

FACILITY RENTAL.....	\$	203,995.
OTHER INCOME.....		138,348.
PROGRAM SERVICE REVENUE.....		4,416,130.
TOTAL	\$	<u>4,758,473.</u>

**STATEMENT 2**  
**FORM 199, PART II, LINE 17**  
**OTHER EXPENSES**

ADVERTISING AND PROMOTION.....	\$	381,071.
AUTO.....		26,771.
BANK FEES.....		690.
BUILDING MAINTENANCE.....		4,700.
COMPUTER.....		26,011.
CONTRACT MAINTENANCE.....		1,894.
EQUIPMENT.....		16,508.
EQUIPMENT MAINTENANCE.....		20,604.
EXHIBIT.....		80,763.
EXHIBIT MATERIALS.....		130,381.
FILM.....		189,591.
FOOD.....		22,774.
GUESS PASS REDEMPTION.....		193,186.
HOST EXPENSE.....		191,512.
INSURANCE.....		1,538,583.
MISCELLANEOUS.....		42,773.
OFFICE EXPENSES.....		35,056.
PAYROLL PROCESSING.....		16,065.
PENSION PLAN CONTRIBUTIONS.....		60,800.
PERMITS & FEES.....		21,666.
POSTAGE AND SHIPPING.....		35,652.
PRINTING AND PUBLICATIONS.....		88,133.
PROFESSIONAL FEES.....		511,512.
PROGRAM REFUNDS.....		899.
PUBLICATIONS.....		69,750.
REFERENCE BOOKS.....		1,038.
REGISTRATION & MEMBERSHIP FEES.....		36,035.
SCIENTIFIC SUPPLIES.....		82,910.
STAFF DEVELOPMENT.....		8,483.
SUBSCRIPTIONS.....		79,115.
TRAVEL.....		222,475.
UNIFORM.....		11,937.
UTILITIES.....		37,107.
TOTAL	\$	<u>4,186,445.</u>

**STATEMENT 3**  
**FORM 199, SCHEDULE L, LINE 12**  
**OTHER ASSETS**

BENEFICIAL INTEREST IN PERPETUAL TRUST.....		2,432,339.
COLLECTIONS AND EXHIBITS.....		1.
PREPAID EXPENSES AND DEFERRED CHARGES.....		1,051,715.
TOTAL	\$	<u>3,484,055.</u>

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CALIFORNIA STATEMENTS

PAGE 2

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STATEMENT 4  
FORM 199, SCHEDULE L, LINE 18  
OTHER LIABILITIES

DEFERRED REVENUE.....	57,549.
LINE OF CREDIT.....	146,560.
TOTAL	<u>\$ 204,109.</u>

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## STATEMENT 5

## FORM 199, PART II, LINE 11

## COMPENSATION OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION FROM ORG	COMPEN- SATION FROM RELATED ORG	ESTIMATED AMOUNT OF COMPEN- SATION
JEFF BLOCK	TRUSTEE 1.00	\$0	\$0	\$0
ANITA BUSQUETS	TRUSTEE 1.00	0	0	0
DARLENE DAVIES	TRUSTEE 1.00	0	0	0
WALT DAVIS	TRUSTEE 1.00	0	0	0
JOHN DOWNING	TRUSTEE 1.00	0	0	0
SUSAN EVANCO	TRUSTEE 1.00	0	0	0
RONNE FROMAN	TRUSTEE 1.00	0	0	0
ALLISON HENDERSON	TRUSTEE 1.00	0	0	0
MATT HOM M.D.	TRUSTEE 1.00	0	0	0
ALLEN M. JONES	TRUSTEE 1.00	0	0	0
STEVE A. KAY, PH. D	TRUSTEE 1.00	0	0	0
JEFFREY KENT	TRUSTEE 1.00	0	0	0
PETER KOVACS	TRUSTEE 1.00	0	0	0
STEVEN MCDONALD	TRUSTEE 1.00	0	0	0
TERRY MOORE	TRUSTEE 1.00	0	0	0
DENNIS MORGAN	TRUSTEE 1.00	0	0	0
JEROME NAVARRA	TRUSTEE 1.00	0	0	0
ROBERT PROULX	TRUSTEE 1.00	0	0	0



## STATEMENT 5 (CONTINUED)

## FORM 199, PART II, LINE 11

## COMPENSATION OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION FROM ORG	COMPEN- SATION FROM RELATED ORG	ESTIMATED AMOUNT OF COMPEN- SATION
YOLANDA WALTHER-MEADE	TRUSTEE 1.00	0	0	0
CAROL WILSON	TRUSTEE 1.00	0	0	0
JEFF WITT	TRUSTEE 1.00	0	0	0
PAUL DAYTON	TRUSTEE 1.00	0	0	0
ELLEN ZINN	TRUSTEE 1.00	0	0	0
TOM FLEMING	TRUSTEE 1.00	0	0	0
TOM HAZARD	TRUSTEE 1.00	0	0	0
PAM PALISOUL	TRUSTEE 1.00	0	0	0
BRYCE RHODES	TRUSTEE 1.00	0	0	0
MARY YANG	TRUSTEE 1.00	0	0	0
ROBERT ARMSTRONG	TREASURER 1.00	0	0	0
STEPHEN COHEN	CHAIRMAN 1.00	0	0	0
VIRGINIA CROCKETT	VICE CHAIR 1.00	0	0	0
JOHN SCHMID	SECRETARY 1.00	0	0	0
MICHAEL W. HAGER	PRESIDENT & CEO 40.00	172,550	0	9,734
SUSAN LOVEALL	CFO/COO 40.00	13,385	0	0
GEORGE BROOKS - GONYER	OLD CFO/COO 40.00	134,568	0	3,997
	TOTAL	320,503	0	13,731