HARRY S. TRUMAN LIBRARY INSTITUTE

Form 990 Public Disclosure Copy

For The Year Ended September 30, 2013

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Form **990**

Department of the Treasury
Internal Revenue Service

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)

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

OMB No. 1545-0047

2012

Open to Public Inspection

A For the 2012 calendar year, or tax year beginning OCT 1, 2012 and ending SEP 30, 2013

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

C Name of organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

Doing Business As

Number and street (or P.O. box if mail is not delivered to street address): 500 WEST US HIGHWAY 24 — Room/suite

City, town, or post office, state, and ZIP code: INDEPENDENCE, MO 64050-1798

D Employer identification number: 43-6042632

E Telephone number: 816-268-8248

G Gross receipts $ 7,597,477.

F Name and address of principal officer: MARY HUNKELER
SAME AS C ABOVE

H(a) Is this a group return for affiliates? [ ] Yes [X] No

H(b) Are all affiliates included? [ ] Yes [ ] No
If "No," attach a list. (see instructions)

H(c) Group exemption number ▶

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

J Website: ▶ WWW.TRUMANLIBRARY.ORG

K Form of organization: [X] Corporation [ ] Trust [ ] Association [ ] Other ▶

L Year of formation: 1957 **M** State of legal domicile: MO

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities: TO PRESERVE AND PROMOTE THE ENDURING LEGACY OF HARRY S. TRUMAN, AMERICA'S 33RD PRESIDENT.

2 Check this box ▶ [ ] if the organization discontinued its operations or disposed of more than 25% of its net assets.

3	Number of voting members of the governing body (Part VI, line 1a)	3	30
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	29
5	Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	14
6	Total number of volunteers (estimate if necessary)	6	28
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0.

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	863,577.	965,102.
	9	Program service revenue (Part VIII, line 2g)	68,487.	67,215.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	496,882.	494,386.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	-33,088.	-27,016.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,395,858.	1,499,687.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	162,879.	140,539.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	613,398.	725,979.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 264,491.		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	630,288.	648,991.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	1,406,565.	1,515,509.
	19	Revenue less expenses. Subtract line 18 from line 12	-10,707.	-15,822.
			Beginning of Current Year	**End of Year**
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	10,047,451.	10,787,083.
	21	Total liabilities (Part X, line 26)	0.	0.
	22	Net assets or fund balances. Subtract line 21 from line 20	10,047,451.	10,787,083.

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

▶ ROGER NOVAK, TREASURER
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
JAMES R. RITTS				P00362910

Firm's name ▶ RUBINBROWN LLP — Firm's EIN ▶ 43-0765316

Firm's address ▶ 10975 GRANDVIEW, SUITE 600
OVERLAND PARK, KS 66210 — Phone no. 913-491-4144

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

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

SEE SCHEDULE O

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

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

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

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

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

4a (Code:) (Expenses $ 460,644. including grants of $ 140,539.) (Revenue $ 71,875.)

SEE SCHEDULE O

4b (Code:) (Expenses $ 172,362. including grants of $) (Revenue $ 256.)

SEE SCHEDULE O

4c (Code:) (Expenses $ 36,425. including grants of $) (Revenue $)

SEE SCHEDULE O

4d Other program services (Describe in Schedule O.)

(Expenses $ 340,950. including grants of $) (Revenue $ 3,008.)

4e Total program service expenses ▶ 1,010,381.

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232002
12-10-12

SEE SCHEDULE O FOR CONTINUATION(S)

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*	1	X	
2	Is the organization required to complete *Schedule B, Schedule of Contributors*?	2	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*	3		X
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		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*	5		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		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*	7		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		X
9	Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		X
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10	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*	11a		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*	11b		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*	11c		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*	11d		X
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e		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*	11f		X
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	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 and XII is optional*	12b		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		X
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		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*	15		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*	16	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*	17		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*	18	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*	19		X
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		X
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		

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

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	30			
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	X	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	14			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?			2b	X	
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to *e-file* (see instructions)					
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			3a		X
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O*			3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			4a		X
b	If "Yes," enter the name of the foreign country: ▶					
	See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			5a		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b		X
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			5c		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?			6a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			7a	X	
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b	X	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c		X
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			7f		X
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			7h		
8	**Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.** Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?			8		
9	**Sponsoring organizations maintaining donor advised funds.**					
a	Did the organization make any taxable distributions under section 4966?			9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?			9b		
10	**Section 501(c)(7) organizations.** Enter:					
a	Initiation fees and capital contributions included on Part VIII, line 12	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b				
11	**Section 501(c)(12) organizations.** Enter:					
a	Gross income from members or shareholders	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state?			13a		
	Note. See the instructions for additional information the organization must report on Schedule O.					
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b				
c	Enter the amount of reserves on hand	13c				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			14a		X
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*			14b		

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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
1a	Enter the number of voting members of the governing body at the end of the tax year 1a: 30			
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.			
b	Enter the number of voting members included in line 1a, above, who are independent 1b: 29			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?	3		X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4		X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		X
6	Did the organization have members or stockholders?	6		X
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a		X
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	7b		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a	The governing body?	8a	X	
b	Each committee with authority to act on behalf of the governing body?	8b	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*	9		X

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

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

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶ NONE

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

[ ] Own website [ ] Another's website [X] Upon request [ ] Other *(explain in Schedule O)*

19 Describe in Schedule O whether (and if so, how), the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

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

LISA SULLIVAN - 816-268-8248

500 W US HWY 24, INDEPENDENCE, MO 64050

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

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

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

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

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

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(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
(1) CAROL ANDERSON DIRECTOR	1.00	X						0.	0.	0.
(2) ALAN L ATTERBURY DIRECTOR	1.00	X						0.	0.	0.
(3) MORGAN A BURDEN EXECUTIVE DIRECTOR/EX OFFI	40.00	X		X				125,251.	0.	24,406.
(4) KIRK W CARPENTER DIRECTOR	1.00	X						0.	0.	0.
(5) CLIFTON TRUMAN DANIEL HONORARY CHAIR	1.00	X						0.	0.	0.
(6) MICHAEL J DEVINE EX OFFICIO DIRECTOR	1.00	X						0.	0.	0.
(7) JOHN A DILLINGHAM DIRECTOR	1.00	X						0.	0.	0.
(8) ROBERT P DUNN DIRECTOR	1.00	X						0.	0.	0.
(9) CHARLES M FOUDREE DIRECTOR	1.00	X						0.	0.	0.
(10) MARY ANN HEISS DIRECTOR	1.00	X						0.	0.	0.
(11) MARY HUNKELER CHAIRMAN/DIRECTOR	1.00	X		X				0.	0.	0.
(12) HERBERT M KOHN SECRETARY/DIRECTOR	1.00	X		X				0.	0.	0.
(13) ALLEN L LEFKO DIRECTOR	1.00	X						0.	0.	0.
(14) JOHN A MACDONALD DIRECTOR	1.00	X						0.	0.	0.
(15) THOMAS R MCGEE JR. DIRECTOR	1.00	X						0.	0.	0.
(16) JOHN P MCMEEL DIRECTOR	1.00	X						0.	0.	0.
(17) LARRY L MCMULLEN DIRECTOR	1.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position: Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(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
(18) ROGER A NOVAK TREASURER/DIRECTOR	1.00	X		X				0.	0.	0.
(19) JAMES B NUTTER JR DIRECTOR	1.00	X						0.	0.	0.
(20) CAPPY P POWELL DIRECTOR	1.00	X						0.	0.	0.
(21) PAGE BRANTON REED DIRECTOR	1.00	X						0.	0.	0.
(22) JOHN J SHERMAN VICE CHAIR/DIRECTOR	1.00	X		X				0.	0.	0.
(23) IKE SKELTON DIRECTOR	1.00	X						0.	0.	0.
(24) ELIZABETH T SOLBERG DIRECTOR	1.00	X						0.	0.	0.
(25) CHARLES S SOSLAND DIRECTOR	1.00	X						0.	0.	0.
(26) JEANNIE STRANDJORD DIRECTOR	1.00	X						0.	0.	0.
1b Sub-total ▶								125,251.	0.	24,406.
c Total from continuation sheets to Part VII, Section A ▶								71,935.	0.	13,279.
d Total (add lines 1b and 1c) ▶								197,186.	0.	37,685.

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 1

			Yes	No
3	Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	3		X
4	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? *If "Yes," complete Schedule J for such individual*	4		X
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	5		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. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

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

SEE PART VII, SECTION A CONTINUATION SHEETS

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former	(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
(27) MAURICE A WATSON DIRECTOR	1.00	X						0.	0.	0.
(28) SUSIE S. EVANS DIRECTOR	1.00	X						0.	0.	0.
(29) CLYDE F. WENDEL DIRECTOR	1.00	X						0.	0.	0.
(30) DAVID WILLIAMS DIRECTOR	1.00	X						0.	0.	0.
(31) LISA SULLIVAN DIRECTOR OF FINANCE	40.00			X				71,935.	0.	13,279.
Total to Part VII, Section A, line 1c								71,935.		13,279.

Part VIII Statement of Revenue

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

					(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a					
	b	Membership dues	1b	257,629.				
	c	Fundraising events	1c	276,642.				
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	430,831.				
	g	Noncash contributions included in lines 1a-1f: $ 10,998.						
	h	**Total.** Add lines 1a-1f			965,102.			
Program Service Revenue			Business Code					
	2 a	WHITE HOUSE DECISION CENTER REVEN	900099		67,215.	67,215.		
	b							
	c							
	d							
	e							
	f	All other program service revenue						
	g	**Total.** Add lines 2a-2f			67,215.			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)			212,494.			212,494.
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
			(i) Real	(ii) Personal				
	6 a	Gross rents						
	b	Less: rental expenses						
	c	Rental income or (loss)						
	d	Net rental income or (loss)						
			(i) Securities	(ii) Other				
	7 a	Gross amount from sales of assets other than inventory	6,303,018.					
	b	Less: cost or other basis and sales expenses	6,021,126.					
	c	Gain or (loss)	281,892.					
	d	Net gain or (loss)			281,892.			281,892.
	8 a	Gross income from fundraising events (not including $ 276,642. of contributions reported on line 1c). See Part IV, line 18	a	41,724.				
	b	Less: direct expenses	b	76,664.				
	c	Net income or (loss) from fundraising events			-34,940.			-34,940.
	9 a	Gross income from gaming activities. See Part IV, line 19	a					
	b	Less: direct expenses	b					
	c	Net income or (loss) from gaming activities						
	10 a	Gross sales of inventory, less returns and allowances	a					
	b	Less: cost of goods sold	b					
	c	Net income or (loss) from sales of inventory						
		Miscellaneous Revenue	Business Code					
	11 a	MISCELLANEOUS INCOME	900099		7,924.	7,924.		
	b							
	c							
	d	All other revenue						
	e	**Total.** Add lines 11a-11d			7,924.			
	12	**Total revenue.** See instructions.			1,499,687.	75,139.	0.	459,446.

Part IX | Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the United States. See Part IV, line 21				
2 Grants and other assistance to individuals in the United States. See Part IV, line 22	133,676.	133,676.		
3 Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16	6,863.	6,863.		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	258,507.	69,770.	115,384.	73,353.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	348,372.	268,957.	2,431.	76,984.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	23,984.	17,974.	197.	5,813.
9 Other employee benefits	52,998.	30,183.	564.	22,251.
10 Payroll taxes	42,118.	18,449.	5,616.	18,053.
11 Fees for services (non-employees):				
a Management				
b Legal	11,053.		11,053.	
c Accounting	22,700.		22,700.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	37,831.		37,831.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	9,161.		9,161.	
12 Advertising and promotion	66,143.	66,143.		
13 Office expenses	19,639.		19,639.	
14 Information technology	57,757.	57,757.		
15 Royalties				
16 Occupancy				
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	7,896.		7,896.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance	7,856.		7,856.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a PUBLIC PROGRAMS	172,362.	172,362.		
b FUNDRAISING OTHER DIREC	42,747.			42,747.
c EDUCATION	38,159.	38,159.		
d EXHIBITS	36,425.	36,425.		
e All other expenses	119,262.	93,663.	309.	25,290.
25 **Total functional expenses.** Add lines 1 through 24e	1,515,509.	1,010,381.	240,637.	264,491.
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

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

				(A) Beginning of year		(B) End of year
Assets	1	Cash - non-interest-bearing			1	
	2	Savings and temporary cash investments		514,807.	2	800,077.
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net			4	
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges			9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a			
	b	Less: accumulated depreciation	10b		10c	
	11	Investments - publicly traded securities		9,532,644.	11	9,987,006.
	12	Investments - other securities. See Part IV, line 11			12	
	13	Investments - program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11			15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)		10,047,451.	16	10,787,083.
Liabilities	17	Accounts payable and accrued expenses			17	
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D			25	
	26	**Total liabilities.** Add lines 17 through 25		0.	26	0.
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ [X] and complete lines 27 through 29, and lines 33 and 34.**				
	27	Unrestricted net assets		4,785,290.	27	5,242,462.
	28	Temporarily restricted net assets		1,809,013.	28	2,041,473.
	29	Permanently restricted net assets		3,453,148.	29	3,503,148.
		Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds			30	
	31	Paid-in or capital surplus, or land, building, or equipment fund			31	
	32	Retained earnings, endowment, accumulated income, or other funds			32	
	33	Total net assets or fund balances		10,047,451.	33	10,787,083.
	34	Total liabilities and net assets/fund balances		10,047,451.	34	10,787,083.

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	1,499,687.
2	Total expenses (must equal Part IX, column (A), line 25)	2	1,515,509.
3	Revenue less expenses. Subtract line 2 from line 1	3	-15,822.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	10,047,451.
5	Net unrealized gains (losses) on investments	5	755,454.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	10,787,083.

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: ☐ Cash ☐ Accrual ☒ Other MODIFIED CASH 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?	2a		X
	If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	X	
	If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	X	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		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	3b		

Form 990 (2012)

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
2012
Open to Public Inspection

Name of the organization THE HARRY S. TRUMAN LIBRARY INSTITUTE
Employer identification number 43-6042632

Part I **Reason for Public Charity Status** (All organizations must complete this part.) See instructions.

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

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: __________
5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
9 ☐ An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.

a ☐ Type I **b** ☐ Type II **c** ☐ Type III - Functionally integrated **d** ☐ Type III - Non-functionally integrated

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(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?	**11g(i)**		
(ii) A family member of a person described in (i) above?	**11g(ii)**		
(iii) A 35% controlled entity of a person described in (i) or (ii) above?	**11g(iii)**		

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

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

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

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	1887960.	824,416.	1966647.	863,577.	965,102.	6507702.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3	1887960.	824,416.	1966647.	863,577.	965,102.	6507702.
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)						1582735.
6 **Public support.** Subtract line 5 from line 4.						4924967.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
7 Amounts from line 4	1887960.	824,416.	1966647.	863,577.	965,102.	6507702.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	154,536.	172,578.	213,585.	222,190.	212,494.	975,383.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	39,950.	31,263.	66,400.	67,886.	49,648.	255,147.
11 **Total support.** Add lines 7 through 10						7738232.

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** .... ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f)) .... 14 | 63.64 %

15 Public support percentage from 2011 Schedule A, Part II, line 14 .... 15 | 62.97 %

16a **33 1/3% support test - 2012.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization .... ▶ [X]

b **33 1/3% support test - 2011.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization .... ▶ ☐

17a **10% -facts-and-circumstances test - 2012.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .... ▶ ☐

b **10% -facts-and-circumstances test - 2011.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .... ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .... ▶ ☐

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

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

Section A. Public Support

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

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 **Total support.** (Add lines 9, 10c, 11, and 12.)						

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

Section C. Computation of Public Support Percentage

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

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2012** (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from **2011** Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2012.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support tests - 2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

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

Schedule B (Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

OMB No. 1545-0047

2012

Name of the organization

THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number

43-6042632

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	[X] 501(c)(3) (enter number) organization
	[ ] 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	[ ] 527 political organization
Form 990-PF	[ ] 501(c)(3) exempt private foundation
	[ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation
	[ ] 501(c)(3) taxable private foundation

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

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

General Rule

[ ] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

[X] For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

[ ] For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

[ ] For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year .... ▶ $ ____________

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

Name of organization	Employer identification number
THE HARRY S. TRUMAN LIBRARY INSTITUTE	43-6042632

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		$ 27,290.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
2		$ 63,205.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
3		$ 65,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
4		$ 20,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
5		$ 75,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
6		$ 50,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization	Employer identification number
THE HARRY S. TRUMAN LIBRARY INSTITUTE	43-6042632

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7		$ 50,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
8		$ 49,260.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
9		$ 36,468.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
10		$ 25,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
11		$ 21,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
12		$ 20,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Name of organization	Employer identification number
THE HARRY S. TRUMAN LIBRARY INSTITUTE	43-6042632

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

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

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

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

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

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

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

Name of organization

THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number

43-6042632

Part III *Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once.) ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

OMB No. 1545-0047
2012
Open to Public Inspection

Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number: 43-6042632

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? ☐ Yes ☐ 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? ☐ Yes ☐ No

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).
- ☐ Preservation of land for public use (e.g., recreation or education)
- ☐ Protection of natural habitat
- ☐ Preservation of open space
- ☐ Preservation of an historically important land area
- ☐ Preservation of a certified historic structure

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

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

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

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

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

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

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

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

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

Part III **Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	6,094,477.	5,347,124.	5,276,067.	4,877,322.	4,520,581.
b Contributions	52,700.	7,526.	200,848.		276,254.
c Net investment earnings, gains, and losses	795,733.	865,586.	-108,655.	478,681.	171,169.
d Grants or scholarships					
e Other expenditures for facilities and programs	190,994.	104,341.		60,910.	75,981.
f Administrative expenses	23,239.	21,418.	21,136.	19,026.	14,701.
g End of year balance	6,728,677.	6,094,477.	5,347,124.	5,276,067.	4,877,322.

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

a Board designated or quasi-endowment ▶ 22.19 %

b Permanent endowment ▶ 52.06 %

c Temporarily restricted endowment ▶ 25.74 %

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

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

		Yes	No
(i) unrelated organizations	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 XIII the intended uses of the organization's endowment funds.

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* ▶				0.

Schedule D (Form 990) 2012

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12-10-12

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

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

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

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

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

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

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
(11)	
Total. *(Column (b) must equal Form 990, Part X, col. (B) line 25.)* ▶	

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

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements			1	2,255,141.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains on investments	2a	755,454.		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	755,454.
3	Subtract line **2e** from line **1**			3	1,499,687.
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0.
5	Total revenue. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 12.)*			5	1,499,687.

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements			1	1,515,509.
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 XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0.
3	Subtract line **2e** from line **1**			3	1,515,509.
4	Amounts included on Form 990, Part IX, line 25, but not on line **1**:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0.
5	Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)*			5	1,515,509.

Part XIII 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, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

PART V, LINE 4: THE INTENDED PURPOSE OF THE ENDOWMENT IS TO CONTINUE TO PROVIDE CONTINUOUS SUPPORT TO THE INSTITUTE AND PROMOTE THE LEGACY OF HARRY S. TRUMAN.

THE INSTITUTE HAS ADOPTED INVESTMENT AND SPENDING POLICIES FOR ENDOWMENT ASSETS THAT ATTEMPT TO PRESERVE AND ENHANCE THE PURCHASING POWER OF THE ENDOWMENT. ENDOWMENT ASSETS INCLUDE THOSE ASSETS OF DONOR-RESTRICTED ENDOWMENT FUNDS THE INSTITUTE MUST HOLD IN PERPETUITY OR FOR

Part XIII Supplemental Information *(continued)*

DONOR-SPECIFIED PERIODS, AS WELL AS THOSE OF BOARD DESIGNATED ENDOWMENT FUNDS. UNDER THE INSTITUTE'S POLICIES, ENDOWMENT ASSETS ARE INVESTED IN A MANNER THAT IS INTENDED TO PRODUCE A MODERATE RETURN WHILE ASSUMING A MINIMAL LEVEL OF INVESTMENT RISK.

THE INSTITUTE HAS A POLICY (THE SPENDING POLICY) OF APPROPRIATING FOR EXPENDITURE EACH YEAR THE REALIZED EARNINGS AND INTEREST INCOME FOR THE BOARD DESIGNATED ENDOWMENTS. THE POLICY ALLOWS UP TO 5% OF BOARD DESIGNATED ENDOWMENT NET ASSETS TO BE EXPENDED ON AN ANNUAL BASIS. THE INVESTMENT INCOME FROM THE BOARD DESIGNATED ENDOWMENT IS UNRESTRICTED AND MAY BE FULLY EXPENDED AS NEEDED WITH PRIOR APPROVAL BY THE BOARD. DONOR-RESTRICTED ENDOWMENTS ARE EXPENDED IN ACCORDANCE WITH THE DONOR AGREEMENTS.

KEMPTON ENDOWMENT:

PER THE TERMS OF GRETA KEMPTON'S 1991 WILL, 25% OF HER ESTATE GIFT WAS USED BY THE INSTITUTE FOR ITS GENERAL PURPOSES. THE REMAINING 75% CORPUS IS HELD IN A PERMANENTLY RESTRICTED ENDOWMENT FUND WITH THE INCOME THERE FROM TO BE USED BY THE INSTITUTE FOR ITS GENERAL PURPOSES. THE UNRESTRICTED INVESTMENT INCOME CAN BE EXPENDED DURING THE FISCAL YEAR FOR PURPOSES DEEMED APPROPRIATE AND NECESSARY BY THE INSTITUTE'S BUDGET, FINANCE AND INVESTMENT COMMITTEE.

JOHNSTON ENDOWMENT: TERMS STATE THAT THE CORPUS IS PERMANENTLY RESTRICTED. INVESTMENT INCOME IS TEMPORARILY RESTRICTED TO SUBSIDIZE EXPENSES ASSOCIATED WITH THE ANNUAL "HOWARD AND VIRGINIA BENNETT FORUM ON THE PRESIDENCY." ADDITIONALLY, INVESTMENT INCOME CAN BE EXPENDED TO SUPPORT AN ANNUAL ARCHIVAL RESEARCH INTERNSHIP.

Part XIII **Supplemental Information** *(continued)*

THE BOARD DESIGNATED ENDOWMENT FUND, WHICH RESULTS FROM AN INTERNAL DESIGNATION, IS NOT DONOR-RESTRICTED AND IS CLASSIFIED AS UNRESTRICTED NET ASSETS. THESE ASSETS MAY BE EARMARKED FOR FUTURE PROGRAMS, PURCHASE OR CONSTRUCTION OF FIXED ASSETS, CONTINGENCIES OR OTHER USES AS DETERMINED BY THE INSTITUTE'S EXECUTIVE COMMITTEE OR BOARD OF DIRECTORS WITH PRIOR RECOMMENDATION FROM THE BUDGET, FINANCE AND INVESTMENT COMMITTEE. INVESTMENT INCOME FROM THIS FUND IS ALSO UNRESTRICTED AND MAY BE FULLY EXPENDED AS NEEDED WITH PRIOR APPROVAL BY THE BUDGET, FINANCE AND INVESTMENT COMMITTEE. SPECIAL EXCEPTIONS TO THIS POLICY TO ALLOW FURTHER REDUCTION OF THE PRINCIPAL WILL BE APPROVED BY A FORMAL VOTE OF THE INSTITUTE'S BOARD OF DIRECTORS.

HULSTON FAMILY ENDOWMENT: IN FY13, THE HULSTON FAMILY FOUNDATION DONATED $50,000 TO THE INSTITUTE FOR THE PURPOSE OF ESTABLISHING A PERMANENTLY RESTRICTED ENDOWMENT FUND. THE TERMS AND CONDITIONS ESTABLISHED WITH THE DONOR STIPULATE THAT THE INITIAL $50,000 GIFT WILL BE PRESERVED IN PERPETUITY WHILE THE INVESTMENT INCOME WILL BE USED TO FUND A SPECIAL $2,500 JOHN K. HULSTON RESEARCH GRANT ON AN ANNUAL BASIS. WHEN NECESSARY, THE INSTITUTE AGREES TO SUPPLEMENT THE INVESTMENT PROCEEDS FROM THE HULSTON ENDOWMENT FUND WITH GENERAL UNRESTRICTED FUNDS TO ENSURE THAT THIS GRANT IS AVAILABLE EACH YEAR.

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

2012

Open to Public Inspection

Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number: 43-6042632

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 its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ...... [X] Yes [ ] No

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance 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
3 a Sub-total	0	0			0.
b Total from continuation sheets to Part I	0	0			0.
c Totals (add lines 3a and 3b)	0	0			0.

LHA **For Paperwork Reduction Act Notice, see the Instructions for Form 990.** **Schedule F (Form 990) 2012**

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5370212 132842 20149-00 2012.05030 THE HARRY S. TRUMAN LIBRARY 20149-01

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. 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)

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 ▶

3 Enter total number of other organizations or entities ▶

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)
RESEARCH	EUROPE (INCLUDING ICELAND & GREENLAND) -	2	4,422.	CHECK	0.		
RESEARCH	NORTH AMERICA - CANADA AND MEXICO, BUT	1	2,441.	CHECK	0.		

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, Information 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

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; amounts of investments vs. expenditures per region); 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.

SCHEDULE F, PART I, LINE 2: AS PART OF OUR MISSION, TRUMAN LIBRARY INSTITUTE GRANTS & AWARDS ARE GIVEN FOR THE PURPOSE OF SUPPORTING SCHOLARSHIP BASED ON SOME ASPECT OF THE LIFE AND CAREER OF HARRY S. TRUMAN OR OF THE PUBLIC AND FOREIGN POLICY ISSUES WHICH WERE PROMINENT DURING THE TRUMAN ADMINISTRATION.

SELECTION IS MADE BY THE INSTITUTE'S COMMITTEE ON RESEARCH, SCHOLARSHIP AND EDUCATION. FUNDING DECISIONS, VIA AN APPLICATION PROCESS, ARE BASED ON QUALITY, ORIGINALITY, SIGNIFICANCE OF THE PROJECT AND ITS RELATIONSHIP TO THE EXISTING TRUMAN HISTORIOGRAPHY, AND TWO LETTERS OF REFERENCE. RESEARCH GRANTS REQUIRE TRAVEL TO THE TRUMAN LIBRARY FOR STUDY OF ITS ARCHIVAL COLLECTIONS. ONE-TIME PAYMENTS ARE DISPERSED DIRECTLY AND PAYABLE TO THE AWARDEES UPON COMPLETION OF THE RESEARCH TRIP AND DO NOT REQUIRE ANY FURTHER MONITORING.

DECISIONS REGARDING SELECTION OF DISSERTATION YEAR FELLOWSHIP AND SCHOLAR'S AWARD WINNERS ARE MADE VIA A SIMILAR APPLICATION PROCESS. THESE AWARDS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEES IN TWO INSTALLMENTS. AWARDEES ARE REQUIRED TO SUBMIT A PROGRESS REPORT ON THE WORK DONE NO LATER THAN SIX MONTHS FROM ISSUANCE OF THE SECOND INSTALLMENT. THESE AWARDEES AGREE TO THE STIPULATION TO PROVIDE THE TRUMAN LIBRARY WITH COPIES OF ANY PUBLICATION RESULTING FROM RESEARCH SUPPORTED BY ONE OF ITS GRANTS OR AWARDS.

THE HARRY S. TRUMAN BOOK AWARD IS GIVEN IN RECOGNITION OF THE BEST BOOK PUBLISHED WITHIN A TWO-YEAR PERIOD THAT DEALS PRIMARILY AND SUBSTANTIALLY WITH THE LIFE AND CAREER OF HARRY S. TRUMAN OR OF THE PUBLIC AND FOREIGN

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; amounts of investments vs. expenditures per region); 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.

POLICY ISSUES WHICH WERE PROMINENT DURING THE TRUMAN ADMINISTRATION.
PUBLISHERS ARE REQUIRED TO SUBMIT SIX COPIES OF AN APPROPRIATE ENTRY TO THE COMMITTEE ON RESEARCH, SCHOLARSHIP AND EDUCATION FOR EVALUATION AND AWARD SELECTION. AWARDS ARE GIVEN IN EVEN-NUMBERED YEARS.
ONE-TIME PAYMENTS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEES AND REQUIRE NO FURTHER MONITORING.

SCHEDULE G (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No. 1545-0047

2012

Open To Public Inspection

Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number 43-6042632

Part I **Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☐ Mail solicitations
- b ☐ Internet and email solicitations
- c ☐ Phone solicitations
- d ☐ In-person solicitations
- e ☐ Solicitation of non-government grants
- f ☐ Solicitation of government grants
- g ☐ Special fundraising events

2 a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☐ No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
Total ▶						

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II **Fundraising Events.** Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1 WILD ABOUT HARRY (event type)	(b) Event #2 (event type)	(c) Other events NONE (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts	318,366.			318,366.
	2 Less: Contributions	276,642.			276,642.
	3 Gross income (line 1 minus line 2)	41,724.			41,724.
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages	40,391.			40,391.
	8 Entertainment				
	9 Other direct expenses	36,273.			36,273.
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				(76,664.)
	11 Net income summary. Combine line 3, column (d), and line 10 ▶				-34,940.

Part III **Gaming.** Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than $15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	☐ Yes ____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				( )
	8 Net gaming income summary. Combine line 1, column d, and line 7 ▶				

9 Enter the state(s) in which the organization operates gaming activities: ____

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: ____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: ____

11 Does the organization operate gaming activities with nonmembers? ☐ Yes ☐ No

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No

13 Indicate the percentage of gaming activity operated in:

a The organization's facility 13a %

b An outside facility 13b %

14 Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ ______ and the amount of gaming revenue retained by the third party ▶ $ ______ .

c If "Yes," enter name and address of the third party:

Name ▶

Address ▶

16 Gaming manager information:

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

b Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part I, line 2b, columns (iii) and (v), and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also complete this part to provide any additional information (see instructions).

SCHEDULE I
(Form 990)

Department of the Treasury
Internal Revenue Service

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

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

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Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

Employer identification number 43-6042632

Part I **General Information on Grants and Assistance**

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance

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

3 Enter total number of other organizations listed in the line 1 table ▶

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

Part III **Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
RESEARCH GRANT	23	24,676.	0.		
TRUMAN-KAUFFMAN SCHOLARS FELLOWSHIP	2	70,000.	0.		
DISSERTATION YEAR FELLOWSHIP	3	24,000.	0.		
SCHOLAR'S AWARD	1	15,000.	0.		

Part IV **Supplemental Information.** Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

SCHEDULE I, PART I, LINE 2: AS PART OF OUR MISSION, TRUMAN LIBRARY INSTITUTE GRANTS & AWARDS ARE GIVEN FOR THE PURPOSE OF SUPPORTING SCHOLARSHIP BASED ON SOME ASPECT OF THE LIFE AND CAREER OF HARRY S. TRUMAN OR OF THE PUBLIC AND FOREIGN POLICY ISSUES WHICH WERE PROMINENT DURING THE TRUMAN ADMINISTRATION. SELECTION IS MADE BY THE INSTITUTE'S COMMITTEE ON RESEARCH, SCHOLARSHIP AND EDUCATION. FUNDING DECISIONS, VIA AN APPLICATION PROCESS, ARE BASED ON QUALITY, ORIGINALITY, SIGNIFICANCE OF THE PROJECT AND ITS RELATIONSHIP TO THE EXISTING TRUMAN HISTORIOGRAPHY, AND TWO LETTERS OF REFERENCE. RESEARCH GRANTS REQUIRE TRAVEL TO THE TRUMAN LIBRARY FOR STUDY

Part IV **Supplemental Information**

OF ITS ARCHIVAL COLLECTIONS. ONE-TIME PAYMENTS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEE UPON COMPLETION OF THE RESEARCH TRIP AND DO NOT REQUIRE ANY FURTHER MONITORING.

DECISIONS REGARDING SELECTION OF DISSERTATION YEAR FELLOWSHIP AND SCHOLAR'S AWARD WINNERS ARE MADE VIA A SIMILAR APPLICATION PROCESS. THESE AWARDS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEE IN TWO INSTALLMENTS. AWARDEES ARE REQUIRED TO SUBMIT A PROGRESS REPORT ON THE WORK DONE NO LATER THAN SIX MONTHS FROM ISSUANCE OF THE SECOND INSTALLMENT. AWARDEES AGREE TO THE STIPULATION TO PROVIDE THE TRUMAN LIBRARY WITH COPIES OF ANY PUBLICATION RESULTING FROM RESEARCH SUPPORTED BY ONE OF ITS GRANTS OR AWARDS.

TRUMAN-KAUFFMAN SCHOLAR FELLOWSHIPS - THIS PROGRAM OFFERS A MAJOR NON-RESIDENT FELLOWSHIP TO SENIOR SCHOLARS WHO ARE SPECIFICALLY WORKING ON AREAS OF ECONOMIC DEVELOPMENT AND MODERNIZATION PARTICULARLY IN THE WAKE OF WAR, COLONIALISM AND NATURAL DISASTERS USING PRESIDENT TRUMAN'S MARSHALL PLAN AND POINT FOUR PROGRAM AS SPRINGBOARDS. THESE FELLOWSHIPS FREE SCHOLARS FROM THEIR ACADEMIC RESPONSIBILITIES FOR A YEAR TO GIVE THEM TIME TO MAKE SIGNIFICANT PROGRESS ON THE COMPLETION OF A MAJOR BOOK. AWARD SELECTION IS MADE BY THE INSTITUTE'S COMMITTEE ON RESEARCH, SCHOLARSHIP AND EDUCATION. FUNDING DECISIONS, VIA AN APPLICATION PROCESS, ARE BASED ON QUALITY AND THE SIGNIFICANCE OF THE PROJECT WITHIN THE CONTEXT OF THE EXISTING SCHOLARLY LITERATURE. OTHER REQUIREMENTS INCLUDE A PROJECT DESCRIPTION, BIBLIOGRAPHY, THREE LETTERS OF REFERENCE AND AN INSTITUTIONAL SUPPORT STATEMENT. IF AWARDED A TRUMAN-KAUFFMAN SCHOLAR FELLOWSHIP, A SCHOLAR AGREES TO PUBLISH A SIGNIFICANT WORK OF SCHOLARSHIP STEMMING FROM HIS OR HER RESEARCH, PREFERABLY A BOOK TO BE PUBLISHED, CONTINGENT UPON THE STANDARD PEER-REVIEW PROCESS, BY CAMBRIDGE UNIVERSITY PRESS. SCHOLARS ALSO

Part IV Supplemental Information

AGREE TO PRESENT THEIR FINDINGS THROUGH THE TRUMAN-KAUFFMAN SCHOLARS PROGRAM'S PUBLIC COMPONENT, WHICH MAY INCLUDE A COMBINATION OF ACADEMIC CONFERENCES AND PUBLIC LECTURES. AWARDEES AGREE TO PROVIDE THE TRUMAN LIBRARY WITH COPIES OF ANY PUBLICATION RESULTING FROM RESEARCH SUPPORTED BY ONE OF THESE FELLOWSHIPS. THESE AWARDS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEE OR THEIR INSTITUTION IN TWO INSTALLMENTS. AWARDEES ARE REQUIRED TO SUBMIT A PROGRESS REPORT ON THE WORK DONE NO LATER THAN NINE MONTHS FROM ISSUANCE OF THE SECOND INSTALLMENT.

THE HARRY S. TRUMAN BOOK AWARD IS GIVEN IN RECOGNITION OF THE BEST BOOK PUBLISHED WITHIN A TWO-YEAR PERIOD THAT DEALS PRIMARILY AND SUBSTANTIALLY WITH THE LIFE AND CAREER OF HARRY S. TRUMAN OR OF THE PUBLIC AND FOREIGN POLICY ISSUES WHICH WERE PROMINENT DURING THE TRUMAN ADMINISTRATION. PUBLISHERS ARE REQUIRED TO SUBMIT SIX COPIES OF AN APPROPRIATE ENTRY TO THE COMMITTEE ON RESEARCH, SCHOLARSHIP AND EDUCATION FOR EVALUATION AND AWARD SELECTION. AWARDS ARE GIVEN IN EVEN-NUMBERED YEARS. ONE-TIME PAYMENTS ARE DISBURSED DIRECTLY AND PAYABLE TO THE AWARDEE AND REQUIRE NO FURTHER MONITORING.

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.

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Name of the organization	Employer identification number
THE HARRY S. TRUMAN LIBRARY INSTITUTE	43-6042632

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

THE HARRY S. TRUMAN LIBRARY INSTITUTE, A NONPROFIT 501(C)(3) ORGANIZATION, IS DEDICATED TO THE PRESERVATION, ADVANCEMENT, AND OUTREACH ACTIVITIES OF THE HARRY S. TRUMAN LIBRARY AND MUSEUM, ONE OF OUR NATION'S 13 PRESIDENTIAL LIBRARIES OVERSEEN BY THE NATIONAL ARCHIVES AND RECORDS ADMINISTRATION. TOGETHER WITH ITS PUBLIC PARTNER, THE TRUMAN LIBRARY INSTITUTE PRESERVES THE ENDURING LEGACY OF AMERICA'S 33RD PRESIDENT TO ENRICH THE PUBLIC'S UNDERSTANDING OF HISTORY, THE PRESIDENCY, PUBLIC POLICY, AND CITIZENSHIP. THE INSTITUTE PROVIDES FUNDING AND SUPPORT FOR THE HARRY S. TRUMAN LIBRARY AND MUSEUM'S EXHIBITIONS, EDUCATION PROGRAMS, CONFERENCES, FORUMS AND OTHER PUBLIC OUTREACH PROGRAMS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

EDUCATION:

EACH YEAR, SCHOOLCHILDREN AND THEIR TEACHERS RELY ON OUR NATION'S "BEST PRESIDENTIAL MUSEUM" AS AN ESSENTIAL RESOURCE FOR HISTORY EDUCATION. DONOR SUPPORT HELPS OPEN DOORS TO SOME OF THE GREATEST LESSONS IN LEADERSHIP OUR COUNTRY HAS TO OFFER, THROUGH MUSEUM TOURS, OUTREACH PROGRAMS, EDUCATOR WORKSHOPS, CURRICULA, AND THE NATIONALLY ACCLAIMED WHITE HOUSE DECISION CENTER. PRESIDENT TRUMAN'S LEGACY TEACHES STUDENTS THAT BY OUR VALUES, DECISIONS AND INVESTMENTS, ORDINARY PEOPLE CAN MAKE AN EXTRAORDINARY DIFFERENCE. IT'S WHY KIDS LOVE HARRY TRUMAN - BECAUSE IN HIM THEY CAN SEE THEIR OWN POTENTIAL FOR GREATNESSS.

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DURING THE 2012-2013 SCHOOL YEAR, A TOTAL OF 31,574 STUDENTS AND 1,126 TEACHERS PARTICIPATED IN THE TRUMAN LIBRARY INSTITUTE'S CORE EDUCATIONAL PROGRAMS.

MORE SPECIFICALLY:

WHITE HOUSE DECISION CENTER - FLAGSHIP EDUCATIONAL PROGRAM PRESENTED AT THE HARRY S. TRUMAN LIBRARY AND MUSEUM. SINCE IT OPENED IN 2001, THE WHITE HOUSE DECISION CENTER HAS WELCOMED MORE THAN 60,000 STUDENTS FROM ACROSS THE NATION. PARTICIPANTS ARE GIVEN THE OPPORTUNITY TO STEP INTO A RECREATION OF THE WEST WING OF THE WHITE HOUSE AND INTO THE SHOES OF PRESIDENT TRUMAN, HIS CABINET MEMBERS AND ADVISORS, AND MEMBERS OF THE MEDIA. DESIGNED AS A HANDS-ON HISTORY LAB, THE WHITE HOUSE DECISION CENTER STENGTHENS STUDENT AND ADULT SKILLS IN INFORMATION GATHERING AND ANALYSIS, PROBLEM SOLVING, DECISION-MAKING, LEADERSHIP, AND COMMUNICATION, WHILE DEEPENING KNOWLEDGE OF HISTORY AND GOVERNMENT. IT IS CONSIDERED THE STANDARD-BEARER FOR PRESIDENTIAL LIBRARIES NATIONWIDE. DURING THE 2012-13 SCHOOL YEAR, 5,234 STUDENTS (10% INCREASE FROM THE PREVIOUS YEAR) AND 325 ADULTS (28% INCREASE FROM THE PREVIOUS YEAR) PARTICIPATED IN THE WHITE HOUSE DECISION CENTER PROGRAM.

THE "BUS STOPS HERE" FIELD TRIP GRANT PROGRAM - 5,390 STUDENTS FROM FINANCIALLY-STRAPPED SCHOOL DISTRICTS WERE ABLE TO VISIT THE TRUMAN LIBRARY DURING THE 2012-2013 SCHOOL YEAR THANKS TO THIS PROGRAM (31% INCREASE FROM THE PREVIOUS YEAR). GRANT SCHOLARSHIP FUNDS CAN BE USED TO COVER MUSEUM ADMISSION AND WHITE HOUSE DECISION CENTER FEES, BUS TRANSPORTATION AND SUBSTITUTE TEACHER COSTS.

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GUIDED MUSEUM TOURS - THESE DOCENT-LED TOURS ARE OFFERED TO GRADES 4-12 AND INCLUDE A REPLICA OF PRESIDENT TRUMAN'S OVAL OFFICE, PRESIDENTIAL YEARS EXHIBITION, INTERACTIVE DECISION THEATERS, HANDS-ON ACTIVITES IN THE HARRY TRUMAN'S LIFE AND TIMES GALLERY, THE GRAVE SITES OF PRESIDENT AND MRS. TRUMAN, PRESIDENT TRUMAN'S WORKING OFFICE, TRAVELING AND SPECIAL EXHIBITIONS. DURING THE 2012-2013 SCHOOL YEAR, 8,870 STUDENTS (25% INCREASE FROM THE PREVIOUS YEAR) PARTICIPATED IN THE TRUMAN LIBRARY'S MUSEUM TOUR PROGRAM.

TRUMAN FOOTLOCKER - 5,474 STUDENTS (2% INCREASE FROM THE PREVIOUS YEAR) EXPERIENCED THIS POPULAR HANDS-ON CLASSROOM RESOURCE FILLED WITH REPLICAS OF TRUMAN-RELATED ARTIFACTS, PRIMARY DOCUMENTS AND PHOTOGRAPHS. THE TRUNK IS ACCOMPANIED BY AGE APPROPRIATE LESSON PLANS DESIGNED TO TEACH STUDENTS ABOUT THE VARIOUS PHASES OF PRESIDENT TRUMAN'S LIFE.

NATIONAL HISTORY DAY - EACH YEAR, THE TRUMAN LIBRARY IS THE HOST SITE FOR THE GREATER KANSAS CITY REGIONAL NATIONAL HISTORY DAY COMPETITION. ON MARCH 2, 2013, 480 STUDENTS (9% INCREASE FROM THE PREVIOUS YEAR) ATTENDED THE COMPETITION; 69 STUDENTS WERE CHOSEN TO ADVANCE TO THE 2013 STATE FINALS IN COLUMBIA, MISSOURI, AND 7 ADVANCED TO THE NATIONAL FINALS IN COLLEGE PARK, MARYLAND.

TENTH ANNUAL SUMMER TEACHER CONFERENCE - "U.S. PRESIDENTS AND THE MIDDLE EAST." THIRTY-SIX TEACHERS ATTENDED A WEEK-LONG TEACHER CONFERENCE AT THE TRUMAN LIBRARY, JULY 15-19, 2013. CURRICULUM MATERIALS BASED ON THE CONFERENCE WERE DEVELOPED FOR USE IN THE

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CLASSROOM AND POSTED ON THE TRUMAN LIBRARY'S WEBSITE. TO DATE, OVER 200 LESSON PLANS HAVE BEEN POSTED ONLINE.

ADDITIONAL EDUCATIONAL RESOURCES PROVIDED TO TEACHERS AND STUDENTS DURING THE 2012-2013 SCHOOL YEAR: LESSON PLANS AND CURRICULUM GUIDES, 4,494 STUDENTS REACHED; VIDEO LENDING LIBRARY, 1,549 STUDENTS REACHED; CLASSROOM PRESENTATIONS, 5,074 STUDENTS REACHED; EDUCATOR WORKSHOPS, 90 TEACHER PARTICIPANTS; PRESIDENTIAL TRIVIA CONTEST, 54 STUDENT PARTICIPANTS; NEARLY 8,300 EDUCATORS RECEIVED THE INSTITUTE'S EDUCATIONAL PROGRAM CATALOG AND 6,056 EDUCATORS WERE REACHED THROUGH TARGETED INFORMATIONAL E-BLASTS.

GRANTS AND AWARDS PROGRAM - INSTITUTE FUNDING, COMBINED WITH THE RICH ARCHIVAL RESOURCES OF THE TRUMAN LIBRARY, CONTINUES TO FACILITATE THE IMPORTANT WRITING OF ARTICLES, THESES, DOCTORAL DISSERTATIONS AND BOOKS THAT NOT ONLY ADD TO THE TRUMAN HISTORIOGRAPHY, BUT ALSO TO THE ONGOING NATIONAL DISCOURSE ON PRESENT-DAY ISSUES SIMILAR TO ONES THE TRUMAN ADMINISTRATION WRESTLED WITH MORE THAN SIXTY YEARS AGO. RESEARCH GRANTS ARE ESSENTIAL TO STUDENTS AND SCHOLARS WHO OTHERWISE MIGHT FIND IT FINANCIALLY DIFFICULT TO TRAVEL TO THE TRUMAN LIBRARY TO CONDUCT THEIR RESEARCH. DISSERTATION YEAR FELLOWSHIPS ALLOW GRADUATE STUDENTS TIME AWAY FROM TEACHING TO COMPLETE THEIR MANUSCRIPTS. DURING FISCAL YEAR 2013, THE INSTITUTE AWARDED 23 RESEARCH GRANTS AND 2 DISSERATION YEAR FELLOWSHIPS FOR A COMBINED TOTAL OF $57,157.

TRUMAN-KAUFFMAN SCHOLARS PROGRAM - TO DATE, 5 OF THE NATION'S TOP HISTORIANS HAVE BEEN AWARDED MAJOR GRANTS THROUGH THE TRUMAN LIBRARY INSTITUTE'S PRESTIGIOUS NEW FELLOWSHIP PROGRAM FOR SENIOR SCHOLARS.

Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE

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THIS PROGRAM WILL ASSIST A TOTAL OF 6 SCHOLARS OVER A THREE-YEAR PERIOD, FREEING THEM FROM THEIR ACADEMIC RESPONSIBILITIES FOR A YEAR IN ORDER TO COMPLETE A MAJOR BOOK FOCUSED ON ISSUES OF MODERNIZATION AND DEVELOPMENT STEMMING FROM PRESIDENT TRUMAN'S MARSHALL PLAN AND POINT FOUR PROGRAM. CAMBRIDGE UNIVERSITY PRESS HAS CONTRACTUALLY AGREED TO BE THE PRIMARY PUBLISHER OF TRUMAN-KAUFFMAN SCHOLAR BOOKS. TWO TRUMAN-KAUFFMAN SCHOLAR FELLOWSHIPS TOTALING $72,500 WERE FUNDED IN FISCAL YEAR 2013.

DIGITAL ARCHIVES - PRESERVATION AND WORLDWIDE ACCESS TO THE TRUMAN LIBRARY'S ARCHIVAL COLLECTIONS PROVIDE CRITICAL INSIGHT INTO THE HISTORY OF THE TRUMAN YEARS, THE COLD WAR, THE REBUILDING OF EUROPE, THE RECOGNITION OF THE STATE OF ISRAEL, CIVIL RIGHTS, DOMESTIC POLICY AND POLITICS, AND THE NATURE OF DECISION-MAKING AND LEADERSHIP. KEY ACCOMPLISHMENTS IN FISCAL YEAR 2013 INCLUDE: 1) THE PROCESSING OF NEARLY 33,400 PAGES FROM THE TRUMAN POST-PRESIDENTIAL PAPERS INCLUDING 14,000 EXTREMELY FRAGILE, HIGH-PRIORITY DOCUMENTS; 2) ACCESSIONING AND DIGITIZING THE LAST 1,300 PAGES OF THE 2,300 IN THE ARTHUR A. GILBERT COLLECTION; 3) ENTRY OF THE LAST 2,269 OBJECTS INTO THE MUSEUM'S COLLECTION DATABASE; 1,200 DIGITAL IMAGES MADE OF 450 OF THE OBJECTS. SIX MILLION STUDENTS, TEACHERS, RESEARCHERS, HISTORIANS AND VISITORS FROM AROUND THE WORLD ACCESSED WWW.TRUMANLIBRARY.ORG IN FISCAL YEAR 2013. THE WEBSITE RECEIVED 54,064,422 INDIVIDUAL "HITS" DURING THIS PERIOD.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:

PUBLIC OUTREACH PROGRAMS:

Name of the organization: THE HARRY S. TRUMAN LIBRARY INSTITUTE | Employer identification number: 43-6042632

THE TRUMAN LIBRARY INSTITUTE PROVIDES FUNDING AND SUPPORT FOR THE HARRY S. TRUMAN LIBRARY AND MUSEUM'S PUBLIC OUTREACH PROGRAMS. TENS OF THOUSANDS OF PEOPLE WERE REACHED THROUGH LIVE AUDIENCE EXPERIENCES, WEB CASTS, AND TELEVISION AND RADIO RE-BROADCASTS. THERE WAS A TOTAL OF 29 PROGRAMS AND EVENTS THROUGHOUT THE FISCAL YEAR 2013 PERIOD THAT DREW AN AUDIENCE OF APPROXIMATELY 9,693 (42% INCREASE FROM THE PREVIOUS YEAR). THESE PROGRAMS INCLUDED:

"HAIL TO THE CHIEFS: PRESIDENTIAL LECTURE SERIES" - THE TRUMAN LIBRARY INSTITUTE AND THE KANSAS CITY PUBLIC LIBRARY CONTINUED ITS ACCLAIMED PRESIDENTIAL BIOGRAPHY SERIES IN 2013 WITH 6 NEW CO-PRESENTED LECTURES. AS WAS THE CASE IN 2012, THIS SERIES FEATURED NATIONAL SCHOLARS AND HISTORIANS DISCUSSING SOME OF AMERICA'S MOST SIGNICANT CHIEF EXECUTIVES. FY13 HAIL TO THE CHIEFS PROGRAMS DREW A COMBINED AUDIENCE OF APPROXIMATELY 2,290 WHICH INCLUDED:

- THOMAS JEFFERSON | HENRY WIENCEK | OCTOBER 25, 2012
- THEODORE ROOSEVELT | RICK MARSCHALL | NOVEMBER 1, 2012
- RANKING THE PRESIDENTS | ROBERT W. MERRY | NOVEMBER 27, 2012
- GEORGE WASHINGTON | HENRY WIENCEK | FEBRUARY 20, 2013
- ABRAHAM LINCOLN | DAVID VON DREHLE | MARCH 13, 2013
- IKE AND DICK | JEFFREY FRANK | SEPTEMBER 12, 2013

"BEYOND THE GOWNS: FIRST LADIES IN AMERICAN HISTORY" - THE TRUMAN LIBRARY INSTITUTE AND THE KANSAS CITY PUBLIC LIBRARY CO-DEVELOPED AND CO-PRESENTED A NEW SERIES IN 2013 FOCUSED ON FIRST LADIES. ACCLAIMED JOURNALISTS AND HISTORIANS EXPLORED THE LIVES, STRUGGLES AND

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ACCOMPLISHMENTS OF FIVE LEADING LADIES. FY13 BEYOND THE GOWNS PROGRAMS DREW A COMBINED AUDIENCE OF APPROXIMATELY 2,125 WHICH INCLUDED:

- MICHELLE OBAMA | CARL M. CANNON | MARCH 6, 2013
- ABIGAIL ADAMS | HENRY ADAMS | APRIL 3, 2013
- LADY BIRD JOHNSON | MICHAEL GILLETTE | MAY 9, 2013
- MARTHA JEFFERSON RANDOLPH | CYNTHIA A. KIERNER | JUNE 5, 2013
- BETTY FORD | JOHN ROBERT GREENE | JUNE 19, 2013

"LEGAL LANDMARKS: SUPREME COURT DECISIONS THAT CHANGED AMERICA" - THE TRUMAN LIBRARY INSTITUTE, THE KANSAS CITY PUBLIC LIBRARY AND THE FEDERAL COURT HISTORICAL SOCIETY CO-DEVELOPED AND CO-PRESENTED THIS NEW 2013 SERIES WHICH EXPLORED SIX MAJOR SUPREME COURT DECISIONS THAT CHANGED AMERICA AND MOLDED OUR SOCIETY AND LIVES. IT FEATURED NATIONAL EXPERTS ON THE SUPREME COURT AND THE LEGAL HISTORY OF OUR NATION. RETIRED JUSTICE SANDRA DAY O'CONNOR INAUGURATED THE PROGRAM TO A RECORD CROWD OF NEARLY 1,000 ATTENDEES. THIS SERIES ALSO FEATURED THE ASSISTANCE OF TWO OTHER PARTNERING ORGANIZATIONS - THE UNIVERSITY PRESS OF KANSAS AND THE UNIVERSITY OF KANSAS SCHOOL OF LAW. FY13 LEGAL LANDMARKS PROGRAMS DREW A COMBINED AUDIENCE OF APPROXIMATELY 2,573 WHICH INCLUDED:

- OUT OF ORDER: STORIES FROM THE HISTORY OF THE SUPREME COURT | JUSTICE SANDRA DAY O'CONNOR | JUNE 3, 2013
- DRED SCOTT AND THE POLITICS OF SLAVERY | EARL M. MALTZ | JUNE 26, 2013
- PLESSY V. FERGUSON | WILLIAMJAMES HULL HOFFER | JULY 23, 2013
- MAPP V. OHIO | CAROLYN N. LONG | AUGUST 29, 2013

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- ROE V. WADE | PETER CHARLES HOFFER | SEPTEMBER 19, 2013

"DATELINE: WASHINGTON WITH DAVID VON DREHLE" - THE TRUMAN LIBRARY INSTITUTE AND THE KANSAS CITY PUBLIC LIBRARY CO-DEVELOPED AND CO-PRESENTED A THIRD NEW SERIES IN 2013 THAT FEATURED TIME MAGAZINE EDITOR-AT-LARGE DAVID VON DREHLE, WHO HELD PUBLIC CONVERSATIONS ON CURRENT AFFAIRS WITH SOME OF AMERICA'S LEADING JOURNALISTS. FY13 DATELINE: WASHINGTON PROGRAMS DREW A COMBINED AUDIENCE OF APPROXIMATELY 700 WHICH INCLUDED:

- MIKE ALLEN - POLITICO | POLITICS, PARTISANSHIP AND POWER | JULY 17, 2013
- JOEL ACHENBACH - THE WASHINGTON POST | THE FUTURE OF SPACE EXPLORATION | AUGUST 20, 2013
- MEGAN MCARDLE - BLOOMBERG | FREEING THE ECONOMY | SEPTEMBER 17, 2013

OTHER TRUMAN LIBRARY INSTITUTE SIGNATURE EVENTS PRESENTED DURING THE FISCAL YEAR 2013 PERIOD:

OCTOBER 27, 2012 - SIXTH ANNUAL HOWARD & VIRGINIA BENNETT FORUM ON THE PRESIDENCY PRESENTED "DIVIDED WE STAND: AMERICAN PRESIDENTS, CONGRESS, AND THE CONFLICT OF POWER." FEATURED NOTED JOURNALIST MARVIN KALB, POLITICAL COMMENTATOR MARGARET HOOVER, HISTORIAN TIMOTHY NAFTALI, AND FORMER CONGRESSMAN JIM SLATTERY. ATTENDANCE WAS APPROXIMATELY 425.

NOVEMBER 11, 2012 - THE HONORABLE IKE SKELTON VETERANS DAY CEREMONY AT THE TRUMAN LIBRARY. THIS PROGRAM WAS CREATED BOTH TO HONOR VETERANS AND TO RECOGNIZE THE MILITARY SERVICE OF HARRY S. TRUMAN AND THE ADVOCACY

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OF CONGRESSMAN IKE SKELTON, FORMER U.S. HOUSE ARMED SERVICES COMMITTEE CHAIR. MAJOR GENERAL ROBERT H. SCALES PROVIDED THE KEYNOTE ADDRESS. ALSO FEATURED WERE CONGRESSMAN EMANUEL CLEAVER II, JAZZ ICON IDA MCBETH, AND THE UNIVERSITY OF MISSOURI-KANSAS CITY HONOR BRASS QUINTET. WENTWORTH MILITARY ACADEMY CADETS PROVIDED A 21-GUN SALUTE AND THE PLAYING OF "TAPS." ATTENDANCE WAS APPROXIMATELY 200.

APRIL 11, 2013 - "WILD ABOUT HARRY" AND THE 2013 HARRY S. TRUMAN LEGACY OF LEADERSHIP AWARD. FEATURED SPEAKERS WERE NANCY GIBBS AND MICHAEL DUFFY AND THE AWARD RECIPIENT WAS FORMER CHAIRMAN OF THE JOINT CHIEFS OF STAFF GENERAL RICHARD B. MYERS. ATTENDANCE WAS APPROXIMATELY 550.

JUNE 6, 2013 - SIXTH ANNUAL MEMBERS NIGHT AT THE MUSEUM FEATURED A RECEPTION AND PRIVATE TOUR OF THE SPECIAL EXHIBITION, "BENTON AND TRUMAN: LEGENDS OF THE MISSOURI BORDER." ATTENDANCE WAS APPROXIMATELY 200.

SEPTEMBER 13, 2013 - THE FIRST FALL MEMBERS NIGHT AT THE MUSEUM FEATURED A RECEPTION AND PRIVATE VIEWING OF "GEORGE WASHINGTON'S ACTS OF CONGRESS" FOLLOWED BY A PROGRAM WITH MOUNT VERNON ASSISTANT CURATOR JESSIE MACLEOD. ATTENDANCE WAS APPROXIMATELY 200.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:

EXHIBITIONS:

ONGOING - "HARRY S. TRUMAN: THE PRESIDENTIAL YEARS" PERMANENT EXHIBIITION. THE MAJOR ISSUES AND EVENTS OF HARRY TRUMAN'S PRESIDENCY

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ARE HIGHLIGHTED IN THIS 10,500 SQUARE-FOOT CORE EXHBIITION. FEATURING TWO DECISION THEATERS, ENHANCED AUDIO AND VIDEO PROGRAMS, AND INTERACTIVE ELEMENTS, THIS EXHIBITION FORMS THE CENTERPIECE OF THE TRUMAN LIBRARY'S PERMANENT EXHIBITIONS.

ONGOING - "HARRY S. TRUMAN: HIS LIFE AND TIMES" PERMANENT EXHIBITION. THE LIFE OF HARRY TRUMAN IS EXPLORED IN THIS 4,500 SQUARE-FOOT PERMANENT EXHIBITION. THE EXHIBITION FOLLOWS TRUMAN'S LIFE FROM HIS EARLY YEARS IN SCHOOL TO HIS LATER EXPERIENCES AS AN ENTREPRENEUR AND A FARMER, AS A WORLD WAR I SOLDIER, AND A HABERDASHER. IT ALSO CHRONICLES HIS POLITICAL CAREER AS A COUNTY JUDGE, U.S. SENATOR, VICE PRESIDENT AND PRESIDENT. TRUMAN'S POST PRESIDENTIAL YEARS AND HIS CLOSE FAMILY TIES ARE ALSO EXPLORED. THE EXHIBITION FEATURES FOUR DISCOVERY AREAS AND AN INTERACTIVE QUIZ WHERE CHILDREN CAN PARTICIPATE IN ENGAGING ACTIVITIES TIED TO THE LIFE OF HARRY TRUMAN.

ONGOING - "TRUMAN WORKING OFFICE" PERMANENT EXHIBITION. FROM THE TIME THE TRUMAN LIBRARY AND MUSEUM OPENED IN 1957, HARRY TRUMAN MAINTAINED AN OFFICE WITHIN THE LIBRARY, OFTEN WORKING FIVE TO SIX DAYS A WEEK WRITING HIS MEMOIRS, ARTICLES, LETTERS AND MEETING WITH DIGNITARIES AND CELEBRITIES. FOLLOWING MR. TRUMAN'S DEATH IN 1972, THE OFFICE BECAME AN EXHIBIT THAT COULD BE VIEWED BY THE PUBLIC. IN 2008-2009, THE EXHIBIT UNDERWENT A $1.4 MILLION RENOVATION WITH FUNDS RAISED BY THE TRUMAN LIBRARY INSTITUTE. THE RENOVATION INCLUDED CONSTRUCTION OF A NEW PAVILION, ADJACENT TO THE OFFICE, BUILT TO HOUSE STATE-OF-THE-ART VIDEO AND INTERACTIVE STATIONS AND PHOTOGRAPHIC WALL PANELS EXPLAINING THE OFFICE'S RICH HISTORY AND CONTENTS.

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THE TRUMAN LIBRARY INSTITUTE PROVIDED FABRICATION AND/OR PROGRAM FUNDING FOR THREE SPECIAL EXHIBITIONS ON DISPLAY AT THE HARRY S. TRUMAN LIBRARY AND MUSEUM DURING FISCAL YEAR 2013:

- "TRACING THE TRUMANS: AN AMERICAN STORY," EXPLORED THE ANCESTORS OF HARRY AND BESS - THE TRUMANS, WALLACES, YOUNGS, GATES AND WILLOCKS - WHO CAME TO MISSOURI, LIKE SO MANY OTHERS, LOOKING FOR OPPORTUNITY AND THE PROMISE OF A BETTER LIFE. AMONG THE NEVER-BEFORE-DISPLAYED ARTIFACTS WERE HARRY TRUMAN'S 1914 BUGGY AND ITEMS FROM THE MARGARET TRUMAN DANIEL ESTATE. THE EXHIBITION WAS ON DISPLAY FROM MARCH 8, 2012 THROUGH JANUARY 6, 2013.

- "BENTON AND TRUMAN: LEGENDS OF THE MISSOURI BORDER" EXAMINED THE SIMILARITIES OF MISSOURI NATIVES THOMAS HART BENTON AND HARRY TRUMAN, AND THE FRIENDSHIP THAT DEVELOPED AFTER BENTON WAS COMMISSIONED TO PAINT THE TRUMAN LIBRARY'S AMBITIOUS "INDEPENDENCE AND THE OPENING OF THE WEST" MURAL IN 1958. THE EXHIBITION FEATURED A NUMBER OF BENTON'S PAINTINGS AND DRAWINGS, AS WELL AS MEMORABILIA ASSOCIATED WITH FORMER PRESIDENT TRUMAN'S INTEREST IN THE HISTORY OF THE TRAILS AND THE AMERICAN WEST. ALSO INCLUDED WERE EXAMPLES OF CORRESPONDENCE BETWEEN THE TWO MEN, AS WELL AS THEIR OWN PRIVATE NOTES CONVEYING THEIR IMPRESSIONS OF EACH OTHER. THE EXHIBITION WAS ON DISPLAY FROM MARCH 7 THROUGH OCTOBER 14, 2013.

- "GEORGE WASHINGTON'S ACTS OF CONGRESS" - GEORGE WASHINGTON'S PERSONAL COPY OF THE CONSTITUTION, THE BILL OF RIGHTS, AND OTHER LEGISLATION PASSED BY THE FIRST CONGRESS COMPLETE WITH HIS PERSONAL ANNOTATIONS. THIS SPECIAL EXHIBIT, COURTESY OF THE MOUNT VERNON LADIES ASSOCIATION,

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CONCLUDED ITS NATIONWIDE TOUR OF THE NATIONAL ARCHIVES AND RECORDS ADMINISTRATION'S PRESIDENTIAL LIBRARIES AT THE TRUMAN LIBRARY, SEPTEMBER 12-21, 2013.

TOTAL MUSEUM ATTENDANCE DURING THE FISCAL YEAR 2013 PERIOD WAS APPROXIMATELY 76,145.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

PUBLIC RELATIONS AND ADVERTISING, DOCUMENTARY ACCESS, VOLUNTEER & INTERN PROGRAM, AND PREVENTATIVE MAINTENANCE

EXPENSES $ 340,950. INCLUDING GRANTS OF $ 0. REVENUE $ 3,008.

FORM 990, PART VI, SECTION B, LINE 11: AN INDEPENDENT ACCOUNTING FIRM PREPARES AND REVIEWS THE 990. THE 990 IS THEN REVIEWED BY THE ORGANIZATION'S BUDGET, FINANCE, AND INVESTMENT COMMITTEE AND ALSO ALL ACCOUNTING PERSONNEL. ANY QUESTIONS AND CONCERNS THE ORGANIZATION'S BUDGET, FINANCE, AND INVESTMENT COMMITTEE AND ACCOUNTING PERSONNEL HAVE ARE ADDRESSED AND ANY CORRECTIONS OR CLARIFICATIONS THAT NEED TO BE MADE ARE MADE. THE FINAL FORM 990 WITH ALL REQUIRED SCHEDULES IS THEN PROVIDED TO ALL VOTING MEMBERS OF THE BOARD PRIOR TO FILING THE 990.

FORM 990, PART VI, SECTION B, LINE 12C: AT THE TIME OF HIRE OR ELECTION (IN THE CASE OF DIRECTORS) AND ANNUALLY HEREAFTER, THE OFFICERS, DIRECTORS, AND KEY EMPLOYEES SHALL PROVIDE THE APPLICABLE CONFLICT OF INTEREST DISCLOSURES WHICH BE COMPLETED TO IDENTIFY ANY RELATIONSHIPS, POSITIONS, OR CIRCUMSTANCES IN WHICH IT IS BELIEVED A CONFLICT MAY ARISE. IF A CONFLICT ARISES, THE OFFICER, DIRECTOR, OR KEY EMPLOYEE ABSTAINS FROM THE VOTE OF THE CONFLICTED TRANSACTION. AN APPROPRIATE REPORT SHALL BE SUBMITTED TO

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THE BOARD'S EXECUTIVE COMMITTEE CONCERNING ANY CONFLICT OF INTEREST DISCLOSED FOR MONITORING.

FORM 990, PART VI, SECTION B, LINE 15: THE TRUMAN LIBRARY INSTITUTE UTILIZES THE FOLLOWING:

1. COLLECTION AND USE OF COMPENSATION DATA FOR SIMILARLY QUALIFIED PERSONS IN COMPARABLE POSITIONS AT SIMILARLY SITUATED ORGANIZATIONS OR INSTITUTIONS WHICH CAN INCLUDE LOCAL AND REGIONAL NONPROFITS AND MUSEUMS, AS WELL AS REGIONAL AND NATIONAL PRESIDENTIAL LIBRARY FOUNDATIONS. BASE SALARIES WILL BE POSITIONED TO QUALIFICATIONS, EXPERIENCE, PERFORMANCE AND TENURE.

2. THE BOARD'S EXECUTIVE COMMITTEE, OR AN AD HOC COMMITTEE ON COMPENSATION APPOINTED BY THE BOARD CHAIR, WILL DETERMINE THE TOTAL COMPENSATION PACKAGE FOR THE EXECUTIVE DIRECTOR. THE EXECUTIVE DIRECTOR SHALL MAKE RECOMMENDATIONS FOR THE SALARIES AND INCENTIVE PAYMENTS FOR OTHER EXECUTIVES OR SALARIED EMPLOYEES. THESE AMOUNTS WILL BE PROVIDED ANNUALLY TO THE AD HOC COMMITTEE ON COMPENSATION FOR REVIEW AND APPROVAL. THE AD HOC COMMITTEE WILL REPORT THE AGGREGATE INCREASES TO EXECUTIVE COMMITTEE AND THE BOARD OF DIRECTORS FOR ITS APPROVAL VIA THE ANNUAL FISCAL YEAR BUDGET PROCESS OR ANY SUBSEQUENT BUDGET AMENDMENT REQUESTS THAT MAY FOLLOW.

3. THE INSTITUTE WILL RETAIN CONCURRENT WRITTEN OR ELECTRONIC DOCUMENTATION OF COMPENSATION DECISIONS AS THEY ARE MADE THAT WILL INCLUDE THE FOLLOWING INFORMATION: A) THE TERMS OF THE COMPENSATION AND THE DATE IT WAS APPROVED; B) THE COMPARABILITY DATA; C) THE MEMBERS OF THE EXECUTIVE COMMITTEE WHO WERE PRESENT DURING THE DEBATE AND THOSE WHO VOTED TO APPROVE A COMPENSATION DECISION; D) ANY ACTIONS TAKEN WITH RESPECT TO THE

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INVOLVEMENT OF A MEMBER WHO MAY HAVE A CONFLICT OF INTEREST.

FORM 990, PART VI, SECTION C, LINE 19: THE INSTITUTE'S GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST.

FORM 990, PART IV, LINE 12 & PART XII, LINE 2B & 2C

ACCOUNTING METHOD USED TO PREPARE FORM 990 AND AUDITED FINANCIAL STATEMENTS

THE FINANCIAL STATEMENTS WERE AUDITED, HOWEVER, THE FINANCIAL STATEMENTS WERE PREPARED ON THE MODIFIED CASH BASIS OF ACCOUNTING, WHICH IS A COMPREHENSIVE BASIS OF ACCOUNTING OTHER THAN ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA. THE ORGANIZATION DOES HAVE A COMMITTEE THAT ASSUMES RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT OF ITS FINANCIAL STATEMENTS AND SELECTION OF AN INDEPENDENT ACCOUNTANT.

ACCOUNTING METHOD USED TO PREPARE FORM 990

FORM 990, PART XII, LINE 1

THE ACCOUNTING METHOD USED TO PREPARE THE FORM 990 IS THE MODIFIED CASH BASIS OF ACCOUNTING. THIS IS THE SAME METHOD IN WHICH THE FINANCIAL STATEMENTS OF THE ORGANIZATION ARE PREPARED.

FORM 990, PART XII, LINE 2C:

THE ORGANIZATION HAS NOT CHANGED ITS OVERSIGHT OR SELECTION PROCESS.