AS AMENDED JANUARY 21,2008

Form **990** | **Return of Organization Exempt From Income Tax** | OMB No 1545-0047 **2006**

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

Department of the Treasury Internal Revenue Service

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

**Open to Public Inspection**

A For the 2006 calendar year, or tax year beginning , and ending

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

Please use IRS label or print or type. See Specific Instructions.

C Name of organization: The Rodale Institute

Number and street (or P O box if mail is not delivered to street address): 611 Siegfriedale Rd — Room/suite:

City or town: Kutztown — State or country: PA — ZIP + 4: 19530

D Employer identification number: 23-7206884

E Telephone number: 610-683-1400

F Accounting method: [ ] Cash [X] Accrual [ ] Other (specify) ▶

• Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)

H and I are not applicable to section 527 organizations

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

H(b) If "Yes," enter number of affiliates ▶

H(c) Are all affiliates included? [ ] Yes [ ] No (If "No," attach a list See instructions)

H(d) Is this a separate return filed by an organization covered by a group ruling? [ ] Yes [X] No

I Group Exemption Number ▶

G Website: ▶ www.rodaleinstitute.org

J Organization type (check only one) ▶ [X] 501(c) ( 3 ) ◀ (insert no ) [ ] 4947(a)(1) or [ ] 527

K Check here ▶ [ ] if the organization is not a 509(a)(3) supporting organization and its gross receipts are normally not more than $25 000 A return is not required but if the organization chooses to file a return be sure to file a complete return

M Check ▶ [ ] if the organization is not required to attach Sch. B (Form 990, 990-EZ, or 990-PF).

L Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 3,088,129

**Part I** **Revenue, Expenses, and Changes in Net Assets or Fund Balances** *(See the instructions.)*

| | | | | | | |
|---|---|---|---|---|---|---|
| Revenue | 1 | Contributions, gifts, grants, and similar amounts received: | | | | |
| | a | Contributions to donor advised funds | 1a | 0 | | |
| | b | Direct public support (not included on line 1a) | 1b | 997,227 | | |
| | c | Indirect public support (not included on line 1a) | 1c | 0 | | |
| | d | Government contributions (grants) (not included on line 1a) | 1d | 795,884 | | |
| | e | Total (add lines 1a through 1d) (cash $ 1,774,793 noncash $ 18,318 ) | | | 1e | 1,793,111 |
| | 2 | Program service revenue including government fees and contracts (from Part VII, line 93) | | | 2 | 38,601 |
| | 3 | Membership dues and assessments | | | 3 | 0 |
| | 4 | Interest on savings and temporary cash investments | | | 4 | 69,545 |
| | 5 | Dividends and interest from securities | | | 5 | 51,669 |
| | 6 a | Gross rents | 6a | | | |
| | b | Less: rental expenses | 6b | | | |
| | c | Net rental income or (loss) Subtract line 6b from line 6a | | | 6c | 0 |
| | 7 | Other investment income (describe ▶ Interest Income from Note Rec. ) | | | 7 | 897,943 |

| | | (A) Securities | | (B) Other |
|---|---|---|---|---|
| 8 a | Gross amount from sales of assets other than inventory | 68,042 | 8a | 2,629 |
| b | Less: cost or other basis and sales expenses | 67,998 | 8b | 0 |
| c | Gain or (loss) (attach schedule) | 44 | 8c | 2,629 |

| | | | | | | |
|---|---|---|---|---|---|---|
| | d | Net gain or (loss) Combine line 8c, columns (A) and (B) STATEMENT 1 | | | 8d | 2,673 |
| | 9 | Special events and activities (attach schedule) If any amount is from gaming, check here ▶ [ ] | | | | |
| | a | Gross revenue (not including $ 0 of contributions reported on line 1b) | 9a | 0 | | |
| | b | Less: direct expenses other than fundraising expenses | 9b | 0 | | |
| | c | Net income or (loss) from special events Subtract line 9b from line 9a | | | 9c | 0 |
| | 10 a | Gross sales of inventory, less returns and allowances | 10a | 133,177 | | |
| | b | Less: cost of goods sold STATEMENT 2 | 10b | 69,193 | | |
| | c | Gross profit or (loss) from sales of inventory (attach schedule) Subtract line 10b from line 10a | | | 10c | 63,984 |
| | 11 | Other revenue (from Part VII, line 103) | | | 11 | 33,412 |
| | 12 | **Total revenue.** Add lines 1e, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11 | | | 12 | 2,950,938 |
| Expenses | 13 | Program services (from line 44, column (B)) | | | 13 | 1,746,472 |
| | 14 | Management and general (from line 44, column (C)) | | | 14 | 1,010,389 |
| | 15 | Fundraising (from line 44, column (D)) | | | 15 | 181,265 |
| | 16 | Payments to affiliates (attach schedule) | | | 16 | 0 |
| | 17 | **Total expenses.** Add lines 16 and 44, column (A) | | | 17 | 2,938,126 |
| Net Assets | 18 | Excess or (deficit) for the year Subtract line 17 from line 12 | | | 18 | 12,812 |
| | 19 | Net assets or fund balances at beginning of year (from line 73, column (A)) | | | 19 | 12,316,912 |
| | 20 | Other changes in net assets or fund balances (attach explanation) STATEMENT 3 | | | 20 | 75,889 |
| | 21 | Net assets or fund balances at end of year. Combine lines 18, 19, and 20 | | | 21 | 12,405,613 |

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For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions. Form **990** (2006)

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## Part II Statement of Functional Expenses

All organizations must complete column (A) Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others *(See the instructions )*

| *Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.* | | (A) Total | (B) Program services | (C) Management and general | (D) Fundraising |
|---|---|---|---|---|---|
| 22 a Grants paid from donor advised funds (attach schedule) (cash $ 0 noncash $ 0 ) If this amount includes foreign grants, check here ▶☐ | 22a | 0 | 0 | | |
| 22 b Other grants and allocations (attach schedule) (cash $ 1,750 noncash $ 0 ) If this amount includes foreign grants, check here ▶☐ | 22b | 1,750 | 1,750 | STATEMENT 4 | |
| 23 Specific assistance to individuals (attach schedule) | 23 | 0 | 0 | | |
| 24 Benefits paid to or for members (attach schedule) | 24 | 0 | | | |
| 25 a Compensation of current officers, directors, key employees, etc listed in Part V-A (attach schedule) | 25a | 368,338 | 0 | 368,338 | 0 |
| b Compensation of former officers, directors, key employees, etc listed in Part V-B (attach schedule) | 25b | 0 | 0 | 0 | 0 |
| c Compensation and other distributions not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) (attach schedule) | 25c | 0 | 0 | 0 | 0 |
| 26 Salaries and wages of employees not included on lines 25a, b, and c | 26 | 1,316,743 | 1,046,740 | 206,218 | 63,785 |
| 27 Pension plan contributions not included on lines 25a, b, and c | 27 | 70,986 | 40,607 | 28,952 | 1,427 |
| 28 Employee benefits not included on lines 25a – 27 | 28 | 198,298 | 113,435 | 80,876 | 3,987 |
| 29 Payroll taxes | 29 | 114,376 | 65,428 | 46,648 | 2,300 |
| 30 Professional fundraising fees | 30 | 0 | 0 | 0 | 0 |
| 31 Accounting fees | 31 | 44,068 | | 44,068 | |
| 32 Legal fees | 32 | 0 | 0 | 0 | 0 |
| 33 Supplies | 33 | 92,062 | 58,521 | 25,639 | 7,902 |
| 34 Telephone | 34 | 31,801 | 21,620 | 9,086 | 1,095 |
| 35 Postage and shipping | 35 | 22,323 | 6,293 | 1,779 | 14,251 |
| 36 Occupancy | 36 | 10,512 | 10,000 | 512 | 0 |
| 37 Equipment rental and maintenance | 37 | 113,858 | 107,367 | 3,095 | 3,396 |
| 38 Printing and publications | 38 | 44,140 | 7,113 | 181 | 36,846 |
| 39 Travel | 39 | 64,113 | 50,861 | 9,689 | 3,563 |
| 40 Conferences conventions, and meetings | 40 | 7,093 | 904 | 5,494 | 695 |
| 41 Interest | 41 | 0 | | | |
| 42 Depreciation, depletion, etc (attach schedule) STMT 9 | 42 | 86,870 | 67,927 | 18,943 | 0 |
| 43 Other expenses not covered above (itemize): | | | | | |
| a Professional Services | 43a | 318,483 | 125,801 | 151,141 | 41,541 |
| b Marketing/Advertising | 43b | 3,580 | 215 | 2,888 | 477 |
| c Contracts/Subcontracts | 43c | 7,789 | 7,789 | 0 | 0 |
| d Insurance | 43d | 8,407 | 3,304 | 5,103 | 0 |
| e Other | 43e | 2,800 | 1,313 | 1,487 | 0 |
| f Testing & Measurement | 43f | 9,736 | 9,484 | 252 | 0 |
| g | 43g | 0 | 0 | 0 | 0 |
| 44 **Total functional expenses.** Add lines 22a through 43g (Organizations completing columns (B)–(D), carry these totals to lines 13–15) | 44 | 2,938,126 | 1,746,472 | 1,010,389 | 181,265 |

**Joint Costs.** Check ▶☐ if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services? ▶☐ Yes ☒ No

If "Yes " enter (i) the aggregate amount of these joint costs $ N/A , (ii) the amount allocated to Program services $ N/A ; (iii) the amount allocated to Management and general $ N/A ; and (iv) the amount allocated to Fundraising $ N/A

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**Part III** **Statement of Program Service Accomplishments** *(See the instructions.)*

Form 990 is available for public inspection and for some people, serves as the primary or sole source of information about a particular organization How the public perceives an organization in such cases may be determined by the information presented on its return Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

| | Program Service Expenses (Required for 501(c)(3) and (4) orgs, and 4947(a)(1) trusts, but optional for others) |
|---|---|
| What is the organization's primary exempt purpose? ▶ Statement 5<br>All organizations must describe their exempt purpose achievements in a clear and concise manner State the number of clients served publications issued, etc Discuss achievements that are not measurable (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others ) | |
| a New Farm org: the website operating as a global resource for information on regenerative agriculture serving farmers, educators & agriculture entrepreneurs Daily advise, e-newsletter, online courses, farmer discussions, Farm Locator, success stories, Organic Price Index, guide to US organic certifiers, & research reports give visitors the resources they need. The site generated 800k visitors from over 199 countries<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 427,723 |
| b Research and Training:Expanded our research agenda to include cutting-edge new topics in response to the needs of farmers and agricultureeducators. Carried out an extensive outreach program including workshops & field days & custom programs for over 400 participants from 5 continents Research results were published in peer reviewed journals, fact sheets, brochures, & scientific reports.<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 518,625 |
| c Kidsregen org: The exciting Internet-based magazine for ages 7-13 with special sections for families & educators The site features age-appropriate, solution-oriented activities & info. based on nature & gardening that empowers kids to make healthy choices for themselves & the environment The site generated over 200k visitors from more than 172 countries<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 109,377 |
| d International. Provided applied research, training & education, communication & small enterprise development to organizations & individuals in Central America Africa, Europe & Asia on agricultural methods designed to provide solutions to soil improvement, community regeneration and natural resource managment solutions to hunger and malnutrition<br>(Grants and allocations $ ) If this amount includes foreign grants, check here ▶ ☐ | 150,889 |
| e Other program services (attach schedule) STATEMENT 6<br>(Grants and allocations $ 1,750 ) If this amount includes foreign grants, check here ▶ ☐ | 539,858 |
| f **Total of Program Service Expenses** (should equal line 44, column (B), Program services) ▶ | 1,746,472 |

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## Part IV Balance Sheets *(See the instructions.)*

| | | | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|---|---|
| | Note: | *Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.* | | | | | |
| Assets | 45 | Cash—non-interest-bearing | | | | 45 | |
| | 46 | Savings and temporary cash investments | | | 2,036,517 | 46 | 2,149,808 |
| | 47 a | Accounts receivable | 47a | 233,281 | | | |
| | b | Less: allowance for doubtful accounts | 47b | 1,000 | 6,306 | 47c | 232,281 |
| | 48 a | Pledges receivable | 48a | 16,731 | | | |
| | b | Less allowance for doubtful accounts | 48b | 0 | 46,472 | 48c | 16,731 |
| | 49 | Grants receivable | | | 227,131 | 49 | 160,158 |
| | 50 a | Receivables from current and former officers, directors, trustees, and key employees (attach schedule) | | | 0 | 50a | 0 |
| | b | Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) (attach schedule) | | | | 50b | |
| | 51 a | Other notes and loans receivable (attach schedule) STATEMENT 7 | 51a | 7,706,580 | | | |
| | b | Less: allowance for doubtful accounts | 51b | 0 | 7,706,580 | 51c | 7,706,580 |
| | 52 | Inventories for sale or use | | | 26,107 | 52 | 13,404 |
| | 53 | Prepaid expenses and deferred charges | | | 52,682 | 53 | 65,754 |
| | 54 a | Investments—publicly-traded securities STMT 8 ▶ ☐ Cost ☒ FMV | | | 1,914,979 | 54a | 1,968,250 |
| | b | Investments—other securities (attach schedule) ▶ ☐ Cost ☐ FMV | | | 0 | 54b | 0 |
| | 55 a | Investments—land, buildings and equipment: basis | 55a | 0 | | | |
| | b | Less: accumulated depreciation (attach schedule) | 55b | 0 | 0 | 55c | 0 |
| | 56 | Investments—other (attach schedule) | | | 0 | 56 | 0 |
| | 57 a | Land, buildings, and equipment: basis | 57a | 1,366,927 | | | |
| | b | Less: accumulated depreciation (attach schedule) STATEMENT 9 | 57b | 907,676 | 484,599 | 57c | 459,251 |
| | 58 | Other assets, including program-related investments (describe ▶ Charitable Remainder Trust Receivable ) | | | 19,612 | 58 | 20,820 |
| | 59 | **Total assets** (must equal line 74) Add lines 45 through 58 | | | 12,520,985 | 59 | 12,793,037 |
| Liabilities | 60 | Accounts payable and accrued expenses | | | 189,376 | 60 | 333,523 |
| | 61 | Grants payable | | | | 61 | |
| | 62 | Deferred revenue | | | 14,697 | 62 | 53,901 |
| | 63 | Loans from officers, directors, trustees, and key employees (attach schedule) | | | 0 | 63 | 0 |
| | 64 a | Tax-exempt bond liabilities (attach schedule) | | | 0 | 64a | 0 |
| | b | Mortgages and other notes payable (attach schedule) STATEMENT 10 | | | 0 | 64b | 0 |
| | 65 | Other liabilities (describe ▶ ) | | | 0 | 65 | 0 |
| | 66 | **Total liabilities.** Add lines 60 through 65 | | | 204,073 | 66 | 387,424 |
| Net Assets or Fund Balances | | **Organizations that follow SFAS 117, check here ▶ ☒ and complete lines 67 through 69 and lines 73 and 74** | | | | | |
| | 67 | Unrestricted | | | 11,490,432 | 67 | 11,585,520 |
| | 68 | Temporarily restricted | | | 34,918 | 68 | 27,531 |
| | 69 | Permanently restricted | | | 791,562 | 69 | 792,562 |
| | | **Organizations that do not follow SFAS 117, check here ▶ ☐ and complete lines 70 through 74** | | | | | |
| | 70 | Capital stock, trust principal, or current funds | | | | 70 | |
| | 71 | Paid-in or capital surplus, or land, building, and equipment fund | | | | 71 | |
| | 72 | Retained earnings, endowment, accumulated income, or other funds | | | | 72 | |
| | 73 | **Total net assets or fund balances** Add lines 67 through 69 or lines 70 through 72 (Column (A) must equal line 19 and column (B) must equal line 21) | | | 12,316,912 | 73 | 12,405,613 |
| | 74 | **Total liabilities and net assets/fund balances.** Add lines 66 and 73. | | | 12,520,985 | 74 | 12,793,037 |

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## Part IV-A Reconciliation of Revenue per Audited Financial Statements With Revenue per Return *(See the instructions.)*

| | | | | | |
|---|---|---|---|---|---|
| a | Total revenue, gains, and other support per audited financial statements | | | a | 3,122,175 |
| b | Amounts included on line a but not on Part I, line 12: | | | | |
| 1 | Net unrealized gains on investments | b1 | 75,889 | | |
| 2 | Donated services and use of facilities | b2 | 26,155 | | |
| 3 | Recoveries of prior year grants | b3 | | | |
| 4 | Other (specify): COGS | b4 | 69,193 | | |
| | Add lines b1 through b4 | | | b | 171,237 |
| c | Subtract line b from line a | | | c | 2,950,938 |
| d | Amounts included on Part I, line 12, but not on line a: | | | | |
| 1 | Investment expenses not included on Part I, line 6b | d1 | | | |
| 2 | Other (specify): | d2 | 0 | | |
| | Add lines d1 and d2 | | | d | 0 |
| e | **Total revenue** (Part I, line 12). Add lines **c** and **d** ▶ | | | e | 2,950,938 |

## Part IV-B Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

| | | | | | |
|---|---|---|---|---|---|
| a | Total expenses and losses per audited financial statements | | | a | 3,033,474 |
| b | Amounts included on line a but not on Part I, line 17: | | | | |
| 1 | Donated services and use of facilities | b1 | 26,155 | | |
| 2 | Prior year adjustments reported on Part I, line 20 | b2 | | | |
| 3 | Losses reported on Part I, line 20 | b3 | | | |
| 4 | Other (specify): COGS | b4 | 69,193 | | |
| | Add lines b1 through b4 | | | b | 95,348 |
| c | Subtract line b from line a | | | c | 2,938,126 |
| d | Amounts included on Part I, line 17, but not on line a: | | | | |
| 1 | Investment expenses not included on Part I, line 6b | d1 | | | |
| 2 | Other (specify): | d2 | 0 | | |
| | Add lines d1 and d2 | | | d | 0 |
| e | **Total expenses** (Part I, line 17). Add lines **c** and **d** ▶ | | | e | 2,938,126 |

## Part V-A Current Officers, Directors, Trustees, and Key Employees (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated.) *(See the instructions.)*

| (A) Name and address | (B) Title and average hours per week devoted to position | (C) Compensation (If not paid, enter -0-.) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| Name Statement 11 Str City ST ZIP | Title Hr/WK | 172,104 | 206,917 | 0 |
| Name N/A Str City ST ZIP | Title Hr/WK | | | |
| Name N/A Str City ST ZIP | Title Hr/WK | | | |
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| Name N/A Str City ST ZIP | Title Hr/WK | | | |
| Name N/A Str City ST ZIP | Title Hr/WK | | | |

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**Part V-A Current Officers, Directors, Trustees, and Key Employees** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| 75 a | Enter the total number of officers, directors, and trustees permitted to vote on organization business at board meetings ▶ 13 | | | |
| b | Are any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, related to each other through family or business relationships? If "Yes," attach a statement that identifies the individuals and explains the relationship(s) STMT 12 | 75b | X | |
| c | Do any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, receive compensation from any other organizations, whether tax exempt or taxable, that are related to the organization? See the instructions for the definition of "related organization" ▶ If "Yes," attach a statement that includes the information described in the instructions | 75c | | X |
| d | Does the organization have a written conflict of interest policy? | 75d | X | |

**Part V-B Former Officers, Directors, Trustees, and Key Employees That Received Compensation or Other Benefits** (If any former officer, director, trustee, or key employee received compensation or other benefits (described below) during the year, list that person below and enter the amount of compensation or other benefits in the appropriate column. See the instructions )

| (A) Name and address | (B) Loans and Advances | (C) Compensation (if not paid enter -0-) | (D) Contributions to employee benefit plans & deferred compensation plans | (E) Expense account and other allowances |
|---|---|---|---|---|
| Name Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |
| Name N/A Str<br>City ST ZIP | | | | |

**Part VI Other Information** *(See the instructions.)*

| | | | Yes | No |
|---|---|---|---|---|
| 76 | Did the organization make a change in its activities or methods of conducting activities? If "Yes," attach a detailed statement of each change | 76 | | X |
| 77 | Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes | 77 | | X |
| 78 a | Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return? | 78a | | X |
| b | If "Yes," has it filed a tax return on **Form 990-T** for this year? | 78b | N/A | |
| 79 | Was there a liquidation dissolution, termination, or substantial contraction during the year? If "Yes " attach a statement | 79 | | X |
| 80 a | Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc , to any other exempt or nonexempt organization? | 80a | | X |
| b | If "Yes," enter the name of the organization ▶ and check whether it is ☐ exempt or ☐ nonexempt | | | |
| 81 a | Enter direct and indirect political expenditures (See line 81 instructions ) 81a N/A | | | |
| b | Did the organization file **Form 1120-POL** for this year? | 81b | | X |

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## Part VI Other Information *(continued)*

| | | | | Yes | No |
|---|---|---|---|---|---|
| 82 a | Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value? | 82a | | X | |
| b | If "Yes," you may indicate the value of these items here Do not include this amount as revenue in Part I or as an expense in Part II (See instructions in Part III ) | 82b | 26,155 | | |
| 83 a | Did the organization comply with the public inspection requirements for returns and exemption applications? | 83a | | X | |
| b | Did the organization comply with the disclosure requirements relating to *quid pro quo* contributions? | 83b | | X | |
| 84 a | Did the organization solicit any contributions or gifts that were not tax deductible? | 84a | | | X |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible? | 84b | | N/A | |
| 85 | *501(c)(4), (5), or (6) organizations* a Were substantially all dues nondeductible by members? | 85a | | N/A | |
| b | Did the organization make only in-house lobbying expenditures of $2,000 or less? | 85b | | N/A | |
| | If "Yes" was answered to either 85a or 85b, **do not** complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year | | | | |
| c | Dues, assessments, and similar amounts from members | 85c | N/A | | |
| d | Section 162(e) lobbying and political expenditures | 85d | N/A | | |
| e | Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices | 85e | N/A | | |
| f | Taxable amount of lobbying and political expenditures (line 85d less 85e) | 85f | N/A | | |
| g | Does the organization elect to pay the section 6033(e) tax on the amount on line 85f? | 85g | | N/A | |
| h | If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year? | 85h | | N/A | |
| 86 | *501(c)(7) orgs* Enter: a Initiation fees and capital contributions included on line 12 | 86a | N/A | | |
| b | Gross receipts, included on line 12, for public use of club facilities | 86b | N/A | | |
| 87 | *501(c)(12) orgs* Enter: a Gross income from members or shareholders | 87a | N/A | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them ) | 87b | N/A | | |
| 88 a | At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? If "Yes," complete Part IX | 88a | | | X |
| b | At any time during the year, did the organization, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Part XI ▶ | 88b | | | X |
| 89 a | *501(c)(3) organizations* Enter: Amount of tax imposed on the organization during the year under: section 4911 ▶ NONE ; section 4912 ▶ NONE ; section 4955 ▶ NONE | | | | |
| b | *501(c)(3) and 501(c)(4) orgs* Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction | 89b | | | X |
| c | Enter: Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ NONE | | | | |
| d | Enter: Amount of tax on line 89c, above, reimbursed by the organization ▶ NONE | | | | |
| e | *All organizations* At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? | 89e | | | X |
| f | *All organizations* Did the organization acquire a direct or indirect interest in any applicable insurance contract? | 89f | | | X |
| g | *For supporting organizations and sponsoring organizations maintaining donor advised funds* Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year? | 89g | | N/A | |
| 90 a | List the states with which a copy of this return is filed ▶ Statement 13 | | | | |
| b | Number of employees employed in the pay period that includes March 12, 2006 (See instructions ) | 90b | 30 | | |
| 91 a | The books are in care of ▶ Name Jack McCue Telephone no ▶ 610-683-1400 Located at ▶ 611 Siegfriedale Rd City Kutztown ST PA ZIP + 4 ▶ 19530 | | | | |
| b | At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | 91b | | X | |
| | If "Yes," enter the name of the foreign country ▶ Senegal | | | | |
| | See the instructions for exceptions and filing requirements for **Form TD F 90-22.1**, Report of Foreign Bank and Financial Accounts. | | | | |

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**Part VI Other Information** *(continued)*

| | | | Yes | No |
|---|---|---|---|---|
| c | At any time during the calendar year, did the organization maintain an office outside of the United States? If "Yes," enter the name of the foreign country ▶ | 91c | | X |
| 92 | *Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of* **Form 1041**—Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the tax year . . ▶ 92 N/A | | | |

**Part VII Analysis of Income-Producing Activities** *(See the instructions.)*

ocked out

| **Note:** *Enter gross amounts unless otherwise indicated* | Unrelated business income (A) Business code | Unrelated business income (B) Amount | Excluded by section 512, 513, or 514 (C) Exclusion code | Excluded by section 512, 513, or 514 (D) Amount | (E) Related or exempt function income |
|---|---|---|---|---|---|
| 93 Program service revenue: | | | | | |
| a Technical/Consulting | | | | | 20,823 |
| b Education and Outreach | | | | | 11,928 |
| c Rental Income from Organic Farming | | | | | 5,850 |
| d | | | | | |
| e | | | | | |
| f Medicare/Medicaid payments | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 94 Membership dues and assessments | | | | | |
| 95 Interest on savings and temporary cash investments | | | 14 | 69,545 | |
| 96 Dividends and interest from securities | | | 14 | 51,669 | |
| 97 Net rental income or (loss) from real estate: | | | | | |
| a debt-financed property | | | | | |
| b not debt-financed property | | | | | |
| 98 Net rental income or (loss) from personal property | | | | | |
| 99 Other investment income | | | 14 | 897,943 | |
| 100 Gain or (loss) from sales of assets other than inventory | | | 18 | 2,673 | |
| 101 Net income or (loss) from special events | | | | | |
| 102 Gross profit or (loss) from sales of inventory | | | | | 63,984 |
| 103 Other revenue: a Exchange Rate Gain | | 0 | | 0 | 984 |
| b Miscellaneous Exp. Reimb. | | 0 | | 0 | 32,428 |
| c | | 0 | | 0 | 0 |
| d | | 0 | | 0 | 0 |
| e | | 0 | | 0 | 0 |
| 104 Subtotal (add columns (B), (D), and (E)) | | 0 | | 1,021,830 | 135,997 |
| 105 Total (add line 104, columns (B), (D), and (E)) ▶ | | | | | 1,157,827 |

olding case

**Note:** *Line 105 plus line 1e, Part I, should equal the amount on line 12, Part I.*

**Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes** *(See the instructions.)*

| Line No ▼ | Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes). |
|---|---|
| 93(a)-(c) and 102, 103 | All activities relate to the sale of educ. books, workshop registrations, technical services, and childrens educ. exhibit rental. They are important aspects of furthering public awareness of the main purpose of the Institute, which is the gathering of practical how-to information which is then provided to farmers, children, researchers, extensionists and policy-makers worldwide to regenerate human and environmental heath. |

**Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities** *(See the instructions.)*

| (A) Name, address, and EIN of corporation, partnership, or disregarded entity | (B) Percentage of ownership interest | (C) Nature of activities | (D) Total income | (E) End-of-year assets |
|---|---|---|---|---|
| N/A | % | | 0 | 0 |
| | % | | 0 | 0 |
| | % | | 0 | 0 |
| | % | | 0 | 0 |

**Part X Information Regarding Transfers Associated with Personal Benefit Contracts** *(See the instructions.)*

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

(b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

**Note:** *If "Yes" to (b), file Form 8870 and Form 4720 (see instructions).*

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**Part XI** **Information Regarding Transfers To and From Controlled Entities.** *Complete only if the organization is a controlling organization as defined in section 512(b)(13).*

| | | Yes | No |
|---|---|---|---|
| 106 | Did the reporting organization make any transfers to a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity | | X |

| | (A) Name, address, of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| a | | | | |
| b | | | | |
| c | | | | |
| Totals | | | | 0 |

| | | Yes | No |
|---|---|---|---|
| 107 | Did the reporting organization receive any transfers from a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity. | | X |

| | (A) Name, address, of each controlled entity | (B) Employer Identification Number | (C) Description of transfer | (D) Amount of transfer |
|---|---|---|---|---|
| a | | | | |
| b | | | | |
| c | | | | |
| Totals | | | | 0 |

| | | Yes | No |
|---|---|---|---|
| 108 | Did the organization have a binding written contract in effect on August 17 2006, covering the interest, rents, royalties, and annuities described in question 107 above? | | X |

**Please Sign Here**

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

John F McClure 1/18/08

Signature of officer Date

Type or print name and title

**Paid Preparer's Use Only**

| | | | |
|---|---|---|---|
| Preparer's signature | [signature] | Date 1/21/08 | Check if self-employed ☐ | Preparer's SSN or PTIN (See Gen Inst X) |
| Firm's name (or yours if self-employed), address, and ZIP + 4 | Ernst & Young U.S. LLP, One Renaissance Sq, 2 N Central, Phoenix, AZ 85004 | EIN 34-6565596 | Phone no 602-322-3000 | |

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

Department of the Treasury Internal Revenue Service

# Organization Exempt Under Section 501(c)(3)

(Except Private Foundation) and Section 501(e), 501(f), 501(k), 501(n), or 4947(a)(1) Nonexempt Charitable Trust

**Supplementary Information—(See separate instructions.)**

▶ MUST be completed by the above organizations and attached to their Form 990 or 990-EZ

OMB No 1545-0047

2006

Name of the organization: The Rodale Institute

Employer identification number: 23-7206884

**Part I** Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees (See page 2 of the instructions. List each one. If there are none, enter "None.")

| (a) Name and address of each employee paid more than $50 000 | (b) Title and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans & deferred compensation | (e) Expense account and other allowances |
|---|---|---|---|---|
| Paul Hepperly, 611 Siegfriedale Rd<br>Kutztown, PA 19530 | 40 | 114,565 | 11,199 | NONE |
| Jeff Moyer, 611 Siegfreidale Rd<br>Kutztown, PA 19530 | 40 | 98,352 | 18,470 | NONE |
| Amadou Diop, 611 Siegfreidale Rd<br>Kutztown, PA 19530 | 40 | 89,477 | 17,960 | NONE |
| Evelina Panayotova, 611 Siegfriedale Rd<br>Kutztown, PA 19530 | 40 | 77,704 | 17,070 | NONE |
| Greg Bowman, 611 Siegfriedale Rd<br>Kutztown, PA 19530 | 40 | 71,488 | 16,850 | NONE |
| Total number of other employees paid over $50,000 ▶ | 2 | | | |

**Part II-A** Compensation of the Five Highest Paid Independent Contractors for Professional Services (See page 2 of the instructions. List each one (whether individuals or firms). If there are none, enter "None.")

| (a) Name and address of each independent contractor paid more than $50,000 | (b) Type of service | (c) Compensation |
|---|---|---|
| William Klepeiss<br>3111 Sodl Lane, Whitehall, PA 18052 | IT/Project Management | 84,720 |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over $50,000 for professional services . . . . . . ▶ 0 | | |

**Part II-B** Compensation of the Five Highest Paid Independent Contractors for Other Services (List each contractor who performed services other than professional services, whether individuals or firms If there are none, enter "None." See page 2 of the instructions.)

| (a) Name and address of each independent contractor paid more than $50,000 | (b) Type of service | (c) Compensation |
|---|---|---|
| N/A | | |
| | | |
| | | |
| | | |
| | | |
| Total number of other contractors receiving over $50,000 for other services . . . . ▶ 0 | | |

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## Part III Statements About Activities (See page 2 of the instructions )

| | | | Yes | No |
|---|---|---|---|---|
| 1 | During the year has the organization attempted to influence national, state, or local legislation including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities ▶ $ 36,400 (Must equal amounts on line 38, Part VI-A or line i of Part VI-B ) | 1 | X | |
| | Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A Other organizations checking "Yes" must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities | | | |
| 2 | During the year has the organization either directly or indirectly engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families or with any taxable organization with which any such person is affiliated as an officer, director, trustee majority owner or principal beneficiary? *(If the answer to any question is "Yes " attach a detailed statement explaining the transactions )* | | | |
| a | Sale exchange or leasing of property? STATEMENT 14 | 2a | X | |
| b | Lending of money or other extension of credit? | 2b | | X |
| c | Furnishing of goods services, or facilities? STATEMENT 15 | 2c | X | |
| d | Payment of compensation (or payment or reimbursement of expenses if more than $1 000)? STATEMENT 16 | 2d | X | |
| e | Transfer of any part of its income or assets? | 2e | | X |
| 3 a | Did the organization make grants for scholarships, fellowships, student loans, etc ? (If "Yes," attach an explanation of how the organization determines that recipients qualify to receive payments ) | 3a | | X |
| b | Did the organization have a section 403(b) annuity plan for its employees? | 3b | X | |
| c | Did the organization receive or hold an easement for conservation purposes, including easements to preserve open space the environment historic land areas or historic structures? If "Yes," attach a detailed statement | 3c | | X |
| d | Did the organization provide credit counseling, debt management credit repair or debt negotiation services? | 3d | | X |
| 4 a | Did the organization maintain any donor advised funds? If "Yes " complete lines 4b through 4g If "No " complete lines 4f and 4g | 4a | | X |
| b | Did the organization make any taxable distributions under section 4966? | 4b | | X |
| c | Did the organization make a distribution to a donor, donor advisor or related person? | 4c | | X |
| d | Enter the total number of donor advised funds owned at the end of the tax year ▶ | N/A | | |
| e | Enter the aggregate value of assets held in all donor advised funds owned at the end of the tax year ▶ | N/A | | |
| f | Enter the total number of separate funds or accounts owned at the end of the tax year (excluding donor advised funds included on line 4d) where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts ▶ | N/A | | |
| g | Enter the aggregate value of assets held in all funds or accounts included on line 4f at the end of the tax year ▶ | N/A | | |

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## Part IV Reason for Non-Private Foundation Status (See pages 4 through 7 of the instructions )

I certify that the organization is not a private foundation because it is: (Please check only ONE applicable box )

5 [ ] A church, convention of churches or association of churches Section 170(b)(1)(A)(i)

6 [ ] A school Section 170(b)(1)(A)(ii) (Also complete Part V )

7 [ ] A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)

8 [ ] A Federal state, or local government or governmental unit Section 170(b)(1)(A)(v)

9 [ ] A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii) **Enter the hospital's name, city, and state** ▶ ______ City ______ ST ______ Country ______

10 [ ] An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the **Support Schedule** in Part IV-A )

11 a [X] An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A )

11 b [ ] A community trust Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A )

12 [ ] 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 charitable, etc , 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) (Also complete the **Support Schedule** in Part IV-A )

13 [ ] An organization that is not controlled by any disqualified persons (other than foundation managers) and otherwise meets the requirements of section 509(a)(3) Check the box that describes the type of supporting organization:

[ ] Type I [ ] Type II [ ] Type III-Functionally Integrated [ ] Type III-Other

**Provide the following information about the supported organizations.** (See page 7 of the instructions.)

| (a) Name(s) of supported organization(s) | (b) Employer identification number (EIN) | (c) Type of organization (described in lines 5 through 12 above or IRC section) | (d) Is the supported organization listed in the supporting organization's governing documents? | | (e) Amount of support |
|---|---|---|---|---|---|
| | | | Yes | No | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| **Total** ▶ | | | | | 0 |

14 [ ] An organization organized and operated to test for public safety Section 509(a)(4) (See page 7 of the instructions )

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**Part IV-A Support Schedule** (Complete only if you checked a box on line 10, 11, or 12 ) *Use cash method of accounting.*

**Note:** *You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting.*

| | Calendar year (or fiscal year beginning in) ▶ | (a) 2005 | (b) 2004 | (c) 2003 | (d) 2002 | (e) Total |
|---|---|---|---|---|---|---|
| 15 | Gifts grants, and contributions received (Do not include unusual grants. See line 28 ) | 2,620,032 | 3,107,900 | 2,796,111 | 3,454,367 | 11,978,410 |
| 16 | Membership fees received | | | | | 0 |
| 17 | Gross receipts from admissions merchandise sold or services performed or furnishing of facilities in any activity that is related to the organization's charitable, etc , purpose | 165,991 | 214,569 | 199,965 | 456,416 | 1,036,941 |
| 18 | Gross income from interest dividends, amounts received from payments on securities loans (section 512(a)(5)) rents, royalties and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975 | 1,009,728 | 979,187 | 993,392 | 1,011,066 | 3,993,373 |
| 19 | Net income from unrelated business activities not included in line 18 | | | | | 0 |
| 20 | Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf | | | | | 0 |
| 21 | The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge | | | | | 0 |
| 22 | Other income Attach a schedule Do not include gain or (loss) from sale of capital assets | STATEMENT 17<br>61,962 | 67,249 | 23,903 | 32,272 | 185,386 |
| 23 | Total of lines 15 through 22 | 3,857,713 | 4,368,905 | 4,013,371 | 4,954,121 | 17,194,110 |
| 24 | Line 23 minus line 17 | 3,691,722 | 4,154,336 | 3,813,406 | 4,497,705 | 16,157,169 |
| 25 | Enter 1% of line 23 | 38,577 | 43,689 | 40,134 | 49,541 | |

26 **Organizations described on lines 10 or 11:** a Enter 2% of amount in column (e) line 24 ▶ 26a 323,143

b Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 2002 through 2005 exceeded the amount shown in line 26a **Do not file this list with your return** Enter the total of all these excess amounts ▶ 26b 3,151,952

c Total support for section 509(a)(1) test: Enter line 24, column (e) ▶ 26c 16,157,169

d Add: Amounts from column (e) for lines 18 3,993,373 19 ______ 22 185,386 26b 3,151,952 ▶ 26d 7,330,711

e Public support (line 26c minus line 26d total) ▶ 26e 8,826,458

f **Public support percentage (line 26e (numerator) divided by line 26c (denominator))** ▶ 26f 54.63%

27 **Organizations described on line 12:** a For amounts included in lines 15, 16, and 17 that were received from a "disqualified person" prepare a list for your records to show the name of and total amounts received in each year from each "disqualified person" **Do not file this list with your return** Enter the sum of such amounts for each year:

(2005) ______ (2004) ______ (2003) ______ (2002) ______

b For any amount included in line 17 that was received from each person (other than "disqualified persons"), prepare a list for your records to show the name of, and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) $5 000 (Include in the list organizations described in lines 5 through 11b as well as individuals ) **Do not file this list with your return** After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year:

(2005) ______ (2004) ______ (2003) ______ (2002) ______

c Add Amounts from column (e) for lines: 15 ______ 16 ______ 17 ______ 20 ______ 21 ______ ▶ 27c 0

d Add Line 27a total ______ and line 27b total ______ ▶ 27d 0

e Public support (line 27c total minus line 27d total) ▶ 27e 0

f Total support for section 509(a)(2) test: Enter amount from line 23, column (e) ▶ 27f

g **Public support percentage (line 27e (numerator) divided by line 27f (denominator))** ▶ 27g 0.00%

h **Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))** ▶ 27h 0 00%

28 Unusual Grants: For an organization described in line 10, 11, or 12 that received any unusual grants during 2002 through 2005, prepare a list for your records to show, for each year, the name of the contributor, the date and amount of the grant and a brief description of the nature of the grant **Do not file this list with your return** Do not include these grants in line 15

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**Part V** **Private School Questionnaire** (See page 9 of the instructions.)
**(To be completed ONLY by schools that checked the box on line 6 in Part IV)** N/A

| | | | Yes | No |
|---|---|---|---|---|
| 29 | Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws other governing instrument or in a resolution of its governing body? | 29 | | |
| 30 | Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues and other written communications with the public dealing with student admissions, programs, and scholarships? | 30 | | |
| 31 | Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program in a way that makes the policy known to all parts of the general community it serves? | 31 | | |
| | If "Yes" please describe; if "No," please explain (If you need more space attach a separate statement ) | | | |
| 32 | Does the organization maintain the following: | | | |
| a | Records indicating the racial composition of the student body faculty and administrative staff? | 32a | | |
| b | Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis? | 32b | | |
| c | Copies of all catalogues brochures, announcements and other written communications to the public dealing with student admissions programs and scholarships? | 32c | | |
| d | Copies of all material used by the organization or on its behalf to solicit contributions? | 32d | | |
| | If you answered "No" to any of the above, please explain (If you need more space, attach a separate statement ) | | | |
| 33 | Does the organization discriminate by race in any way with respect to: | | | |
| a | Students' rights or privileges? | 33a | | |
| b | Admissions policies? | 33b | | |
| c | Employment of faculty or administrative staff? | 33c | | |
| d | Scholarships or other financial assistance? | 33d | | |
| e | Educational policies? | 33e | | |
| f | Use of facilities? | 33f | | |
| g | Athletic programs? | 33g | | |
| h | Other extracurricular activities? | 33h | | |
| | If you answered "Yes" to any of the above, please explain (If you need more space, attach a separate statement ) | | | |
| 34 a | Does the organization receive any financial aid or assistance from a governmental agency? | 34a | | |
| b | Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b please explain using an attached statement | 34b | | |
| 35 | Does the organization certify that it has complied with the applicable requirements of sections 4 01 through 4 05 of Rev Proc 75-50, 1975-2 C B. 587, covering racial nondiscrimination? If "No," attach an explanation | 35 | | |

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**Part VI-A** **Lobbying Expenditures by Electing Public Charities** (See page 10 of the instructions )
(To be completed ONLY by an eligible organization that filed Form 5768)

Check ▶ a ☐ if the organization belongs to an affiliated group Check ▶ b ☐ if you checked "a" and limited control" provisions apply

| | **Limits on Lobbying Expenditures** (The term "expenditures" means amounts paid or incurred.) | | (a) Affiliated group totals | (b) To be completed for all electing organizations |
|---|---|---|---|---|
| 36 | Total lobbying expenditures to influence public opinion (grassroots lobbying) | 36 | | |
| 37 | Total lobbying expenditures to influence a legislative body (direct lobbying) | 37 | | 36,400 |
| 38 | Total lobbying expenditures (add lines 36 and 37) | 38 | 0 | 36,400 |
| 39 | Other exempt purpose expenditures | 39 | | 2,901,726 |
| 40 | Total exempt purpose expenditures (add lines 38 and 39) | 40 | 0 | 2,938,126 |
| 41 | Lobbying nontaxable amount Enter the amount from the following table—<br>**If the amount on line 40 is— The lobbying nontaxable amount is—**<br>Not over $500 000 — 20% of the amount on line 40<br>Over $500,000 but not over $1,000 000 — $100 000 plus 15% of the excess over $500,000<br>Over $1 000 000 but not over $1 500 000 — $175,000 plus 10% of the excess over $1 000,000<br>Over $1 500 000 but not over $17,000,000 — $225,000 plus 5% of the excess over $1,500 000<br>Over $17 000 000 — $1,000 000 | 41 | | 296,906 |
| 42 | Grassroots nontaxable amount (enter 25% of line 41) | 42 | 0 | 74,227 |
| 43 | Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36 | 43 | 0 | 0 |
| 44 | Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38 | 44 | 0 | 0 |

Caution: *If there is an amount on either line 43 or line 44, you must file Form 4720*

## 4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below See the instructions for lines 45 through 50 on page 13 of the instructions.)

| | | Lobbying Expenditures During 4-Year Averaging Period | | | | |
|---|---|---|---|---|---|---|
| | Calendar year (or fiscal year beginning in) ▶ | (a) 2006 | (b) 2005 | (c) 2004 | (d) 2003 | (e) Total |
| 45 | Lobbying nontaxable amount | 296,906 | 325,246 | 368,150 | 350,557 | 1,340,859 |
| 46 | Lobbying ceiling amount (150% of line 45(e)) | | | | | 2,011,289 |
| 47 | Total lobbying expenditures | 36,400 | 62,443 | 88,118 | 46,412 | 233,373 |
| 48 | Grassroots nontaxable amount | 74,227 | 81,312 | 92,038 | 87,639 | 335,216 |
| 49 | Grassroots ceiling amount (150% of line 48(e)) | | | | | 502,824 |
| 50 | Grassroots lobbying expenditures | NONE | 2,114 | 2,587 | 1,142 | 5,843 |

**Part VI-B** **Lobbying Activity by Nonelecting Public Charities**
(For reporting only by organizations that did not complete Part VI-A) (See page 13 of the instructions ) N/A

| During the year did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of | Yes | No | Amount |
|---|---|---|---|
| a Volunteers | | | |
| b Paid staff or management (Include compensation in expenses reported on lines c through h ) | | | |
| c Media advertisements | | | |
| d Mailings to members legislators or the public | | | |
| e Publications or published or broadcast statements | | | |
| f Grants to other organizations for lobbying purposes | | | |
| g Direct contact with legislators, their staffs, government officials or a legislative body | | | |
| h Rallies, demonstrations seminars conventions speeches lectures or any other means | | | |
| i Total lobbying expenditures (Add lines c through h ) | | | 0 |

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities

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**Part VII** **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations** (See page 13 of the instructions.)

51 Did the reporting organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

| | | Yes | No |
|---|---|---|---|
| a Transfers from the reporting organization to a noncharitable exempt organization of | | | |
| (i) Cash | 51a(i) | | X |
| (ii) Other assets | a(ii) | | X |
| b Other transactions | | | |
| (i) Sales or exchanges of assets with a noncharitable exempt organization | b(i) | | X |
| (ii) Purchases of assets from a noncharitable exempt organization | b(ii) | | X |
| (iii) Rental of facilities, equipment or other assets | b(iii) | | X |
| (iv) Reimbursement arrangements | b(iv) | | X |
| (v) Loans or loan guarantees | b(v) | | X |
| (vi) Performance of services or membership or fundraising solicitations | b(vi) | | X |
| c Sharing of facilities equipment mailing lists other assets, or paid employees | c | | X |

d If the answer to any of the above is "Yes" complete the following schedule Column (b) should always show the fair market value of the goods, other assets or services given by the reporting organization If the organization received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received·

| (a) Line no | (b) Amount involved | (c) Name of noncharitable exempt organization | (d) Description of transfers, transactions, and sharing arrangements |
|---|---|---|---|
| | N/A | | |

52 a Is the organization directly or indirectly affiliated with or related to one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ▶ ☐ Yes ☒ No

b If "Yes," complete the following schedule:

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

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PART I, LINE 8(d) NET GAIN FROM SALE OF ASSETS

8(A) SECURITIES

| DESCRIPTION | SALES PRICE | BROKER FEE | COST | LOSS |
|---|---|---|---|---|
| Publicly traded securities | 68.042 | 0 | 67,998 | 44 |
| | 68,042 | 0 | 67,998 | 44 |

8(B) FIXED ASSETS

| DESCRIPTION | DATE ACQUIRED | DATE SOLD | GROSS SALES PRICE | COST | DEPRECIATION SINCE ACQUISITION | GAIN |
|---|---|---|---|---|---|---|
| 93 Pickup Truck-Senegal | 5/27/1993 | 10/1/2006 | $1,533 | $29 520 | $29 520 | $1,533 |
| Motorcycle-Senegal | | 6/23/2006 | $724 | $0 | $0 | $724 |
| Computer-Senegal | | 3/1/2006 | $372 | $0 | $0 | $372 |
| | | | $2,629 | $29,520 | $29,520 | $2,629 |

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PART I, LINE 10 GROSS PROFIT/LOSS FROM SALES OF INVENTORY

| | |
|---|---|
| Bookstore/Catalog Gross Sales | 65,914 |
| Organic Grain and Organic Vegetable Sales | 67,263 |
| Gross Sales of Inventory | 133,177 |
| | |
| Less: Cost of Goods Sold | |
| Inventory | 32,995 |
| Organic Grain Purchased from farmer for resale | 22,230 |
| Direct and indirect labor, materials and supplies consumed in the production of produce for resale | 2,079 |
| Freight In | 416 |
| Inventory Write Off | 11,473 |
| Cost of Goods Sold | 69,193 |
| | |
| Gross profit from sales of inventory | 63,984 |

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| PART 1, LINE 20 | OTHER CHANGES IN NET ASSETS OR FUND BALANCES |
|---|---|
| Net Unrealized Appreciation on Investments | $75,889 |
| TOTAL | $75,889 |

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PART II, LINE 22

GRANTS AND ALLOCATIONS

| Name & Address of Recipient | Amount Received | Relationship of Individual to Any Person or Corporation with an Interest in the Organization | Purpose of Grant |
|---|---|---|---|
| The David Porter School<br>41-77 Little Neck Parkeway<br>Little Neck, NY 11363 | 1,000 | NONE | Garden Supplies |
| Novato Charter School<br>940 C Street<br>Novato, CA 94949 | 500 | NONE | Garden Supplies |
| Glade Run Foundation<br>P O box 70<br>Zelienpole, PA 16063 | 250 | NONE | Garden Supplies |
| Total Amount Received | $1,750 | | |

Statement #4

**RODALE INSTITUTE**
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**Part III** **What is the organization's primary exempt purpose?**

The Rodale Institute® works with people worldwide to achieve a regenerative food system that renews environmental and human health. Our commitment to research is the backbone of our mission, and our research has helped support the movement for national education and research on organic agriculture and food. We are engaged in promoting and taking the message of organic and regenerative agriculture to farmers, agricultural researchers, policy makers, and the general public in the U S and worldwide We also recognize children as the earth's future decision makers, and our www.kidsregen.org website provides factual, fun, and useful information to empower kids, parents, and educators to make healthy choices

**RODALE INSTITUTE**
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**Part III, Line 44(e)** **Statement of Program Service Accomplishments**

(5)**New Farm Operations:** Maintained organic certification, worked on educational activities, developed our own role as a marketer or organic crops and processed products. Continued to improve our research and training capacities through facilities development Acts as a resource to advise & implement practical solutions to technical challenges Use collaboration and support for research on the No-Till Plus project

$415,314

(6) **Marketing Services:** Gathered and processed a total of 320 media outlets spreading The Rodale Institute's message of Healthy Soil, Healthy Food, Healthy People® with a circulation to gear toward 14 million readers. Major topics included news about FST (Farming Systems Trial), No-Till Plus, and the School Garden Awards, publications in renowned newspapers and magazines like The New York Times, The Philadelphia Inquirer, USA Today, and a special showing about our internship program at the NBC's Today Show

$124,544

**Total:** **$539,858**

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PART IV, LINE 51(c) DETAIL OF OTHER NOTES AND LOANS RECEIVABLE

NOTE 1

| | |
|---|---|
| Borrower's Name: | Rodale, Inc |
| Original Amount | $2,061,160 |
| Balance Due: | $1,030,580 |
| Date of Note: | January 1991 |
| Date of Maturity: | March 31, 2006 |
| Repayment Terms | 10 Annual installments of $103,058 with remaining principal due March 31, 2006 |
| Interest Rate: | 12% |
| Security: | None |
| Special Note: | This note was refinanced as of March 31, 2006, See Note 1 |
| Purpose of Loan. | Consideration for Repurchase of Preferred Stock<br>Of Rodale, Inc |

NOTE 1A

| | |
|---|---|
| Borrower's Name. | Rodale, Inc |
| Original Amount: | $1,030,580 |
| Balance Due: | $1,030,580 |
| Date of Note: | January 1991 |
| Date of Maturity: | March 31, 2011 |
| Repayment Terms | Quarterly payment of interest with principal balloon payment at end of term |
| Interest Rate: | higher of the prime rate or 7% |
| Security. | None |
| Purpose of Loan. | Refinance consideration<br>Of Rodale, Inc |

NOTE 2

| | |
|---|---|
| Borrower's Name: | Rodale, Inc |
| Original Amount: | $7,100,000 |
| Balance Due | $6,676,000 |
| Date of Note: | January 1991 |
| Date of Maturity: | February 1, 2011 |
| Repayment Terms: | Quarterly payment of interest with principal balloon payment at end of term<br>balloon payment |
| Interest Rate: | 12% |
| Security: | None |
| Purpose of Loan: | Future support commitment |
| TOTAL | $7,706,580 |

Statement #7

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PART IV, LINE 54 INVESTMENTS-SECURITIES

| DESCRIPTION | |
|---|---|
| Certificate of Deposit | 113,940 |
| Common Stock | 1,747,403 |
| Money Market Fund | 106,907 |
| | 1,968,250 |

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PART IV, LINE 57(a) LAND, BUILDINGS, AND EQUIPMENT

| ASSET BASIS | BALANCE 12/31/2005 | ADDITIONS | DELETIONS | BALANCE 12/31/2006 |
|---|---|---|---|---|
| Land | 254,726 | 0 | | 254,726 |
| Pond | 34,421 | 0 | | 34,421 |
| Land Improvement- Paving | 30,858 | | | 30,858 |
| Office Equipment and Computers | 227,871 | 61,522 | 35,826 | 253,567 |
| Machinery and Farm Equipment | 559,702 | 0 | | 559,702 |
| Buildings | 73,119 | 0 | | 73,119 |
| Vehicles | 160,534 | 0 | | 160,534 |
| Total | 1,341,231 | 61,522 | 35,826 | 1,366,927 |

PART IV, LINE 57(b)

| ACCUMULATED DEPRECIATION | BALANCE 12/31/2005 | ADDITIONS | DELETIONS | BALANCE 12/31/2006 |
|---|---|---|---|---|
| Land Improvements | 21,121 | 3,778 | | 24,899 |
| Office Equipment and Computers | 198,000 | 11,293 | 6,306 | 202,987 |
| Machinery and Farm Equipment | 491,146 | 43,580 | | 534,726 |
| Buildings | 35,568 | 8,098 | | 43,666 |
| Vehicles | 110,797 | 20,121 | 29,520 | 101,398 |
| Total | 856,632 | 86,870 | 35,826 | 907,676 |
| NET TOTAL | 484,599 | | | 459,251 |

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PART IV, LINE 64 MORTGAGES AND OTHER NOTES PAYABLE

| | |
|---|---|
| TITLE OR IDENTIFICATION OF NOTE: | LINE OF CREDIT |
| Name of Lender: | M&T Bank |
| Original Amount. | $250,000 |
| Balance Due: | $0 |
| Original Date of Note: | 1991 |
| Date of Maturity: | None, but is reviewed annually for renewal |
| Interest Rate: | Prime Plus 1/4%, 8 5% as of December 31, 2006 |
| Security Provided by Borrower: | None, but is reviewed annually for renewal |
| Purpose of Loan: | General Purpose |
| Consideration Furnished by Lender: | Cash and Cash Equivalent of $250,000 |

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SUPPORT SCHEDULE
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PART V - LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

| NAME AND ADDRESS | TITLE | AVERAGE HOURS | COMPENSATION | BENEFIT PLANS | EXPENSE ACCT |
|---|---|---|---|---|---|
| PAUL MCGINLEY<br>THE RODALE INSTITUTE<br>GROSS, MCGINLEY LABARRE & EATON<br>33 S SEVENTH ST.<br>ALLENTOWN, PA 18105 | CO-CHAIRMAN | 1 | 0 | 0 | 0 |
| ARDATH RODALE<br>RODALE INC. CHAIRMAN<br>33 E MINOR ST<br>EMMAUS, PA 18049 | CO-CHAIRMAN | 1 | 0 | 0 | 0 |
| ANTHONY RODALE<br>RODALE INC<br>SOUTH MOUNTAIN CENTER<br>400 SOUTH 10TH ST<br>EMMAUS, PA 18098 | CHAIRMAN EMERITUS | 1 | 0 | 0 | 0 |
| JOHN HABERERN<br>THE RODALE INSTITUTE<br>611 SEIGFRIEDALE RD<br>KUTZTOWN, PA 19530 | PRESIDENT | 1 | 0 | 0 | 0 |
| TAMMY FOLK<br>THE RODALE INSTITUTE<br>611 SEIGFRIEDALE RD<br>KUTZTOWN, PA 19530 | CHIEF FIN.OFFICER<br>Intenm Treasurer to Board | 40 | 155,810 | 206,861 | 0 |
| JOHN MCCUE<br>THE RODALE INSTITUTE<br>611 SEIGFRIEDALE RD<br>KUTZTOWN, PA 19530 | CHIEF ADMINISTRATION OFFICER | 40 | 16,294 | 56 | 0 |
| TIM LANG<br>ST MARY'S ROAD<br>EALING, LONDON W5 5RF | DIRECTOR | 1 | 0 | 0 | 0 |
| DR. GEORGE BIRD<br>NATIONAL SCIENCE BLDG<br>DEPT OF ENTEMOLOGY, RM 243<br>EAST LANSING, MI 48824 | DIRECTOR | 1 | 0 | 0 | 0 |

RODALE INSTITUTE 23-7206884 AS AMENDED JANUARY 2008
SUPPORT SCHEDULE
FORM 990, 2006

PART V - LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

| NAME AND ADDRESS | | TITLE AND AVERAGE HOURS | COMPENSATION | BENEFIT PLANS | EXPENSE ACCT. |
|---|---|---|---|---|---|
| JOSEPH MCMAHON<br>1924 N STREET<br>WASHINGTON, DC 20036 | DIRECTOR | 1 | 0 | 0 | 0 |
| LORNA DONALDSON<br>DONALDSON FARMS<br>PO BOX 224<br>TIPTONVILLE, TN 38079 | DIRECTOR | 1 | 0 | 0 | 0 |
| W CLINTON PETTUS<br>302 WADE WILSON BUILDING<br>CHEYNEY, PA 19319 | DIRECTOR | 1 | 0 | 0 | 0 |
| DR. TED ALTER<br>24 HOLLY CIRCLE<br>STATE COLLEGE, PA 16801 | DIRECTOR | 1 | 0 | 0 | 0 |
| CYNTHIA DOBSON<br>RODALE INC.<br>33 EAST MINOR STREET<br>EMMAUS, PA 18098 | SECRETARY | 1 | 0 | 0 | 0 |
| CHRISTIANE BAKER<br>21 MONTGOMERY PLACE<br>BROOKLYN, NY 11215 | DIRECTOR | 1 | 0 | 0 | 0 |
| HELEN PISZEK NELSON<br>PO BOX 385<br>FORT WASHINGTON, PA 19034 | DIRECTOR | 1 | 0 | 0 | 0 |
| LOUISE SCHORN SMITH<br>461 WHARTON BOULEVARD<br>EXTON, PA 19341 | DIRECTOR | 1 | 0 | 0 | 0 |
| | | TOTAL | 172,104<br>====== | 206,917<br>====== | 0 |

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Part V-A, 75b

RELATIONS THROUGH FAMILY OR BUSINESS

OFFICERS AND DIRECTORS.

Ardath Rodale
Chairman of Rodale Inc /Co-Chairman of The Rodale Institute
Mother of Anthony Rodale

Anthony Rodale
Board member of Rodale Inc /Chairman Emeritus of The Rodale Institute
Son of Ardath Rodale

John Haberern
Employee (Senior Vice President) of Rodale Inc /President of Rodale Institute
All compensation paid through Rodale Inc

Paul McGinley
Partner, Gross, McGinley, LaBarre and Eaton LLP
Provides General Counsel to Rodale Inc and legal services to The Rodale Institute
Compensated by Rodale Inc

Joseph McMahon
McMahon and Associates
Provides consulting services to Rodale Inc
Compensated by Rodale Inc

Ted Alter
Employee of Penn State University

George Bird
Employee of Michigan State University
Professional affiliations with United States Department of Agriculture,
United Stated Department of Environmental Protection

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Rodale Institute
EIN #23-7206884

| State | Status | Registering Agency | Registration Number | Initial Registration Date |
|---|---|---|---|---|
| AL | Registered | State of Alabama<br>Office of the Attorney General<br>Consumer Affairs | AL00-281 | 6/29/2000 |
| AK | Registered | State of Alaska<br>Department of Law<br>Office of the Attorney General | | 9/1/1996 |
| AZ | Registered | Office of the Secretary of State<br>Charitable Solicitation<br>Public Services Department | | 1996 |
| AR | Registered | State of Arkansas<br>Office of the Attorney General<br>Consumer Protection Division | | 1996 |
| CA | Registered | State of California<br>Department of Justice<br>Registry of Charitable Trusts | Q2658 | 1996 |
| CO | Registered | State of Colorodo<br>Secretary of State | 20053001998 | 2/18/2005 |
| CT | Registered | State of Connecticut<br>Department of Consumer Protection<br>Public Charities Unit | 7222-05357 | 1996 |
| DC | Registered | District of Columbia<br>Dept. of Consumer and Regulatory Affairs | 23720XXX-64004351 | 12/3/2004 |
| FL | Registered | Florida Dept of Agric And Cons Services<br>Division of Consumer Services | SC-07124/CMC | 1996 |
| GA | Registered | Secretary of State - Georgia<br>Securities and Business Regulation | 01-911737 | 1991 |
| HI | Exempt | Registration Form was returned-<br>Hawii has done away w/ reg. requirements | | |
| IL | Registered | Office of the Attorney General<br>State of Illinois<br>Charitable Turst and Solicitations Bureau | 01-030,086 | 1996 |
| KS | Registered | State of Kansas<br>Office of the Secretary of State | 238-262-0 SO | 1996 |
| KY | Registered | Office of Attorney General<br>Consumer Protection Division | 1546 | 1997 |
| LA | Exempt | Dept of Justice<br>Public Protection Div. | | |
| MD | Registered | Office of the Secretary of State<br>Charitable Organizations Division | 5113 | 1985 |
| MA | Registered | MA Office of the Attorney General<br>Division of Public Charities | 20622 | 1986 |
| ME | Registered | Office of Licensing and Registration<br>Char. Solicitations Registration | CO2919 | 1999 |
| MI | Registered | State of Michigan<br>Department of Attorney General<br>Charitable Trust Section | MICS9729 | 1985 |
| MO | Exempt | Missouri Attorney General<br>Char. Solicitations Registration | | |
| MN | Registered | State of Minnesota<br>Office of the Attorney General<br>Business Regulation Section | | 1989 |
| MS | Registered | Mississippi Secretary of State<br>Charlties Registation | C-0914 | 1996 |
| NC | Registered | North Carolina Department of Sec Of State<br>Charitable Solicitation | SL000520 | 1984 |
| NE | Registered | State of Nebraska | | 1996 |

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| State | Status | Registering Agency | Registration Number | Initial Registration Date |
|---|---|---|---|---|
| | | Secretary of State | | |
| ND | Registered | Secretary of State<br>State of North Dakota | 3973 | 11/14/2000 |
| NH | Registered | The State of New Hampshire<br>Department of Justice<br>Charitable Trust Division | 5964-05964 | 1996 |
| NJ | Registered | State of New Jersey<br>Department of Law & Public Safety<br>Division of Consumer Affairs<br>Office of Consumer Protection<br>Charities Registation | CH0915100 | 1996 |
| NM | Registered | Attorney General of New Mexico<br>Consumer Protection Division<br>New Mexico Registrar of Charitable Org. | | 1996 |
| NY | Registered | New York State Department of State<br>Office of Charities Registration | | 1983 |
| OH | Registered | Office of the Attorney General<br>Charitable Law Section | 0175-18 | 1996 |
| OK | Registered | Secretary of State | | 1996 |
| OR | Registered | Department of Justice<br>Charities Activities Section | 21990 | 1996 |
| PA | Registered | Commonwealth of PA<br>Department of State<br>Bureau of Charitble Organizations | 3187 | 1982 |
| RI | Registered | Department of Business Regulation<br>Securities Division | | 1996 |
| SC | Registered | State of South Carolina<br>Office of the Secretary of State<br>Division of Public Charities | | 1995 |
| TN | Registered | State of Tennesee<br>Department of State<br>Division of Charitable Solicitations | 2888 | 1996 |
| UT | Registered | State of Utah<br>Department of Commerce<br>Division of Consumer Potection | C1400 | 1996 |
| VA | Registered | Commonwealth of Virginia<br>Department of Ag & Consumer Affairs<br>Division of Consumer Protection | | 1984 |
| WA | Registered | Secretary of State<br>Charitable Solicitations | R01-N96-250<br>4013 | 1996 |
| WV | Registered | State of West Virginia<br>Secretary of State | | 12/28/1989 |
| WI | Registered | State of Wisconsin<br>Department of Regulation & Licensing | 0001102 | 1984 |

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Schedule A, Part III 2a SALE, EXCHANGE, OR LEASING OF PROPERTY

The following board members are also on the Rodale Inc board Ardath Rodale and Anthony Rodale

The Rodale Institute is not a related organization by the 50% board overlap rule and ownership

The Rodale Institute leases office space from Rodale Inc at $833 per month conducted at FMV

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SCHEDULE A, PART III, LINE 2c

FURNISHING OF GOODS, SERVICES, OR FACILITIES TO OFFICERS, DIRECTORS, TRUSTEES, KEY EMPLOYEES, MEMBERS OF THEIR FAMILIES, AND TAXABLE ORGANIZATIONS

The Institute paid Rodale, Inc $2,864 for educational books for resale at The Rodale Institute Bookstore/Café The following officers are board members of both the Institute and Rodale, Inc· Ardath Rodale and Anthony Rodale

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Schedule A, Part III, 2d

PAYMENT OF COMPENSATION TO OFFICERS, DIRECTORS, TRUSTEES, KEY EMPLOYEES, MEMBERS OF THEIR FAMILIES, AND TAXABLE ORGANIZATIONS

| | COMPENSATION | BENEFIT PLANS |
|---|---|---|
| Tammy Folk, CFO, Vice President | $336,417 | $15,571 |
| John McCue, CAO | $16,294 | $56 |

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SCHEDULE A, PART IV-A, LINE 22 - OTHER INCOME

| Description | 2005 | 2004 | 2003 | 2002 |
|---|---|---|---|---|
| Extraordinary Gain | | | | |
| Rental Income | 4,250 | 4,250 | 4,410 | 5,000 |
| Miscellaneous Income | 30,365 | 4,904 | 3,661 | 5,912 |
| Miscellaneous Expense Reimbursements | 35,177 | 50,201 | 9,281 | 14,163 |
| Exchange Rate Gain/(Loss) | -7,830 | 7,894 | 6,551 | 7,197 |
| | 61,962 | 67,249 | 23,903 | 32,272 |