

Form **990**

RETURN EXTENDED UNTIL AUGUST 15, 2016

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

OMB No. 1545-0047

2014

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Do not enter social security numbers on this form as it may be made public.

Information about Form 990 and its instructions is at www.irs.gov/form990.A For the 2014 calendar year, or tax year beginning **OCT 1, 2014** and ending **SEP 30, 2015**

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return/terminated ☐ Amended return ☐ Application pending	C Name of organization BATTELLE MEMORIAL INSTITUTE		D Employer identification number 31-4379427
	Doing business as		E Telephone number (614)424-6424
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	G Gross receipts \$ 4,856,416,254
	505 KING AVENUE		H(a) Is this a group return for subordinates? ☐ Yes ☒ No
	City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, OH 43201-2693		H(b) Are all subordinates included? ☐ Yes ☐ No If "No," attach a list. (see instructions)
F Name and address of principal officer: DR. JEFFREY WADSWORTH SAME AS C ABOVE			H(c) Group exemption number
I Tax-exempt status: ☒ 501(c)(3) ☐ 501(c)() (insert no.) ☐ 4947(a)(1) or ☐ 527			
J Website: WWW.BATTELLE.ORG			
K Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other		L Year of formation: 1925	M State of legal domicile: OH

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities: SEE MISSION STATEMENT ON SCHEDULE O		
	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	8
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	7
	5 Total number of individuals employed in calendar year 2014 (Part V, line 2a)	5	22420
	6 Total number of volunteers (estimate if necessary)	6	0
	7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	48,105,283
b Net unrelated business taxable income from Form 990-T, line 34	7b	0	
Revenue	8 Contributions and grants (Part VIII, line 1h)	4,036,275,724	3,989,960,217
	9 Program service revenue (Part VIII, line 2g)	675,686,687	738,551,860
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	44,034,122	30,890,947
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	19,211,134	15,314,346
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	4,775,207,667	4,774,717,370
	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	7,755,174	5,585,808
	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)	2,468,165,548	2,490,962,318
	16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b Total fundraising expenses (Part IX, column (D), line 25)	0	0
	17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	2,394,419,206	2,312,633,901
	18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	4,870,339,928	4,809,182,027
19 Revenue less expenses. Subtract line 18 from line 12	-95,132,261	-34,464,657	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	1,178,659,091	1,125,324,072
	21 Total liabilities (Part X, line 26)	607,771,268	729,519,902
	22 Net assets or fund balances. Subtract line 21 from line 20	570,887,823	395,804,170

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	8/5/2015
	THOMAS E SHARPE, ASST. TREASURER Type or print name and title		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date
	Firm's name	Check ☐ if self-employed	PTIN
	Firm's address	Firm's EIN	Phone no.

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

432001 11-07-14

LHA For Paperwork Reduction Act Notice, see the separate instructions.

Form 990 (2014)

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒

1 Briefly describe the organization's mission:

BATTELLE MEMORIAL INSTITUTE ("BMI") IS ORGANIZED EXCLUSIVELY FOR CHARITABLE, EDUCATIONAL AND SCIENTIFIC PURPOSES, INCLUDING THE UTILIZATION OF SCIENCE, THE SCIENTIFIC METHOD AND RESEARCH FOR THE BENEFIT AND EDUCATION OF MANKIND.

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 \$ 2,937,993,095, including grants of \$) (Revenue \$ 360,238,252.)

BATTELLE MEMORIAL INSTITUTE ("BMI") AND ITS AFFILIATES OPERATE FIVE UNITED STATES DEPARTMENT OF ENERGY ("DOE") NATIONAL LABORATORIES: PACIFIC NORTHWEST NATIONAL LABORATORY; OAK RIDGE NATIONAL LABORATORY; IDAHO NATIONAL LABORATORY; BROOKHAVEN NATIONAL LABORATORY AND NATIONAL RENEWABLE ENERGY LABORATORY. BMI IS AN INTEGRATED SUBCONTRACTOR AT A SIXTH DOE NATIONAL LABORATORY: LAWRENCE LIVERMORE NATIONAL LABORATORY. IN ADDITION, A BMI AFFILIATE HOLDS THE MANAGEMENT CONTRACT WITH RESPECT TO THE UNITED STATES DEPARTMENT OF HOMELAND SECURITY'S NATIONAL BIODEFENSE ANALYSIS AND COUNTERMEASURES CENTER. THROUGH OPERATION OF THE NATIONAL LABORATORIES, BMI AND ITS AFFILIATES ADDRESS CRITICAL ELEMENTS OF THE NATION'S SCIENTIFIC RESEARCH AGENDA, PERFORM BASIC AND APPLIED SCIENTIFIC RESEARCH, CREATE SCIENTIFIC KNOWLEDGE AND TECHNICAL

4b (Code:) (Expenses \$ 455,831,601, including grants of \$) (Revenue \$ 332,436,158.)

BMI ALSO CONDUCTS SCIENTIFIC RESEARCH AND DEVELOPMENT PROGRAMS FOR OTHER FEDERAL, STATE AND LOCAL GOVERNMENT AGENCIES AND INDUSTRIAL SPONSORS, AND TRANSLATES SCIENCE AND TECHNOLOGY INTO PRODUCTS, SYSTEMS AND SERVICES FOR ITS SPONSORS. BMI PLACES SPECIAL EMPHASIS UPON SIGNATURE AREAS OF ENERGY, ENVIRONMENT AND MATERIAL SCIENCES, NATIONAL SECURITY, AND HEALTH AND LIFE SCIENCES.

4c (Code:) (Expenses \$ 5,585,808, including grants of \$ 5,585,808.) (Revenue \$)

EACH YEAR, BMI DISTRIBUTES AT LEAST TWENTY PERCENT OF ITS CONSOLIDATED NET INCOME TO PUBLIC CHARITIES AND GOVERNMENT AGENCIES. DISTRIBUTIONS ARE PRIMARILY FOCUSED UPON EDUCATION, HUMAN SERVICES, ARTS AND SCIENCES, AND ECONOMIC DEVELOPMENT. BMI ACTIVELY SUPPORTS EDUCATIONAL INITIATIVES IN OHIO AND ACROSS THE UNITED STATES THAT MEASURE STUDENT ACHIEVEMENT, ASSIST WITH PROFESSIONAL DEVELOPMENT FOR TEACHERS, AND PROMOTE INQUIRY-BASED LEARNING, ESPECIALLY IN THE SCIENCE, TECHNOLOGY, ENGINEERING, AND MATHEMATICS (STEM) DISCIPLINES.

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

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses 3,399,410,504.

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	☒	
2 Is the organization required to complete Schedule B, Schedule of Contributors?		☒
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		☒
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	☒	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III		☒
6 Did the organization maintain any donor advised funds or any similar funds or accounts 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		☒
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		☒
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		☒
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		☒
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		☒
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	☒	
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	☒	
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		☒
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		☒
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part 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		☒
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII		☒
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	☒	
13 Is the organization a school described in section 170(b)(1)(A)(iii)? If "Yes," complete Schedule E		☒
14a Did the organization maintain an office, employees, or agents outside of the United States?	☒	
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	☒	
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV		☒
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV		☒
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		☒
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		☒
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		☒
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H		☒
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		

Part IV Checklist of Required Schedules (continued)

	Yes	No	
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government 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 or other assistance to or for domestic individuals 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 25a	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), 501(c)(4), and 501(c)(29) 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 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? 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	X	
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?	38	X	

Note. All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

☒

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		
1a	3520		
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?	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	22420		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	X	
b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O	X	
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)?	X	
b	If "Yes," enter the name of the foreign country: SEE SCHEDULE O See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
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?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
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?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		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?		X
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		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. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
9a			
b	Did the sponsoring 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?		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		
12b			
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.		
13a			
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans		
13b			
c	Enter the amount of reserves on hand		
13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
14b			

Form 990 (2014)

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 or note to any line in this Part VI ☒

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year 1a 8		
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 7		
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	X	
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	X	

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ► CA, DC, IL, IN, KY, MA, NY, OH, OR, VA

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain in Schedule O)

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records: ►
 DAVID C. EVANS - 614-424-4777
 505 KING AVENUE, COLUMBUS OH 43201-2693

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

 Check if Schedule O contains a response or note to any line 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 (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JOHN K. WELCH CHAIRMAN AND DIRECTOR	3.00	X						134,631.	0.	0.
(2) VICKY A. BAILEY DIRECTOR	3.00	X						110,127.	0.	0.
(3) FRANK L. DOUGLAS DIRECTOR	3.00	X						110,127.	0.	0.
(4) MICHAEL J. GASSER DIRECTOR	3.00	X						112,461.	0.	0.
(5) LESTER L. LYLES DIRECTOR	3.00	X						115,131.	0.	0.
(6) JOHN B. MCCOY DIRECTOR TO 11/14	3.00	X						106,436.	0.	0.
(7) MICHAEL G. MORRIS DIRECTOR	3.00	X						113,127.	0.	0.
(8) SEAN C. O'KEEFE DIRECTOR	3.00	X						118,131.	0.	0.
(9) SUBRA SURESH DIRECTOR	3.00	X						35,127.	0.	0.
(10) JEFFREY WADSWORTH PRESIDENT & CEO	39.00 1.00			X				2,239,467.	0.	414,486.
(11) DAVID C. EVANS EXECUTIVE VP, CFO	40.00			X				1,081,992.	0.	51,122.
(12) RONALD D. TOWNSEND EXECUTIVE VP, GLOBAL LAB OPS	40.00			X				1,194,429.	0.	440,526.
(13) RUSSELL P. AUSTIN SR VP, GEN COUNSEL & SEC	40.00			X				571,889.	0.	213,852.
(14) UZMA S. BURKI SR VP, CHIEF HR OFFICER AS OF 8/15	40.00			X				0.	0.	0.
(15) PATRICK F. JARVIS SR VP, MKTG & COMM AS OF 11/14	40.00			X				383,807.	0.	52,028.
(16) JOHN J. GROSSENBACHER SENIOR VP	40.00			X				594,478.	0.	127,894.
(17) STEPHEN E. KELLY SENIOR VP	40.00			X				647,570.	0.	341,747.

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 (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) MICHAEL KLUSE SENIOR VP TO 3/15	40.00			X				650,229.	0.	457,903.
(19) STEVEN F. ASHBY SENIOR VP AS OF 5/15	40.00			X				411,443.	0.	111,847.
(20) THOMAS E. MASON SENIOR VP	40.00			X				605,695.	0.	457,161.
(21) MARTIN TOOMAJIAN SENIOR VP TO 6/15	40.00			X				511,769.	0.	162,641.
(22) GWENDOLYN C. VONHOLTEN VP FINANCE & ASST TREASURER	39.00 1.00			X				292,516.	0.	256,097.
(23) BRIAN R. SMITH TREASURER	39.00 1.00			X				194,951.	0.	42,724.
(24) THOMAS E. SHARPE ASST TREAS & ASST SEC	39.50 0.50			X				251,718.	0.	110,258.
(25) LAURENCE DOON GIBBS LABORATORY DIRECTOR	40.00				X			556,659.	0.	64,975.
(26) JEFFREY W. SMITH DEPUTY OF OPERATIONS	40.00					X		474,761.	0.	352,300.
1b Sub-total								11,618,671.	0.	3,657,561.
c Total from continuation sheets to Part VII, Section A								3,713,019.	0.	1,606,994.
d Total (add lines 1b and 1c)								15,331,690.	0.	5,264,555.
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										

7 358

	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
AMERICAN CENTRIFUGE OPERATING LLC, 6903 ROCKLEDGE DRIVE # 400, BETHESDA, MD 20817	TECHNICAL SERVICES	47,597,087.
GENERAL ATOMICS, 3350 GENERAL ATOMICS COURT, SAN DIEGO, CA 92121	RESEARCH IN BIOTECHNOLOGY	43,915,541.
BABCOCK & WILCOX NUCLEAR OPERATIONS GROUP P. O. BOX 741733, ATLANTA, GA 30374	FABRICATION	13,409,832.
HITACHI METALS AMERICA LTD. 2 MANHATTANVILLE ROAD, PURCHASE, NY 10577	EQUIPMENT & INSTALLATION	11,528,735.
BWXT NUCLEAR OPERATIONS GROUP 2016 MOUNT ATHOS ROAD, LYNCHBURG, VA 24504	BOILER AND HEAT EXCHANGER	9,476,060.
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	1	522

SEE PART VII, SECTION A CONTINUATION SHEETS

[illegible]

Part VIII Statement of RevenueCheck if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants and Other Similar Amounts	1 a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c				
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	3,977,119,744.			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	12,840,473.			
	g	Noncash contributions included in lines 1a-1f: \$					
	h	Total. Add lines 1a-1f		3,989,960,217.			
Program Service Revenue	2 a	GOVERNMENT CONTRACTS	Business Code 541700	588,577,176.	588,577,176.		
	b	SCIENTIFIC RESEARCH	541700	149,974,684.	104,097,234.	45,877,450.	
	c						
	d						
	e						
	f	All other program service revenue					
	g	Total. Add lines 2a-2f		738,551,860.			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		9,481,372.		1,837,833.	7,643,539.
	4	Income from investment of tax-exempt bond proceeds					
	5	Royalties		7,846,426.		390,000.	7,456,426.
	6 a	Gross rents	(i) Real 591,978.				
	b	Less: rental expenses	831,310.				
	c	Rental income or (loss)	-239,332.				
	d	Net rental income or (loss)		-239,332.			-239,332.
	7 a	Gross amount from sales of assets other than inventory	(i) Securities 101,775,165.	(ii) Other 501,984.			
	b	Less: cost or other basis and sales expenses	79,224,400.	1,643,174.			
	c	Gain or (loss)	22,550,765.	-1,141,190.			
	d	Net gain or (loss)		21,409,575.			21,409,575.
	8 a	Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	a				
	b	Less: direct expenses	b				
	c	Net income or (loss) from fundraising events					
	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	OTHER REVENUE	541700	7,030,512.			7,030,512.	
b	INCOME TAX BENEFIT	541700	555,817.			555,817.	
c	CURRENCY CONVERSION	541700	120,923.			120,923.	
d	All other revenue	541700					
e	Total. Add lines 11a-11d		7,707,252.				
12	Total revenue. See instructions.		4,774,717,370.	692,674,410.	48,105,283.	43,977,460.	

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 or note to any line 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 domestic organizations and domestic governments. See Part IV, line 21	5,580,808.	5,580,808.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	5,000.	5,000.		
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	11,217,010.		11,217,010.	
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	1,919,848,120.	1,299,763,655.	620,084,465.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	157,972,895.	97,519,747.	60,453,148.	
9 Other employee benefits	288,901,245.	171,846,730.	117,054,515.	
10 Payroll taxes	113,023,048.	67,465,020.	45,558,028.	
11 Fees for services (non-employees):				
a Management	880,772,031.	880,772,031.		
b Legal	7,250,636.		7,250,636.	
c Accounting	120,990.		120,990.	
d Lobbying	774,675.	774,675.		
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	1,072,287.		1,072,287.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	413,354,022.	227,686,522.	185,667,500.	
12 Advertising and promotion	1,535,649.	1,535,649.		
13 Office expenses	14,276,996.	3,804,793.	10,472,203.	
14 Information technology	55,935,570.	32,091,133.	23,844,437.	
15 Royalties				
16 Occupancy	137,976,199.	83,859,806.	54,116,393.	
17 Travel	89,448,733.	55,821,734.	33,626,999.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	2,642,484.	1,625,105.	1,017,379.	
20 Interest	8,149,055.	4,807,408.	3,341,647.	
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	34,510,326.	18,901,221.	15,609,105.	
23 Insurance	4,273,694.		4,273,694.	
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 PURCHASES	541,774,887.	378,915,026.	162,859,861.	
b RENTAL & MAINTENANCE	40,875,986.	24,574,407.	16,301,579.	
c NON-INCOME TAX EXPENSE	22,604,894.	14,234,476.	8,370,418.	
d RESTRUCTURING COSTS	22,180,763.	12,135,348.	10,045,415.	
e All other expenses	33,104,024.	15,690,210.	17,413,814.	
25 Total functional expenses. Add lines 1 through 24e	4,809,182,027.	3,399,410,504.	1,409,771,523.	0.
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 SheetCheck if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	57,853,209.	1	41,561,305.
	2 Savings and temporary cash investments	59,410,545.	2	67,458,591.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	269,728,378.	4	249,425,895.
	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	6,347,543.	8	8,058,689.
	9 Prepaid expenses and deferred charges	18,331,362.	9	21,189,992.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 661,832,813.		
	b Less: accumulated depreciation	10b 412,667,365.		
	11 Investments - publicly traded securities	285,324,215.	10c	249,165,448.
	12 Investments - other securities. See Part IV, line 11	301,742,623.	11	283,789,423.
	13 Investments - program-related. See Part IV, line 11	156,792,424.	12	174,826,402.
	14 Intangible assets		13	
	15 Other assets. See Part IV, line 11		14	
16 Total assets. Add lines 1 through 15 (must equal line 34)	23,128,792.	15	29,848,327.	
	1,178,659,091.	16	1,125,324,072.	
Liabilities	17 Accounts payable and accrued expenses	129,203,075.	17	130,590,426.
	18 Grants payable		18	
	19 Deferred revenue	32,815,960.	19	37,819,158.
	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	218,200,000.	23	222,200,000.
	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	227,552,233.	25	338,910,318.
	26 Total liabilities. Add lines 17 through 25	607,771,268.	26	729,519,902.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here ☐ and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets		27	
	28 Temporarily restricted net assets		28	
	29 Permanently restricted net assets		29	
	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	0.	30	0.
	31 Paid-in or capital surplus, or land, building, or equipment fund	0.	31	0.
	32 Retained earnings, endowment, accumulated income, or other funds	570,887,823.	32	395,804,170.
33 Total net assets or fund balances	570,887,823.	33	395,804,170.	
34 Total liabilities and net assets/fund balances	1,178,659,091.	34	1,125,324,072.	

Form 990 (2014)

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,774,717,370.
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,809,182,027.
3	Revenue less expenses. Subtract line 2 from line 1	3	-34,464,657.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	570,887,823.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	-1,806,173.
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-138,812,823.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	395,804,170.

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

☐

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

Form 990 (2014)

OMB No. 1545-0047

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.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

2014

Open to Public
Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

31-4379427

Part I	Reason for Public Charity Status (All organizations must complete this part.) See instructions.
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The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention, 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 in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g. 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 listed in your governing document?		(v) Amount of monetary support (see Instructions)	(vi) Amount of other support (see Instructions)
			Yes	No		
Total						

Total

LHA For Paperwork Reduction Act Notice, see the Instructions for

Schedule A (Form 990 or 990-EZ) 2014

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) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	4550460328.	4368714116.	4044734254.	4036275724.	3989960217.	20990144639.
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	4550460328.	4368714116.	4044734254.	4036275724.	3989960217.	20990144639.
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)						
6 Public support. Subtract line 5 from line 4.						20990144639.

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
7 Amounts from line 4	4550460328.	4368714116.	4044734254.	4036275724.	3989960217.	20990144639.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	26,524,039.	18,032,578.	15,940,398.	17,696,880.	16,103,324.	94,297,219.
9 Net income from unrelated business activities, whether or not the business is regularly carried on	93,310.	896,781.	708,913.	894,717.	26,784.	2,620,505.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						21087062363.
12 Gross receipts from related activities, etc. (see instructions)					12	3,714,855,977.
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 2014 (line 6, column (f) divided by line 11, column (f))	14	99.54	%
15 Public support percentage from 2013 Schedule A, Part II, line 14	15	99.52	%
16a 33 1/3% support test - 2014. 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 ☒			
b 33 1/3% support test - 2013. 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 - 2014. 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 VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐			
b 10% -facts-and-circumstances test - 2013. 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 VI 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) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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 VI.)						
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 2014 (line 8, column (f) divided by line 13, column (f))	15		%
16 Public support percentage from 2013 Schedule A, Part III, line 15	16		%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f))	17		%
18 Investment income percentage from 2013 Schedule A, Part III, line 17	18		%

19a 33 1/3% support tests - 2014. 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 - 2013. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐

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

Part IV Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No" describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.		
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations; (b) individuals that are part of the charitable class benefited by one or more of its supported organizations; or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990).		
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI .		
b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI .		
10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer (b) below.		
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)		

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?		
11a		
b A family member of a person described in (a) above?		
11b		
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.		
11c		

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
1		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
2		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
1		

Section D. Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
1		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
2		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		
3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
2 Activities Test. Answer (a) and (b) below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	Yes	No
2a		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
2b		
3 Parent of Supported Organizations. Answer (a) and (b) below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.		
3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		
3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970. See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income

		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	

Section B - Minimum Asset Amount

		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount

			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions).		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2014 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
1 Distributable amount for 2014 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2014 (reasonable cause required-see instructions)			
3 Excess distributions carryover, if any, to 2014:			
a			
b			
c			
d			
e From 2013			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2014 distributable amount			
i Carryover from 2009 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2014 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2014 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2014, if any. Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions).			
6 Remaining underdistributions for 2014. Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions).			
7 Excess distributions carryover to 2015. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a			
b			
c			
d Excess from 2013			
e Excess from 2014			

Part VI**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12.

Also complete this part for any additional information. (See instructions).

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527
▶ **Complete if the organization is described below. ▶ Attach to Form 990 or Form 990-EZ.**
▶ Information about Schedule C (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public
Inspection

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.

2 Political expenditures ▶ \$ 0.

3 Volunteer hours 0.

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$ 0.

2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$ 0.

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV.

Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527

exempt function activities ▶ \$

3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ▶ \$

4 Did the filing organization file Form 1120-POL for this year? ☐ Yes ☐ No

5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-

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

Schedule C (Form 990 or 990-EZ) 2014

Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)			
b Total lobbying expenditures to influence a legislative body (direct lobbying)			
c Total lobbying expenditures (add lines 1a and 1b)			
d Other exempt purpose expenditures			
e Total exempt purpose expenditures (add lines 1c and 1d)			
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.			
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:		
Not over \$500,000	20% of the amount on line 1e.		
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.		
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.		
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.		
Over \$17,000,000	\$1,000,000.		
g Grassroots nontaxable amount (enter 25% of line 1f)			
h Subtract line 1g from line 1a. If zero or less, enter -0-			
i Subtract line 1f from line 1c. If zero or less, enter -0-			
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ Yes ☐ No			

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 separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2011	(b) 2012	(c) 2013	(d) 2014	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Schedule C (Form 990 or 990-EZ) 2014

Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes," response to lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?		X	
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	X		
c Media advertisements?		X	
d Mailings to members, legislators, or the public?		X	
e Publications, or published or broadcast statements?		X	
f Grants to other organizations for lobbying purposes?		X	
g Direct contact with legislators, their staffs, government officials, or a legislative body?	X		733,695.
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		X	
i Other activities?	X		35,648.
j Total. Add lines 1c through 1i			769,343.
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		X	
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carry over lobbying and political expenditures from the prior year?	3	

Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No," OR (b) Part III-A, line 3, is answered "Yes."

1 Dues, assessments and similar amounts from members	1	
2 Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

PART II-B, LINE 1. LOBBYING ACTIVITIES:

LINE 1 (I) OTHER ACTIVITIES

TEN ORGANIZATIONS REPORTED THAT A PORTION OF MEMBERSHIP DUES PAID BY

BATTELLE WERE USED FOR LOBBYING.

SCHEDULE C SUPPLEMENTAL INFORMATION - PART IV

Part IV Supplemental Information (continued)

INTERNAL LOBBYING EXPENSES TOTALED \$295,993 AND EXTERNAL LOBBYING EXPENSES

TOTALED \$437,702 FOR A TOTAL OF \$733,695.

THE GENERAL ISSUE AREA FOR LOBBYING IS INCREASED APPROPRIATIONS IN THE

FEDERAL BUDGET FOR SCIENTIFIC RESEARCH AND DEVELOPMENT PROGRAMS THROUGH

APPROPRIATIONS AND REPORT LANGUAGE.

THE SPECIFIC LOBBYING ISSUES INCLUDE THE HOUSE AND SENATE AUTHORIZATION

AND APPROPRIATIONS BILLS FOR ENERGY AND WATER DEVELOPMENT; DEFENSE; LABOR,

HEALTH AND HUMAN SERVICES, EDUCATION, AND RELATED AGENCIES; COMMERCE,

JUSTICE, SCIENCE, AND RELATED AGENCIES; HOMELAND SECURITY.

THE HOUSE(S) OF CONGRESS AND FEDERAL AGENCIES CONTACTED INCLUDE: U.S.

HOUSE, U.S. SENATE, DEPARTMENT OF ENERGY, DEPARTMENT OF DEFENSE,

DEPARTMENT OF TRANSPORTATION, DEPARTMENT OF HOMELAND SECURITY,

ENVIRONMENTAL PROTECTION AGENCY, DEPARTMENT OF HEALTH AND HUMAN SERVICES

(NATIONAL INSTITUTES OF HEALTH).

IN ADDITION, A MINOR AMOUNT OF LOBBYING IS CONDUCTED WITH VARIOUS STATE

AND LOCAL GOVERNMENTS AND/OR AGENCIES.

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.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public
Inspection

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

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 value of contributions to (during year)		
3 Aggregate value of 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)	☐ Preservation of a historically important land area
☐ Protection of natural habitat	☐ Preservation of a certified historic structure
☐ Preservation of open space	

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

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

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

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

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

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

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

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

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

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

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

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

(i) Revenue 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 Revenue 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:

c Beginning balance

d Additions during the year

e Distributions during the year

f Ending balance

	Amount
1c	
1d	
1e	
1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ 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					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

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

a Board designated or quasi-endowment ☐ %

b Permanent endowment ☐ %

c Temporarily restricted endowment ☐ %

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:

(i) unrelated organizations

(ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

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

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

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11a. 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	13,665,132.			13,665,132.
b Buildings	411,054,769.		252,888,335.	158,166,434.
c Leasehold improvements				
d Equipment	226,700,645.		159,779,030.	66,921,615.
e Other	10,412,267.			10,412,267.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				249,165,448.

Part VII Investments - Other Securities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11b. 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	167,119,411.	COST
(3) Other		
(A) RABBI TRUSTS	7,706,991.	END-OF-YEAR MARKET VALUE
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)	174,826,402.	

Part VIII Investments - Program Related.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

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

Part IX Other Assets.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

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

Part X Other Liabilities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) LONG TERM BENEFIT RELATED LIABILITIES	5,942,923.
(3) OTHER LONG TERM LIABILITIES	3,505,299.
(4) LIABILITY FOR POSTRETIREMENT & OTHER BENEFITS	329,462,096.
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	338,910,318.

2. Liability for uncertain tax positions. 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.

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements		1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		
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	
3	Subtract line 2e from line 1		3	
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	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	

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

Complete if the organization answered "Yes" to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements		1	
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	
3	Subtract line 2e from line 1		3	
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	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	

Part XIII Supplemental Information.

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.

SUPPLEMENTAL INFORMATION

PART X, LINE 2 - FIN 48(ASC 740) FOOTNOTE

THE PROVISIONS OF FIN 48 INCLUDED IN FASB ASC 740 APPLY TO BATTELLE

MEMORIAL INSTITUTE (BMI), A FIN 48 ANALYSIS FOR UNCERTAIN INCOME TAX

POSITIONS WAS PERFORMED BY BMI AND REVIEWED BY ITS INDEPENDENT AUDITORS.

AS A RESULT OF THE ANALYSIS, NO FIN 48 RESERVES FOR UNCERTAIN TAX

POSITIONS WERE REQUIRED AND NONE WERE RECORDED IN THE FINANCIAL

STATEMENTS, THEREFORE NO SPECIFIC FIN 48 FOOTNOTE WAS INCLUDED IN BMI'S

FINANCIAL STATEMENTS.

Part XIII Supplemental Information *(continued)*

SCHEDULE F
(Form 990)Department of the Treasury
Internal Revenue Service**Statement of Activities Outside the United States**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

▶ Attach to Form 990.

▶ Information about Schedule F (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014Open to Public
Inspection

Name of the organization

Employer identification number

BATTELLE MEMORIAL INSTITUTE

31-4379427

Part I **General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on
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? ☒ 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
EAST ASIA AND THE PACIFIC	4	5	PROGRAM SERVICES	SCIENTIFIC RESEARCH/SERVICES	1,272,024.
EUROPE	6	69	PROGRAM SERVICES	SCIENTIFIC RESEARCH/SERVICES AND LABORATORY MANAGEMENT	15,217,850.
MIDDLE EAST AND NORTH AFRICA	6	8	PROGRAM SERVICES	SCIENTIFIC RESEARCH/SERVICES	6,677,165.
NORTH AMERICA	1	1	PROGRAM SERVICES	SCIENTIFIC RESEARCH/SERVICES	217,347.
RUSSIA AND NEIGHBORING STATES - ARMENIA, AZERBIJAN, BELARUS	3	53	PROGRAM SERVICES	SCIENTIFIC RESEARCH/SERVICES AND LABORATORY MANAGEMENT	8,258,787.
EAST ASIA AND THE PACIFIC			INVESTMENTS		13,758,216.
EUROPE			INVESTMENTS		27,298,728.
MIDDLE EAST AND NORTH AFRICA			INVESTMENTS		411,136.
3 a Sub-total	20	136			73,111,253.
b Total from continuation sheets to Part I	0	0			6,002,022.
c Totals (add lines 3a and 3b)	20	136			79,113,275.

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

Schedule F (Form 990) 2014

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i.e., fundraising, program services, 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 region
SOUTH ASIA			INVESTMENTS		6,002,022.
Totals					6,002,022.

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on 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.

[illegible]

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; do not file with Form 990) ☐ 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; do not file with Form 990) ☒ Yes ☐ No

Schedule F (Form 990) 2014

Part V Supplemental Information

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.

PART I, LINE 3:

ALL EXPENDITURES ARE BASED ON THE ACCRUAL METHOD OF ACCOUNTING.

PART II, EXPLANATION:

BMI PROVIDED A \$5,000 GRANT TO THE FRIENDS OF GEORGIAN BASEBALL AND
SOFTBALL FOUNDATION, A NONPROFIT ORGANIZATION FORMED IN THE REPUBLIC OF
GEORGIA TO SUPPORT BASEBALL AND SOFTBALL FOR THE YOUTH IN THE LOCAL
AREA WHERE BMI ESTABLISHED AN OFFICE. A BATTELLE STAFF MEMBER RESIDING
IN THE COUNTRY IS ON THE ORGANIZATION'S BOARD OF DIRECTORS.

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.

OMB No 1545-0047

2014

Open to Public
Inspection

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

Employer identification number
31-4379427

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 Domestic Organizations and Domestic Governments. 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
AMERICAN HERITAGE FOUNDATION 910 17TH STREET NW STE 408 WASHINGTON, DC 20006	68-0480736	501(C)(3)	6,250.	0.			GENERAL OPERATING SUPPORT
BOISE SCHOOL DISTRICT 3101 CASSIA ST BOISE, ID 83705	82-6000549	170(C)(1)	5,823.	0.			CLASSROOM MAKEOVER GRANT
BOISE STATE UNIVERSITY FOUNDATION 1910 UNIVERSITY DR. BOISE, ID 83725	82-6010706	501(C)(3)	185,500.	0.			STEM
CARNEGIE MELLON UNIVERSITY 5000 FORBES AVE, WARNER HALL 6 PITTSBURGH, PA 15213	25-0969449	501(C)(3)	20,000.	0.			GENERAL OPERATING SUPPORT
CENTER FOR CHILD & FAMILY ADVOCACY 1 WHITEBARD ROAD NEW ALBANY, OH 43054	02-0627166	501(C)(3)	23,240.	0.			SPONSORSHIP
CENTER OF SCIENCE AND INDUSTRY 333 W BROAD STREET COLUMBUS, OH 43215	31-1351334	501(C)(3)	10,000.	0.			SPONSORSHIP
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.

Schedule I (Form 990) (2014)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)							
(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
CENTRAL OHIO TRAUMA SYSTEM 1390 DUBLIN ROAD COLUMBUS, OH 43215	31-1592734	501(C)(3)	0.	18,166.	FMV	TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
COLORADO EDUCATION INITIATIVE 1660 LINCOLN STREET, SUITE 2000 DENVER, CO 80264	26-1597530	501(C)(3)	25,000.	0.			INCORPORATING AIRALERT IN HIGH SCHOOL CURRICULUM
COLUMBUS FIRE DIVISION 300 N 4TH STREET COLUMBUS, OH 43215	31-6400223	170(C)(1)	0.	28,364.	FMV	TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
COLUMBUS FOUNDATION 1234 E BROAD STREET COLUMBUS, OH 43205	31-6044264	501(C)(3)	4,300,000.	0.			GENERAL OPERATING SUPPORT
COLUMBUS METROPOLITAN CLUB 100 EAST BROAD STREET, SUITE 100 COLUMBUS, OH 43215	31-0889324	501(C)(3)	9,655.	0.			SPONSORSHIP
COLUMBUS METROPOLITAN LIBRARY FOUNDATION - 96 S GRANT AVE - COLUMBUS, OH 43215	31-1692755	501(C)(3)	49,050.	0.			CELEBRATION OF LEARNING SPONSOR
COLUMBUS MUSEUM OF ART 480 E BROAD STREET COLUMBUS, OH 43215	31-4379447	501(C)(3)	37,550.	0.			SUPPORT THE MUSEUM ANNUAL FUND
EIEDC FOUNDATION 151 NORTH RIDGE AVE IDAHO FALLS, ID 83402	82-0460529	501(C)(3)	30,000.	0.			GENERAL OPERATING SUPPORT
EMORY VALLEY CENTER 990 OAK RIDGE TURNPIKE OAK RIDGE, TN 37830	62-1414205	501(C)(3)	50,000.	0.			GENERAL OPERATING SUPPORT

Schedule I (Form 990)

BATELLE MEMORIAL INSTITUTE

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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
FREDERICK COMMUNITY COLLEGE 7932 OPOSSUMTOWN PIKE FREDERICK, MD 21702	52-0743590	170(C)(1)	10,000.	0.			LEADERSHIP
FREDERICK COUNTY PUBLIC SCHOOLS 6 NORTH EAST STREET SUITE 201 FREDERICK, MD 21702	52-6000941	170(C)(1)	63,000.	7,501.FMV		BACKPACKS	GENERAL OPERATING SUPPORT
HABITAT FOR HUMANITY 643 MIDDLE COUNTRY ROAD MIDDLE ISLAND, NY 11953	11-2840553	501(C)(3)	10,000.	0.			GENERAL OPERATING SUPPORT
HABITAT FOR HUMANITY MID ORIO 3140 WESTERVILLE ROAD COLUMBUS, OH 43224	31-1217994	501(C)(3)	0.	6,432.FMV		TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
HARDIN VALLEY ACADEMY 11345 HARDIN VALLEY RD KNOXVILLE, TN 37932	46-0737187	501(C)(3)	5,150.	0.			GENERAL OPERATING SUPPORT
IDAHO DEPARTMENT OF EDUCATION 650 WEST STATE STREET BOISE, ID 83720	82-6000952	170(C)(1)	9,000.	0.			STEM
IDAHO FALLS ARTS COUNCIL 498 A STREET IDAHO FALLS, ID 83402	82-0434714	501(C)(3)	10,000.	0.			SPONSORSHIP
IDAHO FALLS ENERGY PROJECT 601 S. HOLMES AVE IDAHO FALLS, ID 83401	82-6001158	501(C)(3)	49,513.	0.			GENERAL OPERATING SUPPORT
IDAHO FALLS SYMPHONY SOCIETY INC. 450 A. STREET IDAHO FALLS, ID 83402	82-6007411	501(C)(3)	7,500.	0.			SUPPORT PROGRAMMING AND EDUCATIONAL OUTREACH PROGRAM

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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
IDAHO GOVERNOR'S CUP PO BOX 983 BOISE, ID 83701	20-8277116	501(C)(3)	16,000.	0.			SCHOLARSHIP FUND
JEFFERSON COUNTY SCHOOL DISTRICT 306 N. 3700 E. RIGBY, ID 83442	82-5000779	170(C)(1)	5,500.	0.			CLASSROOM MAKEOVER GRANT
LOGAN ELM HIGH SCHOOL 9575 TARLTON ROAD CIRCLEVILLE, OH 43113	31-6402678	170(C)(1)	0.	59,348. FMV		TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
MINERALS METALS & MATERIALS SOCIETY - 184 THORN HILL RD - WARRENDALE, PA 15086	25-1484913	501(C)(3)	20,000.	0.			GENERAL OPERATING SUPPORT
MUSEUM OF IDAHO 200 N EASTERN AVE IDAHO FALLS, ID 83402	82-0363177	501(C)(3)	25,000.	0.			SUSTAINABILITY EFFORT
OAK RIDGE PUBLIC SCHOOLS P. O. BOX 117, MS-22 OAK RIDGE, TN 37831	62-1809810	501(C)(3)	10,000.	0.			GENERAL OPERATING SUPPORT
OAK RIDGE ROTARY COMMUNITY FUND P. O. BOX 6331 OAK RIDGE, TN 37831	62-1693222	501(C)(3)	35,000.	0.			GENERAL OPERATING SUPPORT
REGION VI DEVELOPMENT ASSOCIATION 315 FALLS AVE, P.O. BOX 1844 TWIN FALLS, ID 83301	82-0311062	501(C)(3)	20,000.	0.			TECHNOLOGY-BASED ECONOMIC DEVELOPMENT GRANT
ROANE STATE FOUNDATION 276 PATTON LANE HARRIMAN, TN 37748	58-1413034	501(C)(3)	17,000.	0.			GENERAL OPERATING SUPPORT

Schedule I (Form 990)

Schedule I (Form 990) BATTELLE MEMORIAL INSTITUTE**Part II** Continuation of Grants and Other Assistance to Governments and Organizations in the United States (Schedule I (Form 990), Part II.)

(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
SOUTHEAST IDAHO RESEARCH INSTITUTE 310 N 2ND E STE 113 REXBURG, ID 83440	27-3465046	501(C)(3)	30,000.	0.			GENERAL OPERATING SUPPORT
THE ART MUSEUM OF EASTERN IDAHO 300 S CAPITAL AVE IDAHO FALLS, ID 83402	48-1273754	501(C)(3)	5,500.	0.			GENERAL OPERATING SUPPORT
THE COLUMBIA BASIN COLLEGE 2600 NORTH 20TH AVE PASCO, WA 91082	91-1307538	501(C)(3)	0.	50,000.	FMV	TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
THE OHIO STATE UNIVERSITY 100 WEST 18TH AVENUE COLUMBUS, OH 43210	31-6025986	501(C)(3)	0.	17,943.	FMV	TECHNICAL EQUIPMENT	GENERAL OPERATING SUPPORT
THE UNIVERSITY OF TENNESSEE 800 ANDY HOLT TOWER KNOXVILLE, TN 37956	62-6001636	170(C)(1)	17,500.	0.			SCHOLARSHIP FUND
TNFIRST, LLC 1020 COMMERCE PARK DRIVE OAK RIDGE, TN 37830	26-4400392	501(C)(3)	15,000.	0.			GENERAL OPERATING SUPPORT
TRIANGLE RESIDENTIAL OPTIONS FOR SUBSTANCE ABUSERS - 1820 JAMES STREET - DURHAM, NC 27707	56-1861158	501(C)(3)	0.	9,152.	FMV	OFFICE EQUIPMENT	GENERAL OPERATING SUPPORT
UNITED WAY 1301 HANNAH AVENUE KNOXVILLE, TN 37921	62-1818021	501(C)(3)	100,000.	0.			GENERAL OPERATING SUPPORT
UNITED WAY OF BONNEVILLE CNTY 151 NORTH RIDGE AVE., SUITE 180 IDAHO FALLS, ID 83402	82-0233588	501(C)(3)	42,985.	0.			GENERAL OPERATING SUPPORT

Schedule I (Form 990)

Part IV Supplemental Information

CHARITY.

SUPPLEMENTAL EXPLANATION

BMI WAS CREATED PURSUANT TO THE WILL OF GORDON BATTELLE AS AN OHIO

NOT-FOR-PROFIT CORPORATION, SPECIFICALLY AS AN OHIO INCORPORATED

CHARITABLE TRUST. AS AN INCORPORATED CHARITABLE TRUST, BMI IS SUBJECT

TO THE GENERAL SUPERVISION OF THE OHIO ATTORNEY GENERAL AND TO THE

REQUIREMENTS OF OHIO NONPROFIT CORPORATION STATUTES. THE ORIGINAL

PURPOSE OF BMI WAS TO CONDUCT RESEARCH IN METALLURGY OF COAL, IRON,

STEEL AND ZINC AND TO MAKE DISTRIBUTIONS TO OTHER CHARITABLE

ORGANIZATIONS. PURSUANT TO AN AGREEMENT WITH THE OHIO ATTORNEY

GENERAL, BMI MAKES ANNUAL DISTRIBUTIONS FOR CHARITABLE PURPOSES EQUAL

TO AT LEAST 20% OF ITS FINANCIAL STATEMENT NET INCOME, BUT NOT LESS

THAN ONE MILLION DOLLARS. ON AUGUST 11, 2005 THE BOARD OF DIRECTORS OF

BATTELLE ADOPTED A RESOLUTION THAT ESTABLISHED A MINIMUM CHARITABLE

DISTRIBUTION GOAL OF \$3,000,000.

IN AUGUST 2005, BMI ESTABLISHED A DONOR ADVISED FUND, THE BATTELLE

FOUNDATION FUND (THE FUND), UNDER THE COLUMBUS FOUNDATION, A 501(C)(3)

PUBLIC CHARITY COMMUNITY FOUNDATION THAT IS LEGALLY AND FINANCIALLY

SEPARATE FROM BMI. A SUBSTANTIAL PORTION OF BMI'S CHARITABLE

DISTRIBUTIONS ARE EXPECTED TO BE MADE TO THE FUND. BMI RECOMMENDS

DISTRIBUTIONS FROM THE FUND TO QUALIFYING RECIPIENTS; HOWEVER, THE

COLUMBUS FOUNDATION MAKES FINAL DECISIONS ON THE ACTUAL DISTRIBUTIONS.

THE FUNDS TRANSFERRED FROM BMI TO THE FUND HAVE NO POSSIBILITY OF

REVERSION TO BMI. DISTRIBUTIONS TO THE FUND FULFILL THE OBLIGATIONS

UNDER THE WILL OF GORDON BATTELLE AND THE AGREEMENT WITH THE OHIO

ATTORNEY GENERAL.

Part IV	Supplemental Information
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SCHEDULE J
(Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

► Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

► Attach to Form 990.

► Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public
Inspection

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

☒ First-class or charter travel

☒ Travel for companions

☒ Tax indemnification and gross-up payments

☐ Discretionary spending account

☐ Housing allowance or residence for personal use

☐ Payments for business use of personal residence

☒ Health or social club dues or initiation fees

☐ Personal services (e.g., maid, chauffeur, chef)

Yes No

b If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

1b x

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked in line 1a?

2 x

3 Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

☒ Compensation committee

☒ Independent compensation consultant

☐ Form 990 of other organizations

☒ Written employment contract

☒ Compensation survey or study

☒ Approval by the board or compensation committee

4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

a Receive a severance payment or change-of-control payment?

4a x

b Participate in, or receive payment from, a supplemental nonqualified retirement plan?

4b x

c Participate in, or receive payment from, an equity-based compensation arrangement?

4c x

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.

5 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

a The organization?

5a x

b Any related organization?

5b x

If "Yes" to line 5a or 5b, describe in Part III.

6 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

a The organization?

6a x

b Any related organization?

6b x

If "Yes" to line 6a or 6b, describe in Part III.

7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III

7 x

8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

8 x

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

9

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

Schedule J (Form 990) 2014

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

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

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

(A) Name and Title	(B) Breakdown of W-2 and/or 1099-MISC compensation				(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred in prior Form 990
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation					
(1) JEFFREY WADSWORTH PRESIDENT & CEO	(i) 1,059,113. (ii) 0.	1,142,725. 0.	37,529. 0.		398,787. 0.	15,699. 0.	2,653,953. 0.	0. 0.
(2) DAVID C. EVANS EXECUTIVE VP, CFO	(i) 514,564. (ii) 0.	557,760. 0.	9,668. 0.		30,921. 0.	20,201. 0.	1,133,114. 0.	0. 0.
(3) RONALD D. TOWNSEND EXECUTIVE VP, GLOBAL LAB OPS	(i) 563,688. (ii) 0.	614,477. 0.	16,264. 0.		426,758. 0.	13,768. 0.	1,634,955. 0.	0. 0.
(4) RUSSELL P. AUSTIN SR VP, GEN COUNSEL & SEC	(i) 374,521. (ii) 0.	195,929. 0.	1,439. 0.		194,717. 0.	19,135. 0.	785,741. 0.	0. 0.
(5) PATRICK F. JARVIS SR VP, MKTG & COMM AS OF 11/14	(i) 266,573. (ii) 0.	115,274. 0.	960. 0.		31,871. 0.	20,157. 0.	435,835. 0.	0. 0.
(6) JOHN J. GROSSENBAKER SENIOR VP	(i) 388,257. (ii) 0.	195,785. 0.	10,436. 0.		114,886. 0.	13,008. 0.	722,372. 0.	0. 0.
(7) STEPHEN E. KELLY SENIOR VP	(i) 387,215. (ii) 0.	253,595. 0.	6,760. 0.		325,892. 0.	15,855. 0.	989,317. 0.	0. 0.
(8) MICHAEL KLUSE SENIOR VP TO 3/15	(i) 351,630. (ii) 0.	200,305. 0.	98,294. 0.		443,698. 0.	14,205. 0.	1,108,132. 0.	0. 0.
(9) STEVEN F. ASHBY SENIOR VP AS OF 5/15	(i) 274,342. (ii) 0.	95,509. 0.	41,592. 0.		91,761. 0.	20,086. 0.	523,290. 0.	0. 0.
(10) THOMAS E. MASON SENIOR VP	(i) 402,931. (ii) 0.	194,676. 0.	8,088. 0.		427,710. 0.	29,451. 0.	1,062,856. 0.	0. 0.
(11) MARTIN TOOMAJIAN SENIOR VP TO 6/15	(i) 306,336. (ii) 0.	202,627. 0.	2,806. 0.		141,059. 0.	21,582. 0.	674,410. 0.	0. 0.
(12) GWENDOLYN C. VONHOLTEN VP FINANCE & ASST TREASURER	(i) 246,464. (ii) 0.	43,391. 0.	2,561. 0.		241,066. 0.	15,031. 0.	548,613. 0.	0. 0.
(13) BRIAN R. SMITH TREASURER	(i) 172,277. (ii) 0.	22,421. 0.	253. 0.		36,433. 0.	6,291. 0.	237,675. 0.	0. 0.
(14) THOMAS E. SHARPE ASST TREAS & ASST SEC	(i) 212,962. (ii) 0.	37,973. 0.	783. 0.		89,128. 0.	21,130. 0.	361,976. 0.	0. 0.
(15) LAURENCE DOON GIBBS LABORATORY DIRECTOR	(i) 359,625. (ii) 0.	183,750. 0.	13,284. 0.		26,000. 0.	38,975. 0.	621,634. 0.	0. 0.
(16) JEFFREY W. SMITH DEPUTY OF OPERATIONS	(i) 326,931. (ii) 0.	139,813. 0.	8,017. 0.		332,144. 0.	20,156. 0.	827,061. 0.	0. 0.

BATELLE MEMORIAL INSTITUTE

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I. LINE 1A:

DIRECTORS, OFFICERS, AND STAFF TRAVEL ON THE CORPORATE PLANES. TRAVEL

EXPENSES COMPLY WITH A WRITTEN REIMBURSEMENT POLICY THAT FOLLOWS PUBLISHED

IRS GUIDANCE. ALL EXECUTIVES, INCLUDING THOSE INDIVIDUALS REPORTED ON PART

VII, ARE REQUIRED TO SUBSTANTIATE TRAVEL AND ENTERTAINMENT EXPENSES IN

ACCORDANCE WITH THE POLICY. INTERNAL AUDIT EXAMINES ALL EXPENSE REPORTS

ASSOCIATED WITH DIRECTOR'S AND OFFICER'S TRAVEL AND ENTERTAINMENT EXPENSES.

ANY TRAVEL NOT DEEMED AS NON-TAXABLE IS REPORTABLE AS TAXABLE COMPENSATION

IN THE W-2. FOR 2014 ONE CURRENT OFFICER HAD REPORTABLE TRAVEL LISTED IN

THE W-2 WITH A GROSS UP FOR TAXES.

BMI PROVIDES A TAX GROSS-UP FOR FOREIGN TAXES, FOREIGN ALLOWANCES,

RELOCATION COSTS, AND OTHER MISCELLANEOUS ITEMS. FOR 2014 ONE EMPLOYEE, ONE

FORMER OFFICER, AND NINE DIRECTORS HAD GROSS UPS.

SOCIAL CLUB DUES PERTAIN TO DUES THAT ALLOW BUSINESS MEETINGS AND BUSINESS

ACTIVITIES TO TAKE PLACE. FOR 2014 THERE WERE TWO CURRENT OFFICERS WITH

SOCIAL CLUB DUES.

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

PART I, LINE 4B:

NO SEVERANCE PAYMENTS WERE MADE TO ANY INDIVIDUALS LISTED ON FORM 990. PART

VII.

EFFECTIVE JANUARY 1, 2006, BMI IMPLEMENTED THE BATTELLE MEMORIAL INSTITUTE

EXECUTIVE'S SECTION 457(F) PENSION PLAN (THE 457(F) PLAN). AN ERISA TOP HAT

PLAN. THE 457(F) PLAN IS A COMPONENT OF BMI'S TOTAL COMPENSATION PACKAGE

AND REFLECTS ITS BASIC PHILOSOPHY WITH RESPECT TO DEFINED BENEFIT PENSIONS:

THE SAME PENSION FORMULAS ARE TO BE APPLIED IN DETERMINING THE PENSION OF

ALL EMPLOYEES, REGARDLESS OF POSITION OR COMPENSATION LEVEL. THE 457(F)

PLAN PROVIDES AN ACCRUAL OF THAT PORTION OF AN OFFICER'S OR EXECUTIVE'S

ANNUAL PENSION BENEFIT ACCRUAL WHICH CAN NOT BE PAID UNDER ANY OTHER

QUALIFIED OR NON-QUALIFIED PENSION PLAN MAINTAINED BY BMI DUE TO OPERATION

OF VARIOUS RULES AND LIMITATIONS IN THE INTERNAL REVENUE CODE. AS OF

JANUARY 1, 2014, 100% PERCENT OF THE 457(F) PLAN ACCRUAL EARNED DURING A

YEAR IS PAID IN CASH TO THE OFFICERS OR EXECUTIVES AS SOON AS POSSIBLE

AFTER THE END OF THE YEAR. THE FULL AMOUNT OF THE 457(F) PLAN ACCRUAL WAS

REPORTED ON THE OFFICER'S OR EXECUTIVE'S 2014 FORM W-2. THE FOLLOWING 2014

ACCRUAL UNDER THE 457(F) PLAN IS INCLUDED IN THE AMOUNT OF COMPENSATION

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 7, and 8, and for Part II. Also complete this part for any additional information.

REPORTED IN COLUMN D OF PART VII AS APPLICABLE:

MICHAEL KLUSE \$44,498

BOBI GARRETT \$76,097

PART I, LINE 7:

SHORT AND LONG-TERM INCENTIVE COMPENSATION PROGRAMS ARE TIED TO CORPORATE
AND INDIVIDUAL PERFORMANCE.

SCHEDULE J SUPPLEMENTAL INFORMATION

DIRECTORS ARE PAID AS INDEPENDENT CONTRACTORS IN PART VII.

EMPLOYEE WELFARE BENEFITS AND FRINGE BENEFITS:

IN ADDITION TO THE COMPENSATION AND RETIREMENT PLANS OTHERWISE LISTED

IN PART VII, THOSE INDIVIDUALS REPORTED ON PART VII WHO ARE EMPLOYEES

OF BMI ARE ELIGIBLE TO PARTICIPATE IN BMI'S EMPLOYEE WELFARE BENEFIT

AND GROUP INSURANCE PLANS ON THE SAME TERMS AS ANY OTHER EMPLOYEE.

CONTRIBUTIONS TO EMPLOYEE WELFARE BENEFIT AND GROUP INSURANCE PLANS ARE

MADE IN AGGREGATE BASED UPON GROUP ACTUARIAL FACTORS AND HISTORICAL

CLAIMS EXPERIENCE AND APPORTIONING SPECIFIC DOLLAR AMOUNTS TO

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

INDIVIDUALS IS IMPRACTICAL. AS EMPLOYEES, SUCH INDIVIDUALS MAY ALSO

HAVE RECEIVED WORKING CONDITION FRINGE BENEFITS AND/OR DE MINIMIS

FRINGE BENEFITS AND/OR QUALIFIED MOVING EXPENSE REIMBURSEMENTS EXCLUDED

FROM INCOME UNDER INTERNAL REVENUE CODE SECTIONS

132(A)(3), 132(A)(4), AND 132(A)(6) RESPECTIVELY.

TRAVEL AND ENTERTAINMENT EXPENSE REIMBURSEMENT:

BMI'S EXECUTIVES INCUR VARIOUS TRAVEL AND ENTERTAINMENT EXPENSES IN THE

CONDUCT OF THEIR OFFICIAL DUTIES AS REPRESENTATIVES OF BMI. BMI HAS A

WRITTEN TRAVEL AND ENTERTAINMENT EXPENSE REIMBURSEMENT POLICY THAT

COMPLIES WITH PUBLISHED IRS GUIDANCE. ALL EXECUTIVES, INCLUDING THOSE

INDIVIDUALS REPORTED ON PART VII, ARE REQUIRED TO SUBSTANTIATE TRAVEL

AND ENTERTAINMENT EXPENSE IN ACCORDANCE WITH THAT POLICY. INTERNAL

AUDIT EXAMINES ALL EXPENSE REPORTS ASSOCIATED WITH DIRECTOR'S AND

OFFICER'S TRAVEL AND ENTERTAINMENT EXPENSES.

BMI'S TOTAL COMPENSATION PACKAGE CONSISTS OF BASE SALARIES OR HOURLY

RATES OF PAY, SHORT AND LONG-TERM INCENTIVE COMPENSATION PROGRAMS TIED

TO CORPORATE AND INDIVIDUAL PERFORMANCE; QUALIFIED DEFINED BENEFIT FOR

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

ELIGIBLE EMPLOYEES AND DEFINED CONTRIBUTION EMPLOYEE BENEFIT PLANS;

NONQUALIFIED PLANS AND CASH PAYMENT ARRANGEMENTS WHICH PROVIDE THE

ECONOMIC VALUE OF BENEFITS OTHERWISE PAYABLE UNDER THE NORMAL

PROVISIONS OF BMI'S QUALIFIED DEFINED BENEFIT AND DEFINED CONTRIBUTION

EMPLOYEE BENEFIT PLANS (QUALIFIED PLANS) BUT FOR OPERATION OF THE

INTERNAL REVENUE CODES LIMITATIONS UPON THE AMOUNT OF COMPENSATION

WHICH CAN BE TAKEN INTO ACCOUNT IN DETERMINING BENEFITS UNDER A

QUALIFIED PLAN, THE AMOUNT OF CONTRIBUTIONS WHICH CAN BE MADE TO A

QUALIFIED PLAN, AND/OR THE AMOUNT OF BENEFITS WHICH CAN BE PAID FROM A

QUALIFIED PLAN; VARIOUS EMPLOYEE WELFARE BENEFIT PLANS AND GROUP

INSURANCES; PAID LEAVE TIME; TUITION REIMBURSEMENT; AND MISCELLANEOUS

DE MINIMIS, WORKING CONDITION FRINGE BENEFITS, AND QUALIFIED MOVING

EXPENSE REIMBURSEMENTS.

DEFERRED COMPENSATION FROM RETIREMENT PLANS REPORTED IN SCHEDULE J.

PART II. COLUMN C REFLECTS THE IMPACT OF THE CHANGES IN THE DISCOUNT

RATE FROM 5.39% TO 4.58% AND ACTUARIAL IMPACTS OF SALARY GROWTH, AGE,

AND ADDITIONAL SERVICE AND OTHER ACTUARIAL FACTORS, THEREBY INCREASING

OR DECREASING THE AMOUNTS.

(Form 990 or 990-EZ)

► Complete if the organization answered "Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.

▶ Attach to Form 990 or Form 990-EZ.

► Information about Schedule L (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open To Public
Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

31-4379427

Battelle Memorial Institute		31-4
Part I	Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only).	

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

[illegible]

2 Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958

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

Part II	Loans to and/or From Interested Persons.
---------	--

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

[illegible]

	Q1	Q2	Q3	Q4	Total
Revenue	\$100	\$120	\$110	\$90	\$420
Cost of Sales	\$60	\$70	\$80	\$50	\$260
Gross Profit	\$40	\$50	\$30	\$40	\$160
Selling Expenses	\$10	\$12	\$11	\$9	\$42
Administrative Expenses	\$8	\$10	\$9	\$7	\$34
Depreciation	\$2	\$2	\$2	\$2	\$8
Interest Expense	\$1	\$1	\$1	\$1	\$4
Taxes	\$1	\$1	\$1	\$1	\$4
Net Income	\$18	\$24	\$16	\$20	\$78

Part III	Grants or Assistance Benefiting Interested Persons.
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Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

[illegible]

Part IV Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
360IP PTE, LTD.	JEFFREY WADSWORTH A	350,241	360IP PTE.		X
PRECISION CUSTOM COMPONENT	JOHN WELCH IS A DIR	173,817	BMI PAID PR		X
BLAKE KLUSE	FAMILY MEMBER OF MI	98,746	PAYROLL		X
DAVID KELLY	FAMILY MEMBER OF ST	324,074	PAYROLL		X

Part V Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: 360IP PTE, LTD.

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

JEFFREY WADSWORTH AND I MARTIN INGLIS ARE DIRECTORS

(D) DESCRIPTION OF TRANSACTION: 360IP PTE, LTD, PAID BMI FOR RESEARCH

SERVICES

(A) NAME OF PERSON: PRECISION CUSTOM COMPONENTS, LLC

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

JOHN WELCH IS A DIRECTOR

(D) DESCRIPTION OF TRANSACTION: BMI PAID PRECISION CUSTOM COMPONENTS,

LLC FOR PROJECT SERVICES

(A) NAME OF PERSON: BLAKE KLUSE

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

FAMILY MEMBER OF MICHAEL KLUSE

(A) NAME OF PERSON: DAVID KELLY

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

FAMILY MEMBER OF STEPHEN KELLY

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public
Inspection

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

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

BATTELLE MEMORIAL INSTITUTE ("BMI") IS ORGANIZED EXCLUSIVELY FOR

CHARITABLE, EDUCATIONAL AND SCIENTIFIC PURPOSES, INCLUDING THE

UTILIZATION OF SCIENCE, THE SCIENTIFIC METHOD AND RESEARCH FOR THE

BENEFIT AND EDUCATION OF MANKIND.

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

SOLUTIONS IN KEY AREAS OF SCIENCE, INCREASE THE AVAILABILITY OF CLEAN

AND ABUNDANT ENERGY, RESTORE AND PROTECT THE ENVIRONMENT, ENGAGE IN

EDUCATIONAL ACTIVITIES, AND CONTRIBUTE TO NATIONAL SECURITY.

FORM 990, PART V, LINE 4B, LIST OF FOREIGN COUNTRIES:

GEORGIA, INDIA, JAPAN, MALAYSIA,

SAUDI ARABIA, SINGAPORE, SOUTH KOREA, SWITZERLAND,

CHINA, UKRAINE, UNITED KINGDOM

FORM 990, PART VI, SECTION B, LINE 11:

A DETAILED ANALYSIS OF FORM 990 AND 990T AND FINAL COPIES OF EACH FORM ARE

PROVIDED TO EVERY MEMBER OF THE BOARD OF DIRECTORS PRIOR TO FILING, THE

AUDIT COMMITTEE OF THE BOARD OF DIRECTORS HOLDS A SPECIAL MEETING TO REVIEW

AND APPROVE THE FORMS FOR FILING. THE AUDIT COMMITTEE REPORTS ITS FINDINGS

AND CONCLUSIONS TO THE ENTIRE BOARD FOLLOWING THE COMMITTEE MEETING.

FORM 990, PART VI, SECTION B, LINE 12C:

EACH YEAR, BMI USES A DETAILED CONFLICT OF INTEREST CERTIFICATE TO OBTAIN

INFORMATION FROM DIRECTORS, OFFICERS AND ANY KEY EMPLOYEE. IN ADDITION

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

Schedule O (Form 990 or 990-EZ) (2014)

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

DIRECTORS AND OFFICERS PERIODICALLY UPDATE LISTS OF THEIR AFFILIATIONS WITH

OTHER ENTITIES. BMI PERIODICALLY DISTRIBUTES AN ETHICAL CODE OF CONDUCT

TRAINING COURSE THAT MUST BE REVIEWED AND SIGNED BY EVERY EMPLOYEE.

TRAINING WITH RESPECT TO SECTION 501(C)(3) COMPLIANCE REQUIREMENTS.

LIMITATIONS AND PROHIBITIONS, INCLUDING IMPROPER PRIVATE BENEFIT AND OTHER

CONFLICT OF INTEREST-RELATED MATTERS IS INCLUDED IN THE ETHICAL CODE OF

CONDUCT TRAINING COURSE THAT MUST BE REVIEWED AND ELECTRONICALLY SIGNED BY

EVERY EMPLOYEE. BMI MAINTAINS AN ETHICS HOT-LINE FOR ITS STAFF FOR USE WITH

RESPECT TO ANY ETHICS-RELATED MATTER, AND ALSO MAINTAINS A DEDICATED E-MAIL

BOX FOR USE WITH RESPECT TO SECTION 501(C)(3) RELATED MATTERS. MATTERS

REPORTED OR CONCERNS RAISED BY CONTACT WITH THE HOT-LINE OR THROUGH THE

E-MAIL BOX ARE GIVEN DUE CONSIDERATION AND INVESTIGATED APPROPRIATELY.

FORM 990, PART VI, SECTION B, LINE 15:

COMPENSATION POLICY:

BMI HAS A COMPREHENSIVE TOTAL COMPENSATION POLICY WHICH IT APPLIES TO ALL

EMPLOYEES. BMI'S POLICY IS TO COMPENSATE EACH EMPLOYEE IN A MANNER WHICH

IS EQUITABLE AND CONSISTENT WITH THE MARKET VALUE OF HIS/HER POSITION.

HIS/HER PERFORMANCE, AND COMPENSATION OF HIS/HER ASSOCIATES AND PEERS. THE

GOAL UNDERLYING BMI'S POLICY IS TO ATTRACT, RETAIN, AND REWARD THE

HIGH-QUALITY EMPLOYEES IT NEEDS TO CONTINUE AND ADVANCE ITS EXEMPT

PURPOSES.

IN IMPLEMENTING ITS POLICY, BMI RIGOROUSLY UTILIZES NATIONAL, REGIONAL, AND

LOCAL COMPENSATION SURVEYS AND BENCHMARKING OF OTHER ORGANIZATIONS TO

ESTABLISH MARKET-COMPARABILITY OF TOTAL COMPENSATION AND TAKES GREAT CARE

TO STRUCTURE COMPENSATION PROGRAMS TO COMPLY WITH ALL RELEVANT LEGAL, TAX

AND REGULATORY REQUIREMENTS, WHEN CONSIDERING AND APPROVING KEY EXECUTIVE

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

COMPENSATION, THE BMI BOARD OF DIRECTOR'S NORMAL PRACTICE IS TO FOLLOW

PROCEDURES WHICH ESTABLISH A REBUTTABLE PRESUMPTION OF REASONABLENESS

PURSUANT TO TREASURY REGULATION SECTION 53.4958-6.

FORM 990, PART VI, SECTION C, LINE 19:

BMI PROVIDES FORM 1023, APPLICATION FOR TAX EXEMPTION, ON REQUEST, FORM

1023 INCLUDES THE ARTICLES OF INCORPORATION AND THE CODE OF REGULATIONS.

THE CODE OF REGULATIONS IN FORM 1023 DOES NOT REFLECT THE RECENT CHANGES

MADE ON NOVEMBER 12, 2008. BMI MAKES FORMS 990 AND 990T AVAILABLE TO THE

PUBLIC FROM ITS WEB SITE. THE CONFLICT OF INTEREST POLICIES AND FINANCIAL

STATEMENTS ARE NOT MADE AVAILABLE TO THE PUBLIC.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

MARKET VALUE ADJUSTMENT ON MARKETABLE SECURITIES -30,516,038.

CURRENCY TRANSLATION ADJUSTMENT -176,225.

PENSION AND POST RETIREMENT BENEFITS -107,414,109.

NONCONTROLLING INTEREST -706,451.

DIVIDENDS

TOTAL TO FORM 990, PART XI, LINE 9 138,812,823.

FORM 990, PART I, LINE 7A

FORM 990 IS PREPARED ON GAAP FINANCIAL ACCOUNTING BASIS AND FORM 990T

IS PREPARED ON AN INCOME TAX ACCOUNTING BASIS. THEREFORE THERE ARE BOOK

TO TAX DIFFERENCES THAT ARE RECONCILED IN THE FOLLOWING SCHEDULE FOR

THE UNRELATED BUSINESS REVENUE TO FORM 990T, PART I, LINE 13, COLUMN C

FORM 990 UNRELATED BUSINESS REVENUE 48,105,283

DEDUCT INCOME TAX BASIS PARTNERSHIP LOSS 1,186,010

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number

31-4379427

DEDUCT THE COSTS OF GOODS SOLD 45,139,894

ADD INSURANCE PREMIUMS FROM TAXABLE SUBSIDIARIES 115,426

EQUALS TOTAL ON FORM 990T PART I, LINE 13, COLUMN C 1,894,805

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

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

▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

2014

Open to Public
Inspection

Name of the organization

BATTELLE MEMORIAL INSTITUTE

Employer identification number
31-4379427

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

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
BATTELLE NATIONAL BIODEFENSE INSTITUTE, LLC 04-3851808 8300 RESEARCH PLAZA, FREDERICK, MD 21702	MANAGEMENT OF NATIONAL LABORATORY	DELAWARE	41,241,195.	12,216,112.	BATTELLE MEMORIAL INSTITUTE
BATTELLE ENERGY ALLIANCE, LLC - 68-0588324 2525 N FREMONT AVE IDAHO FALLS, ID 83415	MANAGEMENT OF NATIONAL LABORATORY	DELAWARE	911,525,881.	8,521,732.	BATTELLE MEMORIAL INSTITUTE
BATTELLE ENERGY UK, LLC - 42-1767455 505 KING AVENUE COLUMBUS, OH 43201	MANAGEMENT OF NATIONAL LABORATORY	DELAWARE	0.	0.	BATTELLE MEMORIAL INSTITUTE

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
BATTELLE EDUCATION - 46-0585021 505 KING AVENUE COLUMBUS, OH 43201	PROMOTE STEM EDUCATION	OHIO	501(C)(3)	11(A)I	BATTELLE MEMORIAL INSTITUTE		X

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

Schedule R (Form 990) 2014

Part IV Continuation of Identification of Related Organizations Taxable as a Corporation or Trust

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 528(b)(3) controlled entity?	
								Yes	No
3601P PTE LTD - 20-0817081									
391B ORCHARD ROAD #16-03/04	OTHER INVESTMENT		BATTELLE	C CORP	404,479.	596,524.	71.05%	X	
NGEE ANN CITY TOWER B, SINGAPORE 238874	HOLDING COMPANY	SINGAPORE	BATTELLE	C CORP					
BATTELLE ARABIA FOR SCIENCE & TECHNOLOGY									
AL-AKARIA PLAZA, LEVEL 6, NORTH WING, GATE D,									
RIYADH, SAUDI ARABIA 11673	SCIENTIFIC RESEARCH	SAUDI ARABIA	MEMORIAL INSTITUTE	C CORP	23,199.	116,815.	100.00%	X	
BATTELLE INSTITUTE (DELAWARE) - 31-4379427									
505 KING AVENUE	HOLDING COMPANY		BATTELLE						
COLUMBUS, OH 43201	(DORMANT)	DE	INSTITUTE	C CORP	0.	0.	100.00%	X	
BATTELLE INSTITUTE E.V.									
FRANKFURT AM MAIN	SCIENTIFIC RESEARCH		BATTELLE						
FRANKFURT, GERMANY	(DORMANT)	GERMANY	INSTITUTE	C CORP	0.	0.	100.00%	X	
BATTELLE JAPAN CORPORATION									
2-CHOME UCHISAIWAI-CHO CHIYODA-KU									
TOKYO, JAPAN	SCIENTIFIC RESEARCH	JAPAN	INSTITUTE	C CORP	411,670.	90,839.	60.00%	X	
BATTELLE OKLAHOMA LLC - 20-0292062									
505 KING AVENUE	REAL ESTATE		BATTELLE						
COLUMBUS, OH 43201	ACTIVITIES	OK	INSTITUTE	C CORP	248,712.	342,866.	100.00%	X	
BATTELLE SCIENCE & TECHNOLOGY INDIA PVT. LTD									
UNIT 302 PANCHSHIL TECH PARK									
HINJEWADI, PUNE, INDIA 411057	SCIENTIFIC RESEARCH	INDIA	INSTITUTE	C CORP	149,888.	38,032.	100.00%	X	
BATTELLE SERVICES COMPANY INC. - 31-1792334									
505 KING AVENUE			BATTELLE						
COLUMBUS, OH 43201	EMPLOYEE LEASING	OH	INSTITUTE	C CORP	1,204,822.	2,081,904.	100.00%	X	
BATTELLE UK LIMITED									
29 SPRINGFIELD LYONS APPROACH									
CHELSEFORD ESSEX, UNITED KINGDOM CM2 5LB	SCIENTIFIC RESEARCH	UNITED KINGDOM	INSTITUTE	C CORP	14,900,762.	19,044,571.	100.00%	X	
B-C JV LLC - 47-1470805									
1204 TECHNOLOGY DRIVE			BATTELLE						
ABERDEEN, MD 21004	SCIENTIFIC RESEARCH	MD	INSTITUTE	C CORP	0.	0.	70.00%	X	
BLUEFIN ROBOTICS CORPORATION - 20-2576696									
237 PUTNAM AVE.									
CAMBRIDGE, MA 02139	MARINE ROBOTICS	MA	INSTITUTE	C CORP	2,795,098.	26,323,410.	100.00%	X	
BLUEFIN ROBOTICS UK HOLDINGS, LTD -									
98-1140866, ORCHARD BRAE HOUSE QUEENSPERRY									
RD, EDINBURGH, UNITED KINGDOM	HOLDING COMPANY	UNITED KINGDOM	ROBOTICS CORPORATION	C CORP	466,976.	25,292,818.	100.00%	X	

Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity	X	
b Gift, grant, or capital contribution to related organization(s)	X	
c Gift, grant, or capital contribution from related organization(s)		X
d Loans or loan guarantees to or for related organization(s)	X	
e Loans or loan guarantees by related organization(s)		X
f Dividends from related organization(s)		X
g Sale of assets to related organization(s)		X
h Purchase of assets from related organization(s)		X
i Exchange of assets with related organization(s)		X
j Lease of facilities, equipment, or other assets to related organization(s)		X
k Lease of facilities, equipment, or other assets from related organization(s)		X
l Performance of services or membership or fundraising solicitations for related organization(s)	X	
m Performance of services or membership or fundraising solicitations by related organization(s)	X	
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	X	
o Sharing of paid employees with related organization(s)	X	
p Reimbursement paid to related organization(s) for expenses		X
q Reimbursement paid by related organization(s) for expenses		X
r Other transfer of cash or property to related organization(s)		X
s Other transfer of cash or property from related organization(s)		X

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

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) 360IP CORPORATION-SPECIFIED PAYMENT	A	203,688.FMV	
(2) BATTELLE ARABIA-SPECIFIED PAYMENT	A	8,500.FMV	
(3) BATTELLE JAPAN-SPECIFIED PAYMENT	A	111,722.FMV	
(4) BATTELLE OKLAHOMA LLC-SPECIFIED PAYMENT	A	1,284.FMV	
(5) BATTELLE UK LIMITED-SPECIFIED PAYMENT	A	88,735.FMV	
(6) BLUEFIN ROBOTICS-SPECIFIED PAYMENT	A	2,442,363.FMV	

Part V Continuation of Transactions With Related Organizations (Schedule R (Form 990), Part V, line 2)

(a) Name of other organization	(b) Transaction type (a-r)	(c) Amount involved	(d) Method of determining amount involved
(7)GEOSAFE CORPORATION-SPECIFIED PAYMENT	A	115,494.FMV	
(8)THE HEALTHCARE COLLOQUIUM-SPECIFIED PAYMENT	A	805,519.FMV	
(9)VITEX SYSTEMS INC-SPECIFIED PAYMENT	A	16,930.FMV	
(10)VITEX SYSTEMS INC-QUALIFYING SPECIFIED PAYMENT	A	138,318.FMV	
(11)BATTTELLE SERVICES COMPANY INC	B	1,250,000.FMV	
(12)BATTTELLE JAPAN CORPORATION	D	250,000.FMV	
(13)BLUEFIN ROBOTICS CORPORATION	D	9,026,000.FMV	
(14)THE HEALTHCARE COLLOQUIUM INC	D	3,825,000.FMV	
(15)VITEX SYSTEMS INC	D	425,000.FMV	
(16)360IP PTE LTD	L	138,398.FMV	
(17)BATTTELLE SERVICES COMPANY INC	L	114,456.FMV	
(18)THE HEALTHCARE COLLOQUIUM INC	L	524,175.FMV	
(19)VITEX SYSTEMS INC	L	50,948.FMV	
(20)WINNER WATER SERVICES INC	L	268,419.FMV	
(21)BATTTELLE SERVICES COMPANY INC	M	768,375.FMV	
(22)BATTTELLE UK LIMITED	M	1,038,769.FMV	
(23)BLUEFIN ROBOTICS CORPORATION	M	307,255.FMV	
(24)RESEARCH INSURANCE COMPANY LTD	M	2,355,599.FMV	

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R (see instructions).

SCHEDULE R, PART V

DURING FISCAL YEAR 2015, BMI RELATED ENTITIES PROVIDED CONTRACT

SCIENTIFIC RESEARCH AND DEVELOPMENT AND TECHNICAL SERVICES IN THE

ORDINARY COURSE OF BUSINESS UNDER ARMS-LENGTH TERMS, CONDITIONS, AND

PRICING, SERVICES TO BMI AND BMI'S JAPAN, INDIA, SAUDI ARABIA,

SINGAPORE, AND UNITED KINGDOM AFFILIATES WERE PROVIDED UNDER

ARMS-LENGTH TERMS AND AT PRICING WHICH COMPLIED WITH THE INTER-COMPANY

TRANSFER PRICING RULES OF JAPAN, INDIA, SAUDI ARABIA, SINGAPORE, UNITED

KINGDOM, AND THE UNITED STATES. BMI ENGAGED IN TRANSACTIONS WITH

RELATED ENTITIES SUCH AS: THE LEASING OF REAL OR PERSONAL PROPERTY;

THE PROVISION OF CAPITAL; AND, THE FURNISHING OF GOODS, SERVICES OR

FACILITIES. ALL TRANSACTIONS WITH TAXABLE RELATED ENTITIES WERE

CONDUCTED AT FAIR MARKET VALUE RATES AND ARE IN ACCORDANCE WITH

INTERNAL REVENUE CODE SECTION 482 AND OTHER APPLICABLE INTER-COMPANY

TRANSFER PRICING RULES. THESE TRANSACTIONS HAVE BEEN APPROVED AND

DOCUMENTED AND CONDUCTED IN THE ORDINARY COURSE OF BUSINESS.

SCHEDULE R, PART V, LINE 1A

QUALIFYING SPECIFIED PAYMENTS AND SPECIFIED PAYMENTS RELATED TO IRS

SECTION 512(B)(13) PERTAINING TO 990T PAGE 1, PART I, LINE 8

QUALIFYING SPECIFIED PAYMENTS \$138,318

SPECIFIED PAYMENTS \$3,796,795

TOTAL \$3,935,113

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R (see instructions).

SCHEDULE R, PART VI

BMI IS REQUIRED TO CONSOLIDATE THESE ENTITIES FOR FINANCIAL ACCOUNTING

PURPOSES AND ACCORDINGLY, THEIR FINANCIAL ATTRIBUTES ARE REFLECTED IN

THE REVENUES AND EXPENSES AND OTHER FINANCIAL INFORMATION IN THIS FORM

AND RELATED SCHEDULES.

SCHEDULE R, PART V, LINE 1M AND 1N

BMI SHARES EMPLOYEES, FACILITIES, AND EQUIPMENT WITH BATTELLE

EDUCATION.

Form 990-T

RETURN EXTENDED UNTIL AUGUST 15, 2016

Exempt Organization Business Income Tax Return
(and proxy tax under section 6033(e))

OMB No. 1545-0087

For calendar year 2014 or other tax year beginning OCT 1, 2014, and ending SEP 30, 2015

▶ Information about Form 990-T and its instructions is available at www.irs.gov/form990t.

▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

2014

Open to Public Inspection for 501(c)(3) Organizations Only

Department of the Treasury
Internal Revenue ServiceA ☐ Check box if
address changedName of organization (☐ Check box if name changed and see instructions.)D Employer identification number
(Employees' trust, see
instructions.)

B Exempt under section

Print
or
Type

BATELLE MEMORIAL INSTITUTE

31-4379427

☒ 501(c)(3)

Number, street, and room or suite no. If a P.O. box, see instructions.

E Unrelated business activity codes
(See instructions.)☐ 408(e) ☐ 220(e)

505 KING AVENUE

☐ 408A ☐ 530(a)

City or town, state or province, country, and ZIP or foreign postal code

541700

☐ 529(a)

COLUMBUS, OH 43201-2693

C Book value of all assets
at end of year

F Group exemption number (See instructions.)

1,125,324,072

G Check organization type ☒ 501(c) corporation ☐ 501(c) trust ☐ 401(a) trust ☐ Other trust

H Describe the organization's primary unrelated business activity. ▶ SCIENTIFIC RESEARCH AND DEVELOPMENT

I During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? ▶ ☐ Yes ☒ No

If "Yes," enter the name and identifying number of the parent corporation. ▶

J The books are in care of ▶ DAVID C. EVANS

Telephone number ▶ 614-424-4777

Part I Unrelated Trade or Business Income

(A) Income

(B) Expenses

(C) Net

1a	Gross receipts or sales	45,877,450.			
b	Less returns and allowances		c Balance ▶	1c	45,877,450.
2	Cost of goods sold (Schedule A, line 7)			2	45,139,894.
3	Gross profit. Subtract line 2 from line 1c			3	737,556.
4a	Capital gain net income (attach Schedule D)			4a	
b	Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797)			4b	
c	Capital loss deduction for trusts			4c	
5	Income (loss) from partnerships and S corporations (attach statement)			5	-1,186,010.
6	Rent income (Schedule C)			6	STMT 1
7	Unrelated debt-financed income (Schedule E)			7	
8	Interest, annuities, royalties, and rents from controlled organizations (Sch. F)			8	3,794,235.
9	Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G)			9	1,566,402.
10	Exploited exempt activity income (Schedule I)			10	
11	Advertising income (Schedule J)			11	
12	Other income (See instructions; attach schedule) SEE STATEMENT 2			12	115,426.
13	Total. Combine lines 3 through 12			13	3,461,207.
					1,566,402.
					1,894,805.

Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions.)

(Except for contributions, deductions must be directly connected with the unrelated business income.)

14	Compensation of officers, directors, and trustees (Schedule K)		14	
15	Salaries and wages		15	
16	Repairs and maintenance		16	
17	Bad debts		17	
18	Interest (attach schedule)		18	
19	Taxes and licenses		19	
20	Charitable contributions (See instructions for limitation rules)		20	
21	Depreciation (attach Form 4562)	21		
22	Less depreciation claimed on Schedule A and elsewhere on return	22a	22b	
23	Depletion		23	
24	Contributions to deferred compensation plans		24	
25	Employee benefit programs		25	
26	Excess exempt expenses (Schedule I)		26	
27	Excess readership costs (Schedule J)		27	
28	Other deductions (attach schedule) SEE STATEMENT 3		28	1,867,925.
29	Total deductions. Add lines 14 through 28		29	1,867,925.
30	Unrelated business taxable income before net operating loss deduction. Subtract line 29 from line 13		30	26,880.
31	Net operating loss deduction (limited to the amount on line 30) SEE STATEMENT 4		31	26,880.
32	Unrelated business taxable income before specific deduction. Subtract line 31 from line 30		32	0.
33	Specific deduction (Generally \$1,000, but see line 33 instructions for exceptions)		33	1,000.
34	Unrelated business taxable income. Subtract line 33 from line 32. If line 33 is greater than line 32, enter the smaller of zero or line 32		34	0.

423701
01-13-15

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-T (2014)

Part III Tax Computation

35 Organizations Taxable as Corporations. See instructions for tax computation.

Controlled group members (sections 1561 and 1563) check here ☒ See instructions and:

a Enter your share of the \$50,000, \$25,000, and \$9,925,000 taxable income brackets (in that order):

(1) \$ 0 (2) \$ 0 (3) \$ 0

b Enter organization's share of: (1) Additional 5% tax (not more than \$11,750) \$ 0

(2) Additional 3% tax (not more than \$100,000) \$ 0

c Income tax on the amount on line 34 35c 0

36 Trusts Taxable at Trust Rates. See instructions for tax computation. Income tax on the amount on line 34 from:

☐ Tax rate schedule or ☐ Schedule D (Form 1041)

36

37 Proxy tax. See instructions

37

38 Alternative minimum tax

38

39 Total. Add lines 37 and 38 to line 35c or 36, whichever applies

39 0

Part IV Tax and Payments

40a Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116)

40a

b Other credits (see instructions)

40b

c General business credit. Attach Form 3800

40c

d Credit for prior year minimum tax (attach Form 8801 or 8827)

40d

e Total credits. Add lines 40a through 40d

40e

41 Subtract line 40e from line 39

41 0

42 Other taxes. Check if from: ☐ Form 4255 ☐ Form 8611 ☐ Form 8697 ☐ Form 8866 ☐ Other (attach schedule)

42

43 Total tax. Add lines 41 and 42

43 0

44a Payments: A 2013 overpayment credited to 2014

44a 30,347

b 2014 estimated tax payments

44b 40,000

c Tax deposited with Form 8868

44c

d Foreign organizations: Tax paid or withheld at source (see instructions)

44d

e Backup withholding (see instructions)

44e

f Credit for small employer health insurance premiums (Attach Form 8941)

44f

g Other credits and payments:

☐ Form 2439☐ Form 4136☐ Other

Total

44g

45 Total payments. Add lines 44a through 44g

45 70,347

46 Estimated tax penalty (see instructions). Check if Form 2220 is attached ☐

46

47 Tax due. If line 45 is less than the total of lines 43 and 46, enter amount owed

47

48 Overpayment. If line 45 is larger than the total of lines 43 and 46, enter amount overpaid

48 70,347

49 Enter the amount of line 48 you want: Credited to 2015 estimated tax

70,347

Refunded

49 0

Part V Statements Regarding Certain Activities and Other Information (see instructions)

1 At any time during the 2014 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If YES, the organization may have to file Form FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If YES, enter the name of the foreign country here

Yes No

SEE STATEMENT 5

X

2 During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If YES, see instructions for other forms the organization may have to file.

X

3 Enter the amount of tax-exempt interest received or accrued during the tax year \$

Schedule A - Cost of Goods Sold. Enter method of inventory valuation ☒ N/A

1 Inventory at beginning of year

1 0

2 Purchases

2

3 Cost of labor

3

4a Additional section 263A costs (att. schedule)

4a

b Other costs (attach schedule)

4b 45,139,894

5 Total. Add lines 1 through 4b

5 45,139,894

6 Inventory at end of year

6 0

7 Cost of goods sold. Subtract line 6

from line 5. Enter here and in Part I, line 2

7 45,139,894

8 Do the rules of section 263A (with respect to

property produced or acquired for resale) apply to

the organization?

Yes No

X

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 taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer

Date 8/5/2014

Title ASST TREASURER

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No**Paid Preparer Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name

Firm's EIN

Firm's address

Phone no.

Schedule C - Rent Income (From Real Property and Personal Property Leased With Real Property)(see instructions)

1. Description of property

(1)
(2)
(3)
(4)

2. Rent received or accrued		3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule)
(a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%)	(b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income)	
(1)		
(2)		
(3)		
(4)		
Total 0.	Total 0.	

(c) **Total income.** Add totals of columns 2(a) and 2(b). Enter here and on page 1, Part I, line 6, column (A)(b) **Total deductions.**

Enter here and on page 1, Part I, line 8, column (B)

0.

Schedule E - Unrelated Debt-Financed Income (see instructions)

1. Description of debt-financed property		2. Gross income from or allocable to debt-financed property	3. Deductions directly connected with or allocable to debt-financed property	
			(a) Straight line depreciation (attach schedule)	(b) Other deductions (attach schedule)
(1)				
(2)				
(3)				
(4)				
4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule)	5. Average adjusted basis of or allocable to debt-financed property (attach schedule)	6. Column 4 divided by column 5	7. Gross income reportable (column 2 x column 6)	8. Allocable deductions (column 6 x total of columns 3(a) and 3(b))
(1)		%		
(2)		%		
(3)		%		
(4)		%		

Enter here and on page 1, Part I, line 7, column (A).

Enter here and on page 1, Part I, line 7, column (B).

Totals

0.

Total dividends-received deductions included in column 8

0.

Schedule F - Interest, Annuities, Royalties, and Rents From Controlled Organizations (see instructions)

1. Name of controlled organization		2. Employer identification number	Exempt Controlled Organizations			
			3. Net unrelated income (loss) (see instructions)	4. Total of specified payments made	5. Part of column 4 that is included in the controlling organization's gross income	6. Deductions directly connected with income in column 5
(1)						
(2)						
(3)						
(4)	SEE STATEMENT 7					

Nonexempt Controlled Organizations

7. Taxable income	8. Net unrelated income (loss) (see instructions)	9. Total of specified payments made	10. Part of column 9 that is included in the controlling organization's gross income	11. Deductions directly connected with income in column 10
(1)				SEE STATEMENT 8
(2)				
(3)				
(4)				

Add columns 5 and 10. Enter here and on page 1, Part I, line 8, column (A).

Add columns 6 and 11. Enter here and on page 1, Part I, line 8, column (B).

Totals

3,794,235.

1,566,402.

Schedule G - Investment Income of a Section 501(c)(7), (9), or (17) Organization
(see instructions)

1. Description of income	2. Amount of income	3. Deductions directly connected (attach schedule)	4. Set-asides (attach schedule)	5. Total deductions and set-asides (col. 3 plus col. 4)
(1)				
(2)				
(3)				
(4)				
		Enter here and on page 1, Part I, line 9, column (A).		Enter here and on page 1, Part I, line 9, column (B).
Totals		0.		0.

Schedule I - Exploited Exempt Activity Income, Other Than Advertising Income
(see instructions)

1. Description of exploited activity	2. Gross unrelated business income from trade or business	3. Expenses directly connected with production of unrelated business income	4. Net income (loss) from unrelated trade or business (column 2 minus column 3). If a gain, compute cols. 5 through 7.	5. Gross income from activity that is not unrelated business income	6. Expenses attributable to column 5	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4).
(1)						
(2)						
(3)						
(4)						
		Enter here and on page 1, Part I, line 10, col. (A).	Enter here and on page 1, Part I, line 10, col. (B).			Enter here and on page 1, Part II, line 26.
Totals		0.	0.			0.

Schedule J - Advertising Income (see instructions)**Part I Income From Periodicals Reported on a Consolidated Basis**

1. Name of periodical	2. Gross advertising income	3. Direct advertising costs	4. Advertising gain or (loss) (col. 2 minus col. 3). If a gain, compute cols. 5 through 7.	5. Circulation income	6. Readership costs	7. Excess readership costs (column 6 minus column 5, but not more than column 4).
(1)						
(2)						
(3)						
(4)						
Totals (carry to Part II, line (5))		0.	0.			0.

Part II Income From Periodicals Reported on a Separate Basis (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis.)

1. Name of periodical	2. Gross advertising income	3. Direct advertising costs	4. Advertising gain or (loss) (col. 2 minus col. 3). If a gain, compute cols. 5 through 7.	5. Circulation income	6. Readership costs	7. Excess readership costs (column 6 minus column 5, but not more than column 4).
(1)						
(2)						
(3)						
(4)						
Totals from Part I		0.	0.			0.
		Enter here and on page 1, Part I, line 11, col. (A).	Enter here and on page 1, Part I, line 11, col. (B).			Enter here and on page 1, Part II, line 27.
Totals, Part II (lines 1-5)		0.	0.			0.

Schedule K - Compensation of Officers, Directors, and Trustees (see instructions)

1. Name	2. Title	3. Percent of time devoted to business	4. Compensation attributable to unrelated business
(1)		%	
(2)		%	
(3)		%	
(4)		%	
Total. Enter here and on page 1, Part II, line 14			0.

**SCHEDULE O
(Form 1120)**

(Rev. December 2012)
Department of the Treasury
Internal Revenue Service

**Consent Plan and Apportionment Schedule
for a Controlled Group**

▶ Attach to Form 1120, 1120-C, 1120-F, 1120-FSC, 1120-L, 1120-PC, 1120-REIT, or 1120-RIC.
▶ Information about Schedule O (Form 1120) and its instructions is available at www.irs.gov/form1120.

OMB No. 1545-0123

Name

Employer identification number

BATTELLE MEMORIAL INSTITUTE

31-4379427

Part I Apportionment Plan Information

1 Type of controlled group:

- a ☒ Parent-subsidiary group
b ☐ Brother-sister group
c ☐ Combined group
d ☐ Life insurance companies only

2 This corporation has been a member of this group:

- a ☒ For the entire year.
b ☐ From _____, until _____.

3 This corporation consents and represents to:

- a ☐ Adopt an apportionment plan. All the other members of this group are adopting an apportionment plan effective for the current tax year which ends on _____, and for all succeeding tax years.
b ☒ Amend the current apportionment plan. All the other members of this group are currently amending a previously adopted plan, which was in effect for the tax year ending DECEMBER 31, 2014, and for all succeeding tax years.
c ☐ Terminate the current apportionment plan and not adopt a new plan. All the other members of this group are not adopting an apportionment plan.
d ☐ Terminate the current apportionment plan and adopt a new plan. All the other members of this group are adopting an apportionment plan effective for the current tax year which ends on _____, and for all succeeding tax years.

4 If you checked box 3c or 3d above, check the applicable box below to indicate if the termination of the current apportionment plan was:

- a ☐ Elected by the component members of the group.
b ☐ Required for the component members of the group.

5 If you did not check a box on line 3 above, check the applicable box below concerning the status of the group's apportionment plan (see instructions).

- a ☐ No apportionment plan is in effect and none is being adopted.
b ☐ An apportionment plan is already in effect. It was adopted for the tax year ending _____, and for all succeeding tax years.

6 If all the members of this group are adopting a plan or amending the current plan for a tax year after the due date (including extensions) of the tax return for this corporation, is there at least one year remaining on the statute of limitations from the date this corporation filed its amended return for such tax year for assessing any resulting deficiency? See instructions. N/A

- a ☐ Yes.
(i) ☐ The statute of limitations for this year will expire on _____.
(ii) ☐ On _____, this corporation entered into an agreement with the Internal Revenue Service to extend the statute of limitations for purposes of assessment until _____.
b ☐ No. The members may not adopt or amend an apportionment plan.

7 Required information and elections for component members. Check the applicable box(es) (see instructions).

- a ☐ The corporation will determine its tax liability by applying the maximum tax rate imposed by section 11 to the entire amount of its taxable income.
b ☐ The corporation and the other members of the group elect the FIFO method (rather than defaulting to the proportionate method) for allocating the additional taxes for the group imposed by section 11(b)(1).
c ☐ The corporation has a short tax year that does not include December 31.

For Paperwork Reduction Act Notice, see Instructions for Form 1120.

Schedule O (Form 1120) (Rev. 12-2012)

Part II Taxable Income Apportionment (See instructions)**Caution:** Each total in Part II, column (g) for each component member must equal taxable income from Form 1120, page 1, line 30 or the comparable line of such member's tax return.

(a) Group member's name and employer identification number		(b) Tax year end (Yr-Mo)	Taxable Income Amount Allocated to Each Bracket					(g) Total (add columns (c) through (f))
			(c) 15%	(d) 25%	(e) 34%	(f) 35%		
1	BATTELLE MEMORIAL INSTITUTE	31-4379427	0.	0.	0.		0	
2	BATTELLE OKLAHOMA, LLC	20-0292062	50,000.	25,000.	159,175.		234,175.	
3	BATTELLE SERVICES COMPANY, INC.	31-1792334	0.	0.	0.		0.	
4	THE HEALTHCARE COLLOQUIUM, INC.	26-2347432	0.	0.	0.		0.	
5	GEOSAFE CORPORATION	91-1404268	0.	0.	0.		0.	
6	SCIENTIFIC ADVANCES, INC.	31-6024333	0.	0.	0.		0.	
7	VITEX SYSTEMS, INC.	77-0526364	0.	0.	0.		0.	
8	BLUEFIN ROBOTIC CORPORATION	20-2576696	0.	0.	0.		0.	
9								
10								
11								
12								
Total			50,000.	25,000.	159,175.		234,175.	

Schedule O (Form 1120) (Rev. 12-2012)

Part III Income Tax Apportionment (See instructions)

	(a) Group member's name	Income Tax Apportionment						(g) 3%	(h) Total income tax (combine lines (b) through (g))
		(b) 15%	(c) 25%	(d) 34%	(e) 35%	(f) 5%			
1	BATTELLE MEMORIAL INSTITUTE	0.	0.	0.		0.		0.	
2	BATTELLE OKLAHOMA, LLC	7,500.	6,250.	54,120.		6,709.			74,579.
3	BATTELLE SERVICES COMPANY, INC.	0.	0.	0.		0.		0.	
4	THE HEALTHCARE COLLOQUIUM, INC.	0.	0.	0.		0.		0.	
5	GEOSAFE CORPORATION	0.	0.	0.		0.		0.	
6	SCIENTIFIC ADVANCES, INC.	0.	0.	0.		0.		0.	
7	VITEX SYSTEMS, INC.	0.	0.	0.		0.		0.	
8	BLUEFIN ROBOTIC CORPORATION	0.	0.	0.		0.		0.	
9									
10									
11									
12									
Total		7,500.	6,250.	54,120.		6,709.			74,579.

Schedule O (Form 1120) (Rev. 12-2012)

Schedule O (Form 1120) (Rev. 12-2012)

Part IV Other Apportionments (See instructions)

	(a) Group member's name	Other Apportionments				
		(b) Accumulated earnings credit	(c) AMT exemption amount	(d) Phaseout of AMT exemption amount	(e) Penalty for failure to pay estimated tax	(f) Other
1	BATTELLE MEMORIAL INSTITUTE		39,950.	150,000.		
2						
3	BATTELLE OKLAHOMA, LLC					
4	BATTELLE SERVICES COMPANY, INC.					
5	THE HEALTHCARE COLLOQUIUM, INC.					
6	GEOSAFE CORPORATION					
7	SCIENTIFIC ADVANCES, INC.		50.			
8	VITEX SYSTEMS, INC.					
9	BLUEFIN ROBOTIC CORPORATION					
10						
11						
12						
Total			40,000.	150,000.		

Schedule O (Form 1120) (Rev. 12-2012)

Alternative Minimum Tax - Corporations

▶ Attach to the corporation's tax return.

▶ Information about Form 4626 and its separate instructions is at www.irs.gov/form4626.

OMB No. 1545-0123

2014

Name		Employer identification number
BATTELLE MEMORIAL INSTITUTE		31-4379427
Note: See the instructions to find out if the corporation is a small corporation exempt from the alternative minimum tax (AMT) under section 55(e).		
1	Taxable income or (loss) before net operating loss deduction	25,880.
2	Adjustments and preferences:	
a	Depreciation of post-1986 property	2a
b	Amortization of certified pollution control facilities	2b
c	Amortization of mining exploration and development costs	2c
d	Amortization of circulation expenditures (personal holding companies only)	2d
e	Adjusted gain or loss	2e
f	Long-term contracts	2f
g	Merchant marine capital construction funds	2g
h	Section 833(b) deduction (Blue Cross, Blue Shield, and similar type organizations only)	2h
i	Tax shelter farm activities (personal service corporations only)	2i
j	Passive activities (closely held corporations and personal service corporations only)	2j
k	Loss limitations	2k
l	Depletion	2l
m	Tax-exempt interest income from specified private activity bonds	2m
n	Intangible drilling costs	2n
o	Other adjustments and preferences	2o
3	Pre-adjustment alternative minimum taxable income (AMTI). Combine lines 1 through 2o	25,880.
4	Adjusted current earnings (ACE) adjustment:	
a	ACE from line 10 of the ACE worksheet in the instructions	4a 25,880.
b	Subtract line 3 from line 4a. If line 3 exceeds line 4a, enter the difference as a negative amount (see instructions)	4b 0.
c	Multiply line 4b by 75% (.75). Enter the result as a positive amount	4c
d	Enter the excess, if any, of the corporation's total increases in AMTI from prior year ACE adjustments over its total reductions in AMTI from prior year ACE adjustments (see instructions). Note: You must enter an amount on line 4d (even if line 4b is positive)	4d
e	ACE adjustment. • If line 4b is zero or more, enter the amount from line 4c • If line 4b is less than zero, enter the smaller of line 4c or line 4d as a negative amount	4e 0.
5	Combine lines 3 and 4e. If zero or less, stop here; the corporation does not owe any AMT	5 25,880.
6	Alternative tax net operating loss deduction (see instructions) SEE STATEMENT 9	6 23,292.
7	Alternative minimum taxable income. Subtract line 6 from line 5. If the corporation held a residual interest in a REMIC, see instructions	7 2,588.
8	Exemption phase-out (if line 7 is \$310,000 or more, skip lines 8a and 8b and enter -0- on line 8c):	
a	Subtract \$150,000 from line 7 (if completing this line for a member of a controlled group, see instructions). If zero or less, enter -0-	8a 0.
b	Multiply line 8a by 25% (.25)	8b 0.
c	Exemption. Subtract line 8b from \$40,000 (if completing this line for a member of a controlled group, see instructions). If zero or less, enter -0-	8c 39,950.
9	Subtract line 8c from line 7. If zero or less, enter -0-	9 0.
10	Multiply line 9 by 20% (.20)	10 0.
11	Alternative minimum tax foreign tax credit (AMTFTC) (see instructions)	11
12	Tentative minimum tax. Subtract line 11 from line 10	12 0.
13	Regular tax liability before applying all credits except the foreign tax credit	13
14	Alternative minimum tax. Subtract line 13 from line 12. If zero or less, enter -0-. Enter here and on Form 1120, Schedule J, line 3, or the appropriate line of the corporation's income tax return	14 0.

*WA For Paperwork Reduction Act Notice, see separate instructions.

Form 4626 (2014)

Adjusted Current Earnings (ACE) Worksheet

▶ See ACE Worksheet Instructions.

1	Pre-adjustment AMTI. Enter the amount from line 3 of Form 4626	1	25,880.
2	ACE depreciation adjustment:		
a	AMT depreciation	2a	
b	ACE depreciation:		
(1)	Post-1993 property	2b(1)	
(2)	Post-1989, pre-1994 property	2b(2)	
(3)	Pre-1990 MACRS property	2b(3)	
(4)	Pre-1990 original ACRS property	2b(4)	
(5)	Property described in sections 168(f)(1) through (4)	2b(5)	
(6)	Other property	2b(6)	
(7)	Total ACE depreciation. Add lines 2b(1) through 2b(6)	2b(7)	
c	ACE depreciation adjustment. Subtract line 2b(7) from line 2a	2c	
3	Inclusion in ACE of items included in earnings and profits (E&P):		
a	Tax-exempt interest income	3a	
b	Death benefits from life insurance contracts	3b	
c	All other distributions from life insurance contracts (including surrenders)	3c	
d	Inside buildup of undistributed income in life insurance contracts	3d	
e	Other items (see Regulations sections 1.56(g)-1(c)(6)(iii) through (ix) for a partial list)	3e	
f	Total increase to ACE from inclusion in ACE of items included in E&P. Add lines 3a through 3e	3f	
4	Disallowance of items not deductible from E&P:		
a	Certain dividends received	4a	
b	Dividends paid on certain preferred stock of public utilities that are deductible under section 247	4b	
c	Dividends paid to an ESOP that are deductible under section 404(k)	4c	
d	Nonpatronage dividends that are paid and deductible under section 1382(c)	4d	
e	Other items (see Regulations sections 1.56(g)-1(d)(3)(i) and (ii) for a partial list)	4e	
f	Total increase to ACE because of disallowance of items not deductible from E&P. Add lines 4a through 4e	4f	
5	Other adjustments based on rules for figuring E&P:		
a	Intangible drilling costs	5a	
b	Circulation expenditures	5b	
c	Organizational expenditures	5c	
d	LIFO inventory adjustments	5d	
e	Installment sales	5e	
f	Total other E&P adjustments. Combine lines 5a through 5e	5f	
6	Disallowance of loss on exchange of debt pools	6	
7	Acquisition expenses of life insurance companies for qualified foreign contracts	7	
8	Depletion	8	
9	Basis adjustments in determining gain or loss from sale or exchange of pre-1994 property	9	
10	Adjusted current earnings. Combine lines 1, 2c, 3f, 4f, and 5f through 9. Enter the result here and on line 4a of Form 4626	10	25,880.

FORM 990-T	INCOME (LOSS) FROM PARTNERSHIPS AND S CORPORATIONS	STATEMENT 1
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DESCRIPTION	AMOUNT
ALLIANCE BERNSTEIN HOLDING L.P.	-16,681.
AMERIGAS PARTNERS L.P.	-5,235.
BLUE POINT CAPITAL PARTNERS III L.P.	-121,391.
CHART VENTURES PARTNERS L.P.	-3,758.
GS CAPITAL PARTNERS VI PARALLEL L.P.	20.
MEMORIAL PRODUCTION PARTNERS L.P.	324.
WILLIAMS PARTNERS L.P.	-3,836.
WINNER WATER SERVICES INC	-1,035,453.
 TOTAL TO FORM 990-T, PAGE 1, LINE 5	 -1,186,010.

FORM 990-T	OTHER INCOME	STATEMENT 2
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DESCRIPTION	AMOUNT
INSURANCE PREMIUMS FROM TAXABLE SUBSIDIARIES	115,426.
 TOTAL TO FORM 990-T, PAGE 1, LINE 12	 115,426.

FORM 990-T	OTHER DEDUCTIONS	STATEMENT 3
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DESCRIPTION	AMOUNT
CORPORATE AND DIVISIONAL OVERHEAD	1,867,925.
 TOTAL TO FORM 990-T, PAGE 1, LINE 28	 1,867,925.

FORM 990-T	NET OPERATING LOSS DEDUCTION	STATEMENT 4
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TAX YEAR	LOSS SUSTAINED	LOSS PREVIOUSLY APPLIED	LOSS REMAINING	AVAILABLE THIS YEAR
09/30/06	2,972,118.	2,655,379.	316,739.	316,739.
09/30/07	6,474,997.	0.	6,474,997.	6,474,997.
09/30/08	7,436,230.	0.	7,436,230.	7,436,230.
09/30/09	821,863.	0.	821,863.	821,863.
 NOL CARRYOVER AVAILABLE THIS YEAR			 15,049,829.	 15,049,829.

FORM 990-T	NAME OF FOREIGN COUNTRY IN WHICH ORGANIZATION HAS FINANCIAL INTEREST	STATEMENT	5
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NAME OF COUNTRY

GEORGIA
INDIA
JAPAN
MALAYSIA
SAUDI ARABIA
SINGAPORE
KOREA (SOUTH)
SWITZERLAND
CHINA
UKRAINE
UNITED KINGDOM

FORM 990-T	COST OF GOODS SOLD - OTHER COSTS	STATEMENT	6
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DESCRIPTIONAMOUNT

COST OF SALES FOR COMMERCIAL/UNRELATED SERVICES

45,139,894.

TOTAL TO FORM 990-T, SCHEDULE A, LINE 4B

45,139,894.

FORM 990-T SCHEDULE F - INTEREST, ANNUITIES, ROYALTIES STATEMENT 7
AND RENTS FROM CONTROLLED ORGANIZATIONS

1. NAME OF CONTROLLED ORGANIZATION	ACTIVITY NUMBER	2. EMPLOYER ID NO.
BLUEFIN ROBOTICS CORPORATION	2	20-2576696
EXEMPT CONTROLLED ORGANIZATIONS		

3. NET UNRELATED INCOME (LOSS)	4. TOTAL OF SPECIFIED PAYMENTS MADE	5. PART OF COL (4) INCLUDED IN GROSS INCOME	6. DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME
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NONEXEMPT CONTROLLED ORGANIZATIONS

7. TAXABLE INCOME	8. NET UNRELATED INCOME (LOSS)	9. TOTAL OF SPECIFIED PMTS	10. PART OF COL (9) INCLUDED IN GROSS INCOME	11. DEDUCTIONS DIRECTLY CONNECTED
-18,904,339.	2,442,363.	2,442,363.	2,442,363.	941,732.

1.	ACTIVITY	2.
NAME OF CONTROLLED ORGANIZATION	NUMBER	EMPLOYER ID NO.
GEOSAFE CORPORATION	3	91-1404268

EXEMPT CONTROLLED ORGANIZATIONS

3.	4.	5.	6.
NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PAYMENTS MADE	PART OF COL (4) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PMTS	PART OF COL (9) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED
-131,494.	115,494.	115,494.	115,494.	103,547.

1.	ACTIVITY	2.
NAME OF CONTROLLED ORGANIZATION	NUMBER	EMPLOYER ID NO.
JIP PTE LTD	4	47-0924456

EXEMPT CONTROLLED ORGANIZATIONS

3.	4.	5.	6.
NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PAYMENTS MADE	PART OF COL (4) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PMTS	PART OF COL (9) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED
-1,911,165.	203,688.	203,688.	203,688.	98,501.

1.		2.
NAME OF CONTROLLED ORGANIZATION		ACTIVITY NUMBER
BATTELLE-JAPAN CORPORATION		13
EXEMPT CONTROLLED ORGANIZATIONS		
3.	4.	5.
NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PAYMENTS MADE	PART OF COL (4) INCLUDED IN GROSS INCOME

6.
DEDUCTIONS DIRECTLY
CONNECTED WITH
COL (5) INCOME

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PMTS	PART OF COL (9) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED
-787,973.	111,722.	111,722.	111,722.	101,557.

1.		2.
NAME OF CONTROLLED ORGANIZATION		ACTIVITY NUMBER
BATTELLE ARABIA FOR SCIENCE & TECHNOLOGY		17
EXEMPT CONTROLLED ORGANIZATIONS		

3.	4.	5.	6.
NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PAYMENTS MADE	PART OF COL (4) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED INCOME (LOSS)	TOTAL OF SPECIFIED PMTS	PART OF COL (9) INCLUDED IN GROSS INCOME	DEDUCTIONS DIRECTLY CONNECTED
-158,472.	8,500.	8,500.	8,500.	7,727.

1.	2.
ACTIVITY	EMPLOYER
NUMBER	ID NO.
NAME OF CONTROLLED ORGANIZATION	
BATTELLE OKLAHOMA	18 20-0292062

EXEMPT CONTROLLED ORGANIZATIONS

3.	4.	5.	6.
NET UNRELATED	TOTAL OF SPECIFIED	PART OF COL (4)	DEDUCTIONS DIRECTLY
INCOME (LOSS)	PAYMENTS MADE	INCLUDED IN	CONNECTED WITH
GROSS INCOME	GROSS INCOME	COL (5) INCOME	

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED	TOTAL OF	PART OF COL (9)	DEDUCTIONS
	INCOME (LOSS)	SPECIFIED PMTS	INCLUDED IN	DIRECTLY
	GROSS INCOME	GROSS INCOME	COL (5) INCOME	CONNECTED
234,175.	1,284.	1,284.	1,284.	620.

1.	2.
ACTIVITY	EMPLOYER
NUMBER	ID NO.
NAME OF CONTROLLED ORGANIZATION	
LEX SYSTEMS INC	19 77-0526364

EXEMPT CONTROLLED ORGANIZATIONS

3.	4.	5.	6.
NET UNRELATED	TOTAL OF SPECIFIED	PART OF COL (4)	DEDUCTIONS DIRECTLY
INCOME (LOSS)	PAYMENTS MADE	INCLUDED IN	CONNECTED WITH
GROSS INCOME	GROSS INCOME	COL (5) INCOME	

NONEXEMPT CONTROLLED ORGANIZATIONS

7.	8.	9.	10.	11.
TAXABLE INCOME	NET UNRELATED	TOTAL OF	PART OF COL (9)	DEDUCTIONS
	INCOME (LOSS)	SPECIFIED PMTS	INCLUDED IN	DIRECTLY
	GROSS INCOME	GROSS INCOME	COL (5) INCOME	CONNECTED
-373,842.	16,930.	16,930.	16,930.	15,390.

1. NAME OF CONTROLLED ORGANIZATION	ACTIVITY NUMBER	2. EMPLOYER ID NO.
HEALTHCARE COLLOQUIUM INC	20	26-2347432

EXEMPT CONTROLLED ORGANIZATIONS

3. NET UNRELATED INCOME (LOSS)	4. TOTAL OF SPECIFIED PAYMENTS MADE	5. PART OF COL (4) INCLUDED IN GROSS INCOME	6. DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME
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NONEXEMPT CONTROLLED ORGANIZATIONS

7. TAXABLE INCOME	8. NET UNRELATED INCOME (LOSS)	9. TOTAL OF SPECIFIED PMTS	10. PART OF COL (9) INCLUDED IN GROSS INCOME	11. DEDUCTIONS DIRECTLY CONNECTED
-4,208,310.	805,519.	805,519.	805,519.	208,593.

1. NAME OF CONTROLLED ORGANIZATION	ACTIVITY NUMBER	2. EMPLOYER ID NO.
BATTELLE UK LIMITED	22	

EXEMPT CONTROLLED ORGANIZATIONS

3. NET UNRELATED INCOME (LOSS)	4. TOTAL OF SPECIFIED PAYMENTS MADE	5. PART OF COL (4) INCLUDED IN GROSS INCOME	6. DEDUCTIONS DIRECTLY CONNECTED WITH COL (5) INCOME
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NONEXEMPT CONTROLLED ORGANIZATIONS

7. TAXABLE INCOME	8. NET UNRELATED INCOME (LOSS)	9. TOTAL OF SPECIFIED PMTS	10. PART OF COL (9) INCLUDED IN GROSS INCOME	11. DEDUCTIONS DIRECTLY CONNECTED
1,867,945.	88,735.	88,735.	88,735.	88,735.

	ADD COLUMNS 5 AND 10	ADD COLUMNS 6 AND 11
TOTALS TO FORM 990-T, SCHEDULE F	3,794,235.	1,566,402.

FORM 990-T SCHEDULE F - DEDUCTIONS OF CONTROLLED ORGANIZATIONS STATEMENT 8
DIRECTLY CONNECTED WITH COLUMN 10 INCOME

DESCRIPTION		ACTIVITY NUMBER	AMOUNT	TOTAL
INTEREST EXPENSE			941,732.	
- SUBTOTAL -		2		941,732.
INTEREST EXPENSE			103,547.	
- SUBTOTAL -		3		103,547.
INTEREST EXPENSE			98,501.	
- SUBTOTAL -		4		98,501.
INTEREST EXPENSE			101,557.	
- SUBTOTAL -		13		101,557.
INTEREST EXPENSE			7,727.	
- SUBTOTAL -		17		7,727.
INTEREST EXPENSE			620.	
- SUBTOTAL -		18		620.
INTEREST EXPENSE			15,390.	
- SUBTOTAL -		19		15,390.
INTEREST EXPENSE			193,249.	
RENT EXPENSES			15,344.	
- SUBTOTAL -		20		208,593.
INTEREST EXPENSE			88,735.	
- SUBTOTAL -		22		88,735.
TOTAL OF FORM 990-T, SCHEDULE F, COLUMN 11				1,566,402.

FORM 4626 ALTERNATIVE MINIMUM TAX NOL DEDUCTION STATEMENT 9

TAX YEAR	LOSS SUSTAINED	LOSS PREVIOUSLY APPLIED	LOSS REMAINING
09/30/06	2,972,118.	2,493,216.	478,902.
09/30/07	6,474,997.	0.	6,474,997.
09/30/08	7,436,230.	0.	7,436,230.
09/30/09	821,863.	0.	821,863.
AMT NOL CARRYOVER AVAILABLE THIS YEAR			15,211,992.

Battelle Memorial Institute

EIN: 31-4379427

Tax Year 2014 (October 1, 2014 to September 30, 2015)

Form 990-T, Part I, Line 3 - Gross Profit

	UBI Research Project Revenue	Cost of Goods Sold/Direct Expenses	UBI Gross Profit
Battelle Columbus Division	20,451,760	(20,004,900)	446,860
Pacific Northwest Division	7,167,775	(6,877,079)	290,696
Battelle Geneva Division	0	0	0
UT-Battelle, LLC	8,325,181	(8,325,181)	0
Brookhaven Science Associates, LLC	1,020,767	(1,020,767)	0
Battelle Energy Alliance, LLC	8,911,967	(8,911,967)	0
Battelle Ventures, LP	0	0	0
Battelle Asia, LLC	0	0	0
Battelle Energy UK, LLC	0	0	0
Battelle National Biodefense Institute, LLC	0	0	0
Total - Battelle Memorial Institute	45,877,450	(45,139,894)	737,556

Form **8827**Department of the Treasury
Internal Revenue Service**Credit for Prior Year Minimum Tax - Corporations**

OMB No. 1545-0123

2014

▶ Attach to the corporation's tax return.

▶ Information about Form 8827 and its instructions is at www.irs.gov/form8827.

Name BATTELLE MEMORIAL INSTITUTE		Employer identification number 31-4379427
1 Alternative minimum tax (AMT) for 2013. Enter the amount from line 14 of the 2013 Form 4626	1	9,874.
2 Minimum tax credit carryforward from 2013. Enter the amount from line 9 of the 2013 Form 8827	2	9,108.
3 Enter any 2013 unallowed qualified electric vehicle credit (see instructions)	3	
4 Add lines 1, 2, and 3	4	18,982.
5 Enter the corporation's 2014 regular income tax liability minus allowable tax credits (see instructions)	5	0.
6 Is the corporation a "small corporation" exempt from the AMT for 2014 (see instructions)? • Yes. Enter 25% of the excess of line 5 over \$25,000. If line 5 is \$25,000 or less, enter -0- • No. Complete Form 4626 for 2014 and enter the tentative minimum tax from line 12	6	0.
7a Subtract line 6 from line 5. If zero or less, enter -0-	7a	0.
b For a corporation electing to accelerate the minimum tax credit, enter the bonus depreciation amount attributable to the minimum tax credit (see instructions)	7b	
c Add lines 7a and 7b	7c	
8a Enter the smaller of line 4 or line 7c. If the corporation had a post-1986 ownership change or has pre-acquisition excess credits, see instructions	8a	
b Current year minimum tax credit. Enter the smaller of line 4 or line 7a here and on Form 1120, Schedule J, Part I, line 5d (or the applicable line of your return). If the corporation had a post-1986 ownership change or has pre-acquisition excess credits, see instructions. If you made an entry on line 7b, go to line 8c. Otherwise, skip line 8c	8b	0.
c Subtract line 8b from line 8a. This is the refundable amount for a corporation electing to accelerate the minimum tax credit. Include this amount on Form 1120, Schedule J, Part II, line 19c (or the applicable line of your return)	8c	
9 Minimum tax credit carryforward to 2015. Subtract line 8a from line 4. Keep a record of this amount to carry forward and use in future years	9	18,982.