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OMB No 1545 1150

2008

Department of the Treasury Internal Revenue Service

Short Form

Return of Organization Exempt From Income Tax

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

Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form
990 All other org. anizations with gross receipts less than \$1,000,000 and total assets less than \$2,500,000 at the end of the
year may use this form year may use this form

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

Open to Public Inspection

Becker despectable fleater of the programme of the progra	Α	For t	ne 2008 calendar year, or tax year beginning 7/01 , 2008, and e	nding 6/30		, 2009
Section SOTION   Section Sotion Section Sotion   Section Sotion Section Sotion Section Sotion Section Sotion   Section Sotion Section Sotion Section Section Society   Section Section Section Section Section Section Section Section Section   Section	В			D E	mployer	identification number
Part		Addres	s change   Please   BERKELEY PUBLIC EDUCATION FOUNDATION		94-29	918219
BERKELEY, CA 94703   Servine remains   Servine   Servi	_	Name	change label or 1835 ALLSTON WAY	Εī	elephone	number
Remember of the properties   Section 501(CX3) organizations and 4947(eX1) nonexempt charitable trusts   Section 501(CX3) organizations and 4947(eX1) nonexempt charitable trusts   Muniber   Munib	_	Initial i	eturn type IBERKELEY. CA 94703		510-0	644-6244
**Section 501(ck2) organizations and 4947(a)(1) nonexempt charitable trusts		1	ation Specific			
Website: * www.bpef=online.org   The property   The property   Website: * www.bpef=online.org   The property		1	tions.			<u> </u>
Website: * www.bpef-online.org   Missing		•	Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ).	1		Cash X Accrual
Contraction type cleake other one					the o	rganization is <b>not</b>
Check	ı	Webs		required to attac	h Sch	edule B (Form 990,
S25,000 A Teturn is not required, but if the organization chooses to file a complete return	<u>J</u>			<del> </del>		
Lexic dil lines 5b, 6b, and 7b, 1o line 9 to determine gross receipts, if \$1,000,000 or more, file Form 990   \$ 671,757.     Part   Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)   1	K		if the organization is not a section 509(a)(3) supporting organization and its	gross receipts are no	rmally	not more than
Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)   1	_				JIII	<del></del>
1 Contributions, gifts, grants, and similar amounts received 2 Program service revenue including government fees and contracts 3 Membership dues and assessments 4 Investment income 5 Gross amount from sale of assets other than inventory b Less cost or other basis and sales expenses c Gain or (loss) from sale of assets other than inventory (Subtract in 5b from in 5a) (att sch) c Special events and activities (complete applicable parts of Schedule 6). If any amount is from gaming, check here a Gross revenue (not including \$ of contributions reported on line 1) b Less direct expenses other than fundraising expenses c Net income or (loss) from speale events and activities (Subtract line 6b from line 6a) 7 a Gross sales of inventory. [ess returns and allowances b Less cost of goods sold c Gross profit or (loss) from speale events and activities (Subtract line 7b from line 7a) 9 Total revenue (decembe ► See Statement 1	_	ınste	ad of Form 990-EZ			
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12   168,759.   13   Professional fees and other payments to independent contractors   13   14     15   15     16   64,398.   17   Total expenses (describe > See Statement 3   17   Total expenses (deficit) for the year (Subtract line 17 from here)   N, U   18   -23,348.   19   Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year figure reported on prior year's return)   20   Other changes in net assets or fund balances (attach explanation)   Net assets or fund balances at end of year Combine lines 18 through 20   Part II   Balance Sheets. If Total assets on line 25, column (B) are \$2,500,000 or more, file Form 990 instead of Form 990-EZ (See the instructions for Part II)   (A) Beginning of year (B) End of year 23   24   Other assets (describe > See Statement 4   13,507   24   1,458.   25   Total assets   516,555   25   507,577   26   7,135   26   27,135		1	The state of the s	Latement 2		401, 540.
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21   Net assets or fund balances at end of year   Combine lines 18 through 20   21   480, 442   4	, ' į	20				
(See the instructions for Part II )         22 Cash, savings, and investments       503,048. 22       506,119.         23 Land and buildings       23         24 Other assets (describe ► See Statement 4       )       13,507. 24       1,458.         25 Total assets       516,555. 25       507,577.         26 Total liabilities (describe ► See Statement 5       )       12,765. 26       27,135.	i	21_		·····	_	
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24 Other assets (describe ► See Statement 4 )       13,507. 24 1,458.         25 Total assets       516,555. 25 507,577.         26 Total liabilities (describe ► See Statement 5 )       12,765. 26 27,135.	<i>"</i>			503,048		506,119.
25 Total assets       516,555. 25       507,577.         26 Total liabilities (describe ► See Statement 5       )       12,765. 26       27,135.	•			12 50		1 450
<b>26 Total liabilities</b> (describe ► See Statement 5 ) 12,765. <b>26</b> 27,135.						

BAA For Privacy Act and Paperwork Reduction Act Notice, see the instructions for Form 990.

Form 990-EZ (2008)

Form	990-EZ (2008) BERKELEY PUBLIC	-291	8219 Page 2								
	Part III   Statement of Program Service Accomplishments (See the instructions.)   Expenses										
	What is the organization's primary exempt purpose? See Statement 6 (Required for 501(c)(3)										
Describe what was aphysical in corrupt out the coopyration's example purposes in a clear and copyra manner. and (4) organization											
desc	ribe the services provided, the number of	each	494/	(a)(1) trusts, optional thers)							
<u> </u>	ram title		101 0	uleis )							
28	See Statement 7		. – <i>– – – – – –</i> – –		1						
	(Grants \$ ) If th	is amount includes foreign gr	ants, check here	<b>•</b>	28 a	227,989.					
29	See Statement 8										
	260 260036003		·								
					1						
					29 a	144,244.					
	<del></del>	is amount includes foreign gr			23a	144,244.					
30	See Statement 9				-						
		is amount includes foreign gr	ants, check here	<u> </u>	30 a	229,610.					
31	Other program services (attach schedule		•		Ì						
	(Grants \$ ) If th	is amount includes foreign gr	ants, check here	<b>&gt;</b>	31 a						
32	Total program service expenses (add lii	nes 28a through 31a)		<u> </u>	32	601,843.					
Par	t IV List of Officers, Directors,	Trustees, and Key Em	ployees. (List each o	ne even if not coi	mpens	sated See the instrs.)					
		(b) Title and average hours		(d) Contributions	to	(e) Expense account					
	(a) Name and address	per week devoted	not paid, enter -0)	employee benefit pla	ns and	and other allowances					
		to position	<u>-</u>	deferred compensa							
KAF	REN_MCKIE	BOARD CHAIR	0.		0.	0.					
183	35 ALLSTON WAY	10.00									
BEE	RKELEY, CA 94703		i								
	ROL OLSON	VICE CHAIR PROG	0.		0.	0.					
	35 ALLSTON WAY	5.00	1		٠.						
		3.00									
	RKELEY, CA 94703										
	RSITA JARVIS	VICE CHAIR GOVT	0.		0.	0.					
183	35 ALLSTON WAY	5.00									
BEF	RKELEY, CA 94703										
MAF	RY FRIEDMAN	TREASURER.	0.		0.	0.					
	35 ALLSTON WAY	10.00									
	RKELEY, CA 94703										
	, , , , , , , , , , , , , , , , , , , ,	VICE CHAIR DEV.	0.	<del></del>	0.	0.					
	OITH_LUBMAN		• •		υ.						
	35 ALLSTON WAY	10.00									
BEF	RKELEY, CA 94703					<u> </u>					
MOI	LLY_FRAKER	EXEC DIRECTOR	84,996.		0.	0.					
183	35 ALLSTON WAY	40.00									
	RKELEY, CA 94703			ĺ							
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			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed description of each activity	33		х
34	Were any changes made to the organizing or governing documents but not reported to the IRS? If 'Yes,' attach a conformed copy of the changes	34		X
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but <b>not</b> reported on Form 990-T, attach a statement explaining your reason for not reporting the income on Form 990-T.			
	a Did the organization have unrelated business gross income of \$1,000 or more or 6033(e) notice, reporting, and	35 a		x
	proxy tax requirements?  b If 'Yes,' has it filed a tax return on Form 990-T for this year?	35 b		
36	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If 'Yes,' complete applicable parts of Schedule N	36		Х
	<b>a</b> Enter amount of political expenditures, direct or indirect, as described in the instructions <b>b</b> Did the organization file <b>Form 1120-POL</b> for this year?	37 b		х
	Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or were any such loans made in a prior year and still unpaid at the start of the period covered by this return?	38 a		х
	b If 'Yes,' complete Schedule L, Part II and enter the total amount involved  38b  N/A			
	501(c)(7) organizations Enter			
	a Initiation fees and capital contributions included on line 9. b Gross receipts, included on line 9, for public use of club facilities.  39b N/A			,
	b Gross receipts, included on line 9, for public use of club facilities  a 501(c)(3) organizations Enter amount of tax imposed on the organization during the year under			
70	section 4911 ► 0., section 4912 ► 0., section 4955 ► 0.			
	<b>b</b> 501(c)(3) and (4) organizations. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year?			
	If 'Yes,' complete Schedule L, Part I	40 b		X
	c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958			
	d Enter amount of tax on line 40c reimbursed by the organization			
	e All organizations. At any time during the tax year, was the organization a party to a prohibited tax			,
41	shelter transaction? If 'Yes,' complete Form 8886-T  List the states with which a copy of this return is filed None	40 e		<u> X</u>
41	List the states with which a copy of this feturn is fred > NOTIC			
	The MOLLY PRAYER	11 C	244	
42	a The books are in care of ► MOLLY_FRAKER Telephone no ► 510-64  Located at ► FILING ADDRESS ZIP + 4 ►	44-6	<u> </u>	
			V	No.
	<b>b</b> At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	42 b	Yes	No X
	If 'Yes,' enter the name of the foreign country			
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1, Report of a Foreign Bank and Financial Accounts.			
	c At any time during the calendar year, did the organization maintain an office outside of the U.S.?	42 c		<u> x</u>
	If 'Yes,' enter the name of the foreign country:			
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 — Check here		<b>-</b>	N/A
	and enter the amount of tax-exempt interest received or accrued during the tax year	•		N/A
			Yes	No
44	Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	44	ļ	Х
45	Is any related organization a controlled entity of the organization within the meaning of section 512(b)(13)? If 'Yes,' Form 990 must be completed instead of Form 990-EZ	45		Х

•	•									
Forn	990-EZ (2008) BERKELEY PUBLIC EDU				94-291			age <b>4</b>		
Pai	t VI Section 501(c)(3) organization	s only. All section	501(c)(3) org	anızatı						
	and complete the tables for lin	es 50 and 51.			See S	tateme				
46	Did the organization engage in direct or indire	ct political campaign ac	ctivities on beha	If of or i	n opposition to candida	tes 46	Yes	No X		
for public office? If 'Yes,' complete Schedule C, Part I										
47 Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II										
48	Is the organization operating a school as desc	• •			nete Schedule E	48		<u>X</u>		
	Did the organization make any transfers to an		related organiz	allon		49 a	<del>                                     </del>			
	of 'Yes,' was the related organization(s) a sec	J								
50	Complete this table for the five highest compered more than \$100,000 of compensation	ensated employees (oth n from the organization	er than officers, If there is none	director e, enter	rs, trustees and key em 'None '	ployees) w	ho ead	:h 		
	(a) Name and address of each employee paid more than \$100.000	(b) Title and average hours per week devoted to position	(c) Compensa	tion	(d) Contributions to employee benefit plans and deferred compensation	àcco	xpense unt and Howances	i		
Nor	ne						•			
		-								
Total	number of other employees paid over \$100,000									
51	Complete this table for the five highest competer from the organization. If there is none, enter the complete this table for the five highest competers the complete this table for the five highest competers.	ensated independent co 'None'	ntractors who e	ach rece	eived more than \$100,00	00 of comp	ensati	on		
	(a) Name and address of each independent cont	ractor paid more than \$100,000	)		(b) Type of service	(c) Com	pensatio	n		
Noi	ne									

of other employees paid over \$100,000			l
plete this table for the five highest compensated independent contractor the organization. If there is none, enter 'None'	ors who each receiv	ved more than \$100,0	000 of compensation
(a) Name and address of each independent contractor paid more than \$100,000	(b	) Type of service	(c) Compensation
	<u> </u>		1,7
		-	
has of other independent contractors recovered average \$100,000			
		ats and to the hest of my kr	nowledge and belief it is
true, correct and complete Declaration of preparer (other than officer) is based on all inform	nation of which preparer h	as any knowledge	towicage and belief, it is
1 a h MI MA		1- 6.12.	10
			70
1 ° . (1. • . • . • .		Date	
		<del></del>	
Type or print name and title	<del></del>		<del> </del>
Preparer's DS nA	Date	Check if	Preparer's Identifying Number See instructions)
signature DAVID M ROBERTS CPA	2/13/19	employed > X	M 6005021111
Firm's name (or David M. Roberts, CPA			
[émployed] ► 484 Lake Park Avenue, #18		EIN ▶	N/A
address, and ZIP + 4 Oakland, CA 94610		Phone no ► (51	.0) 382-1525
RS discuss this return with the preparer shown above? See instructions			►X Yes No
			Form <b>990-EZ</b> (2008)
	Deter this table for the five highest compensated independent contractor the organization. If there is none, enter 'None'  (a) Name and address of each independent contractor paid more than \$100.000  Under penalties of perjury, I declare that I have examined this return, including accompanyir true, correct and complete. Declaration of preparer (other than officer) is based on all inform Signature of officer  Preparer's signature  Preparer's signature  DAVID M ROBERTS CPA  Firm's name (or yours if self employed), address, and ZIP + 4  Oakland, CA 94610	Deter of other independent contractors receiving over \$100,000  Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statement true, correct, and complete Declaration of preparer (other than officer) is based on all information of which preparer is signature of officer  Preparer's signature  David M. Roberts, CPA  Firm's name (or yours if sell employed), address, and contractors and complete David M. Roberts, CPA  484 Lake Park Avenue, #18  Oakland, CA 94610	Deter this table for the five highest compensated independent contractors who each received more than \$100.00 the organization. If there is none, enter 'None'  (a) Name and address of each independent contractor paid more than \$100.000  (b) Type of service  Deter of other independent contractors receiving over \$100,000  Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my kindle true, correct and complete Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge  Signature of officer  Type or print name and title  Preparer's proposed by the part of the pa

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

Department of the Treasury Internal Revenue Service

Total

**Public Charity Status and Public Support** 

To be completed by all section 501 (c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.

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

2008

Open to Public Inspection

Employer identification number Name of the organization 94-2918219 BERKELEY PUBLIC EDUCATION FOUNDATION Reason for Public Charity Status (All organizations must complete this part.) (see instructions) The organization is not a private foundation because it is: (Please check only one organization.) A church, convention of churches or association of churches described in section 170(b)(1)(A)(i). 1 2 A school described in section 170(b)(1)(A)(ii). (Attach Schedule E) A hospital or cooperative hospital service organization described in section 170(b)(1)(A)(iii). (Attach Schedule H) 3 4 A medical research organization operated in conjunction with a hospital described in section 170(bX1XAXiii) Enter the hospital's An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 5 170(b)(1)(A)(iv). (Complete Part II) A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v). 6 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described 7 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) An organization that normally receives (1) more than 33-1/3 % of its support from contributions, membership fees, and gross receipts 9 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.) An organization organized and operated exclusively to test for public safety. See section 509(a)(4). (see instructions) 10 An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h | Type II Type III - Functionally integrated d | Type III— Other c l By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons? g Yes No a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) (i) 11 g (i) below, the governing body of the supported organization? a family member of a person described in (i) above? 11 g (ii) a 35% controlled entity of a person described in (i) or (ii) above? 11 g (iii) Provide the following information about the organizations the organization supports h (II) EIN (v) Did you notify the organization in (vi) Is the organization in col (i) Name of Supported (iii) Type of organization (iv) Is the (vii) Amount of Support Organization (described on lines 1-9 above or IRC section (see instructions)) organization in co (i) listed in your governing document? col (i) of (i) organized in the US? your support? No Yes No Yes No Yes

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

Schedule A (Form 990 or 990-EZ) 2008

18 BAA

Schedule A (Form 990 or 990-EZ) 2008

**b 10%-facts-and-circumstances test** – **2007.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and **stop here.** Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization

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.)

	(Complete only if you chec						
Sec	tion A. Public Support						
Calen	idar year (or fiscal yr beginning in)	(a) 2004	<b>(b)</b> 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1	Gifts, grants, contributions and membership fees received (Do not include 'unusual grants')	657,577.	625,400.	711,473.	704,767.	665,207.	3,364,424.
2	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt					,,,,,	0.
3	purpose Gross receipts from activities that are not an unrelated trade or business under section 513						0.
4	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0.
5	The value of services or facilities furnished by a governmental unit to the organization without charge						0.
6	Total. Add lines 1-5	657,577.	625,400.	711,473.	704,767.	665,207.	3,364,424.
_	Amounts included on lines 1, 2, 3 received from disqualified persons	0.	0.	0.	0.	0.	0.
b	Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000	0.	0.	0.	0.	0.	0.
_	Add lines 7a and 7b	0.	0.	0.	0.	0.	0.
	Public support (Subtract line						
0					<del></del>		3,364,424.
<u></u>	7c from line 6.)	<u></u>					3,304,424.
sec	tion B. Total Support						
		l I	4				
Cale	ndar year (or fiscal yr beginning in)	(a) 2004	<b>(b)</b> 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
Cale:	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form	657,577.	625,400.	711,473.	704,767.	665,207.	3,364,424.
Caler 9 10 a	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents,	4,875.	9,982.	711,473. 13,323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826.
Caler 9 10 a	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b	657,577.	625,400.	711,473.	704,767.	665,207.	3,364,424. 49,826.
Caler 9 10 a	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975	4,875.	9,982.	711,473. 13,323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826.
Caler 9 10 a b	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is	4,875.	9,982.	711,473. 13,323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826. 0. 49,826.
Caler 9 10 a b c 11 12 13	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12)	4,875. 4,875.	9,982.	711, 473. 13, 323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250.
Calei 9 10 a b c 11 12 13 14	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and	4,875.  4,875.  4,875.	9, 982. 9, 982.	711, 473. 13, 323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250.
Calei 9 10 a b c 11 12 13 14	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12)	4,875.  4,875.  4,875.	9, 982. 9, 982.	711, 473. 13, 323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250.
Calei 9 10 a b 11 12 13 14 Sec	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and	4,875.  4,875.  4,875.  s for the organization here  blic Support P	9, 982.  9, 982.  ation's first, secondercentage	711, 473.  13, 323.  13, 323.	704,767. 15,096.	665,207. 6,550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250.
Calei 9 10 a b c 11 12 13 14 Sec 15	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu	4,875.  4,875.  4,875.  s for the organization here  blic Support P  008 (line 8, column	9, 982.  9, 982.  9, 982.  ation's first, secondercentage of (f) divided by line	711, 473.  13, 323.  13, 323.  d, third, fourth, one 13, column (f))	704,767. 15,096.	665, 207. 6, 550. 6, 550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250. (3) ►
Calei 9 10 a b b c 11 12 13 14 Sec 15 16	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu Public support percentage from	4,875.  4,875.  4,875.  4,875.  Is for the organized stop here  blic Support P	9, 982.  9, 982.  9, 982.  etion's first, secondercentage of (f) divided by line Part IV-A, line 27	711, 473.  13, 323.  13, 323.  d, third, fourth, of third, fourth,	704,767. 15,096.	665, 207. 6, 550. 6, 550.	3,364,424. 49,826. 0. 49,826. 0. 3,414,250. (3) ► □
Calei 9 10 a b b 11 12 13 14 Sec 15 16 Sec	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu Public support percentage from tion D. Computation of Inv	4,875.  4,875.  4,875.  4,875.  4,875.  Stop here  blic Support P  2008 (line 8, column 2007 Schedule A,	9, 982.  9, 982.  9, 982.  ercentage  (f) divided by line Part IV-A, line 27 ne Percentage	711, 473.  13, 323.  13, 323.  d, third, fourth, of third, fourth,	704, 767.  15, 096.  15, 096.	665, 207. 6, 550. 6, 550. 5 a section 501(c) 15 16	3,364,424. 49,826. 0. 49,826. 0. 3,414,250. (3) ► □
Calei 9 10 a b b 11 12 13 14 Sec 15 16 Sec 17	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)  Total support. (add ins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu Public support percentage from those incomes in the support percentage from the support percentage f	4,875.  4,875.  4,875.  4,875.  Stop here  blic Support P  008 (line 8, column 2007 Schedule A, restment Incom for 2008 (line 10c,	9, 982.  9, 982.  9, 982.  ercentage of (f) divided by line Part IV-A, line 27 ne Percentage column (f) divided	711, 473.  13, 323.  13, 323.  d, third, fourth, of third, fourth,	704, 767.  15, 096.  15, 096.	665, 207. 6, 550. 6, 550. 6, 550. 15 16	3,364,424.  49,826.  0. 49,826.  0. 3,414,250.  (3)  98.5%  0.0%
Calei 9 10 a b b c c 11 12 13 14 Sec 15 16 Sec 17 18	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)  Total support. (add lins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu Public support percentage from the sale of capital assets (Explain in Part IV)  Public support percentage for 20 Public support percentage from the support tests — 2008. If the support tests — 2008. If the support tests — 2008. If the support tests — 2008.	4,875.  4,875.  4,875.  4,875.  4,875.  Stop here  blic Support P  008 (line 8, column 2007 Schedule A, restment Income for 2008 (line 10c, from 2007 Schedule organization did not organization did not set the set t	9, 982.  9, 982.  9, 982.  9, 982.  ercentage n (f) divided by line Part IV-A, line 27 ne Percentage column (f) divided le A, Part IV-A, lin check the box on line	711, 473.  13, 323.  13, 323.  d, third, fourth, of the 13, column (f)) g d by line 13, column (f) the 27h the 14, and line 15 in the 14,	704, 767.  15, 096.  15, 096.  r fifth tax year as  mn (f)) s more than 33-1/3	6, 550.  6, 550.  6, 550.  6, 550.  15 16  17 18 %, and line 17 is no	3,364,424.  49,826.  0. 49,826.  0. 3,414,250.  (3)  98.5% 0.0%
Calei 9 10 a b b 11 12 13 14 Sec 17 18 19 a	Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975. Add lines 10a and 10b Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).  Total support. (add ins 9, 10c, 11, and 12) First five years. If the Form 990 organization, check this box and tion C. Computation of Pu Public support percentage from those this support percentage from Investment income percentage finvestment income percentage finded in the page of the property of the page of the	4,875.  4,875.  4,875.  4,875.  4,875.  4,875.  6,875.  4,875.  1,875.  2007 Schedule A, restment Incomfor 2008 (line 10c, from 2007 Schedule A) or 2007 Schedule organization did not boox and stop here.	9, 982.  9, 982.  9, 982.  9, 982.  ercentage  n (f) divided by line Part IV-A, line 27 ne Percentage column (f) divided le A, Part IV-A, lin check the box on lin The organization	13, 323.  13, 323.  13, 323.  d, third, fourth, of the 13, column (f)) g d by line 13, column (f) g d by line 14, and line 15 in qualifies as a pullifies as	704, 767.  15, 096.  15, 096.  r fifth tax year as mn (f)) s more than 33-1/3 blicly supported of	665, 207.  6, 550.  6, 550.  6, 550.  15  16  17  18 %, and line 17 is no organization	3,364,424.  49,826.  0. 49,826.  0. 3,414,250.  (3)  98.5%  0.0%  1.5%  0.0%

Schedule	A (Form	1 990 or	990-E	Z) 2008	BER	KELEY	PUBL	IC	EDUC	ATION	FO	UNDATION	94-2918219	Page 4
Part IV	Sup	olemer	ntal In	forma	tion. C	omple	te this	par	t to p	rovide	the	explanatio	94-2918219 on required by Part II, information. (see insti	line 10;
	Part	II, line	17a	or 17b;	or Pa	<u>irt III, I</u>	ine 12	. Pr	ovide	any o	ther	<u>additional</u>	information, (see insti	ructions)
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2008	Federal Statements	Page 1
BERKE	LEY PUBLIC EDUCATION FOUNDATION	94-2918219
Statement 1 Form 990-EZ, Part I, Line 8 Other Revenue ADMIN FEES	Total \$	12,793. 12,793.
Statement 2 Form 990-EZ, Part I, Line 10 Grants and Similar Amounts Paid		
Donee's Name: Donee's Address: Cash Amount Given:	DIRECT CLASSROOM GRANTS VARIOUS BERKELEY, CA 94703 \$	165,036.
Donee's Name: Donee's Address: Cash Amount Given:	BERKELEY SCHOOL VOLUNTEERS PROJECT VARIOUS BERKELEY, CA 94703	116,265.
Donee's Name: Cash Amount Given:	RESTRICTED GRANTS \$	180,647.
Statement 3 Form 990-EZ, Part I, Line 16 Other Expenses		
CONTRACT SERVICES DEPRECIATION EVENT EXPENSES OPERATING EXPENSES PRINTING SUPPLIES	\$  Total \$	12,407. 1,075. 16,554. 13,994. 17,651. 2,717. 64,398.
Statement 4 Form 990-EZ, Part II, Line 24 Other Assets		
Machinery and Equipment Pledges and Grants Receivable Prepaid Expenses and Deferred	Beginning \$ 2,433. \$ 11,000. 74. Total \$ 13,507. \$	1,358. 75. 25. 1,458.

#### BERKELEY PUBLIC EDUCATION FOUNDATION

94-2918219

Statement 5 Form 990-EZ, Part II, Line 26 Total Liabilities

Accounts Payable and Accrued Expenses Grants Payable

	<u>F</u>	<u>Beginning</u>	_	Ending
	\$	12,765.	\$	26,122.
		0.		1,013.
Total	\$	12,765.	\$	27,135.
	=		_	

Statement 6 Form 990-EZ, Part III Organization's Primary Exempt Purpose

TO IMPROVE THE EDUCATION OF STUDENTS IN ALL BERKELEY'S PRE K-12TH GRADE PUBLIC SCHOOLS BY DIRECT GRANTS AND FACILITATING COMMUNITY PARTNERSHIPS.

Statement 7
Form 990-EZ, Part III, Line 28
Statement of Program Service Accomplishments

BOARD DIRECTED GRANTS ARE AWARDED FOR OVER 250 PROJECTS AND ACTIVITIES PROVIDING ACADEMIC SUPPORT, ENRICHMENT, INNOVATION OR PROFESSIONAL DEVELOPMENT FOR TEACHERS AND ADMINISTRATORS IN BERKELEY'S 19 PUBLIC SCHOOLS, SERVING OVER 9,000 STUDENTS FROM PRE K THROUGH 12TH GRADE. GRANTS SUPPORT A RANGE OF ACTIVITIES INCLUDING EQUIPMENT AND SUPPLY PURCHASES FOR ALL SUBJECTS AND DISCIPLINES, FIELD TRIPS TO CULTURAL, SCIENTIFIC, ENVIRONMENTAL AND NATURAL HISTORY VENUES; VISITING ARTISTS OR OTHER SPECIALISTS; BOOK AND CURRICULUM PURCHASES; GARDENING, COOKING AND NUTRITION PROGRAMS. SPECIAL GRANTS TO OUTSIDE ORGANIZATIONS WHO OPERATE IN BERKELEY'S SCHOOLS FUND SCIENCE PROFESSIONAL DEVELOPMENT FOR K-5 TEACHERS; A COLLABORATION WITH THE LOCAL SYMPHONY TO TEACH AND PERFORM WITH STUDENTS IN ALL ELEMENTARY SCHOOLS; A WRITING COACH PROGRAM IN THE MIDDLE AND HIGH SCHOOLS.

Statement 8
Form 990-EZ, Part III, Line 29
Statement of Program Service Accomplishments

BERKELEY SCHOOL VOLUNTEERS PROGRAM RECRUITS, TRAINS AND PLACES OVER 1,000 COMMUNITY MEMBERS EACH YEAR IN CLASSROOMS, LIBRARIES, GARDENS, PLAYGROUNDS AND AFTER SCHOOL PROGRAMS TO SUPPORT OUR TEACHERS, STAFF AND STUDENTS. THE PROGRAM WORKS CLOELY WITH COMMUNITY GROUPS, INDIVIDUAL CITIZENS AND ACTIVE STUDENT GROUPS ON THE UC CAMPUS, INCLUDING COORDINATING CLASS CREDIT FOR THE VOLUNTEERS TIME OF FUTURE TEACHING RESPONSIBILTIES AT INDIVIDUAL SCHOOL SITES. OTHER PROGRAMS INCLUDE A YEAR LONG LIT PAL RELATIONSHIP BETWEEN AN ADULT AND MIDDLE SCHOOL STUDENT WHO CORRESPOND WITH MONTHLY LETTERS, AND AN ANNUAL DROP EVERYTHING AND READ DEAR DAY WHEN COMMUNITY MEMBERS BRING FAVORITE BOOKS INTO ELEMENTARY SCHOOL CLASSROOMS TO READ TO STUDENTS.

## 2008

### **Federal Statements**

Page 3

BERKELEY PUBLIC EDUCATION FOUNDATION

94-2918219

Statement 9 Form 990-EZ, Part III, Line 30 **Statement of Program Service Accomplishments** 

MANAGEMENT, ADMINISTRATIVE AND ADVISORY SERVICES ARE GIVEN FOR SPECIAL FUNDS HELD BY BPEF TO BE USED FOR SPECIFIC PROGRAMS. FUNDS COME FROM A VARIETY OF PRIVATE AND PUBLIC SOURCES AND SUPPORT LARGE PROJECTS, SUCH AS BERKELEY HIGH SCHOOL HEALTH CENTER'S EDUCATION AND COUNSELING PROGRAMS; A PARTNERSHIP WITH BAYER HEALTHCARE TO SUPPORT K-8 SCIENCE EDUCATION; EARLY LITERACY COACHING FOR TEACHERS; AFTER SCHOOL ACADEMIC INTERVENTION PROGRAMS; SCHOOL BASED MENTAL HEALTH SERVICES; AND SUMMER READING PROGRAMS FOR AT RISK YOUTH.

Statement 10 Form 990-EZ, Part VI Regarding Transfers Associated with Personal Benefit Contracts

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

(b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

No

No

# Form **8868**

Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury Internal Revenue Service

File a separate application for each return.

OMB No 1545-1709

-	•	Extension, complete only Part I and check this box			<b>►</b> [X]
		omatic) 3-Month Extension, complete only Part II (o			
		dy been granted an automatic 3-month extension or		lied Form 6000	<del></del>
Part I	Automatic 3-Month Extens	ion of Time. Only submit original (no copie	es needed).		
A corporation	required to file Form 990-T and	requesting an automatic 6-month extension - check	k this box and o	complete Part I only	▶ □
•		), partnerships, REMICS, and trusts must use Form			_
income tax r	eturns	, partnerships, remisso, and trasts must use roim.	, 00 + 10 / 040001	arr exteriorer er tim	J 10 1110
the additiona Form 990-T	J (not automatic) 3-month extens	lectronically file Form 8868 if you want a 3-month au on required to file Form 990-T). However, you canno ion or (2) you file Forms 990-BL, 6069, or 8870, groi y completed and signed page 2 (Part II) of Form 886 e-file for Charities & Nonprofits	un refurns or a	i composite or consc	olidated
	Name of Exempt Organization		-	Employer identification r	number
Type or print				1	
•	BERKELEY PUBLIC EDUC			94-2918219	
File by the due date for	Number, street, and room or suite number	If a P O box, see instructions			
filing your return See	1835 ALLSTON WAY				
instructions	City, town or post office, state, and ZIP cod	de For a foreign address, see instructions			
	BERKELEY, CA 94703				
	of return to be filed (file a separa		□ <b>-</b> 430	20	
Form 990	-	Form 990-T (corporation)	Form 472		
Form 990	-	Form 990-T (section 401(a) or 408(a) trust)	Form 522		
X Form 990	<del> -</del>	Form 990-T (trust other than above)	Form 606		
Form 990	U-PF	Form 1041-A	Form 667	70	<del></del>
Telephone If the org If this is check the	for a Group Return, enter the org is box	FAX No. ► e or place of business in the United States, check the anization's four digit Group Exemption Number (GEI the group, check this box ► and attach a list with the group, check the state of th	N) If ith the names a		
		hs for a corporation required to file Form 990-T) ext			
	tension is for the organization's r	the exempt organization return for the organization eturn for	named above		
	calendar year 20 or				
► X	tax year beginning 7/01	, 20 <u>08</u> , and ending <u>6/30</u>	09		
2 If this t	ax year is for less than 12 month	s, check reason.  Initial return Final re	eturn C	Change in accounting	period
3a If this a	application is for Form 990-BL, 99 undable credits. See instructions.	90-PF, 990-T, 4720, or 6069, enter the tentative tax,	less any	3a \$	_0.
<b>b</b> If this a made	application is for Form 990-PF or Include any prior year overpayme	990-T, enter any refundable credits and estimated to ent allowed as a credit	ax payments	3b\$	0.
c Balanc deposit See ins	te <b>Due.</b> Subtract line 3b from line the with FTD coupon or, if required, structions	3a Include your payment with this form, or, if required by using EFTPS (Electronic Federal Tax Payment S	red, System)	3c \$	0.
Caution. If y payment inst		nic fund withdrawal with this Form 8868, see Form 84	453-EO and For	rm 8879-EO for	
BAA For Pri	ivacy Act and Paperwork Reduct	ion Act Notice, see instructions.		Form 8868 (F	Rev. 4-2009)

BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form <b>8868</b>	(Rev 4-2009)		Page 2
• If you a	are filing for an Additional (Not Automatic) 3-Month Extension, complete only	y Part II and check	this box
_	complete Part II if you have already been granted an automatic 3-month extension		sly filed Form 8868
	are filing for an Automatic 3-Month Extension, complete only Part I (on page		1.0
Part II	Additional (Not Automatic) 3-Month Extension of Time. Only	file the original	
	Name of Exempt Organization		Employer identification number
Type or print	BERKELEY PUBLIC EDUCATION FOUNDATION		94-2918219
File by the	Number, street, and room or suite number. If a P.O. box, see instructions		For IRS use only
extended due date for filing the return See	David M. Roberts, CPA 484 Lake Park Avenue, #18		
instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions		
	Oakland, CA 94610		
Form 9 Form 9 X Form 9 STOP! Do	90-BL Form 990-T (section 401(a) or 408(a) trust)	Form 1041-A Form 4720 Form 5227  xtension on a previ	Form 8870
If this is whole grou members to	rganization does not have an office or place of business in the United States, is for a Group Return, enter the organization's four digit Group Exemption Nurp, check this box  If it is for part of the group, check this box  He extension is for	mber (GEN)	If this is for the other than the names and EINs of all
<ul><li>5 For c</li><li>6 If this</li><li>7 State</li></ul>	Just an additional 3-month extension of time until5/15	08 , and endingFinal return	Change in accounting period
	application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentefundable credits. See instructions.	ative tax, less any	8a \$
paym	s application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable of tents made   Include any prior year overpayment allowed as a credit and any a Form 8868		
c Balar with f	nce Due. Subtract line 8b from line 8a Include your payment with this form, of FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment	or, if required, depo System) See instr	sit 8c \$
	Signature and Verification	n	
Under penaltie correct, and co	is of perjury, I declare that I have examined this form, including accompanying schedules and statement of that I am authorized to prepare this form  Title FXECUTVE		
	U		

FIFZ0502L 03/11/09

Form 8868 (Rev 4-2009)

BAA