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Form **990-EZ****Short Form**
Return of Organization Exempt From Income Tax

OMB No 1545-1150

2008Department of the Treasury
Internal Revenue Service

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

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

A For the 2008 calendar year, or tax year beginning 7/01, 2008, and ending 6/30, 2009

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Termination
☐ Amended return
☐ Application pending

C **BERKELEY HIGH SCHOOL DEVELOPMENT GROUP**
PO BOX 519
BERKELEY, CA 94701-0519

D Employer identification number 94-3173406

E Telephone number 510-464-1181

F Group Exemption Number

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

G Accounting method ☒ Cash ☐ Accrual
 Other (specify) ▶

H Check ☒ if the organization is **not** required to attach Schedule B (Form 990, 990-EZ, or 990-PF).

I Website: ▶ WWW.BHSDG.ORG

J Organization type (check only one) — ☒ 501(c) (3) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

K Check ☐ if the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally **not** more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts, if \$1,000,000 or more, file Form 990 instead of Form 990-EZ \$ 207,382.

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

1 Contributions, gifts, grants, and similar amounts received	1	<u>168,128.</u>
2 Program service revenue including government fees and contracts	2	
3 Membership dues and assessments	3	
4 Investment income	4	<u>3,675.</u>
5a Gross amount from sale of assets other than inventory	5a	
5b Less cost or other basis and sales expenses	5b	
5c Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (att sch)	5c	
6 Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here ☐		
6a Gross revenue (not including \$ <u>14,182.</u> of contributions reported on line 1)	6a	<u>35,579.</u>
6b Less direct expenses other than fundraising expenses	6b	<u>30,901.</u>
6c Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	6c	<u>4,678.</u>
7a Gross sales of inventory, less returns and allowances	7a	
7b Less cost of goods sold	7b	
7c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	7c	
8 Other revenue (describe ▶ <u> </u>)	8	
9 Total revenue (add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8)	9	<u>176,481.</u>
10 Grants and similar amounts paid (attach schedule) <u>SEE STATEMENT 1</u>	10	<u>141,120.</u>
11 Benefits paid to or for members	11	
12 Salaries, other compensation, and employee benefits	12	
13 Professional fees and other payments to independent contractors	13	<u>5,533.</u>
14 Occupancy, rent, utilities, and maintenance	14	
15 Printing, publications, postage, and shipping	15	<u>16,519.</u>
16 Other expenses (describe ▶ <u>SEE STATEMENT 2</u>)	16	<u>4,879.</u>
17 Total expenses (add lines 10 through 16)	17	<u>168,051.</u>
18 Excess or (deficit) for the year (Subtract line 17 from line 9)	18	<u>8,430.</u>
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)	19	<u>169,051.</u>
20 Other changes in net assets or fund balances (attach explanation) <u>SEE STATEMENT 3</u>	20	<u>2,941.</u>
21 Net assets or fund balances at end of year Combine lines 18 through 20	21	<u>180,422.</u>

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
22 Cash, savings, and investments	<u>389,243.</u>	<u>526,126.</u>
23 Land and buildings		
24 Other assets (describe ▶ <u>SEE STATEMENT 4</u>)	<u>26,753.</u>	<u>32,865.</u>
25 Total assets	<u>415,996.</u>	<u>558,991.</u>
26 Total liabilities (describe ▶ <u>SEE STATEMENT 5</u>)	<u>246,945.</u>	<u>378,569.</u>
27 Net assets or fund balances (line 27 of column (B) must agree with line 21)	<u>169,051.</u>	<u>180,422.</u>

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

Form 990-EZ (2008)

TEEA0803L 09/18/08

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24

Expenses

(Required for 501(c)(3) and (4) organizations and 4947(a)(1) trusts, optional for others.)

28 SEE STATEMENT 7

28 a

29 SEE STATEMENT 8

29 a

30

30 a

--	--

31 a

32

(a) Name and address

(c) Compensation (If not paid, enter -0-.)

(d) Contributions to employee benefit plans and deferred compensation

(e) Expense account and other allowances	
--	--

SEE STATEMENT 9

0.

0.

0.

Part V Other Information (Note the statement requirement in General Instruction V.)

	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		X
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		X
35 If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not 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 proxy tax requirements?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		
36 Was there a liquidation, dissolution, termination, or substantial contraction during the year? If 'Yes,' complete applicable parts of Schedule N		X
37 a Enter amount of political expenditures, direct or indirect, as described in the instructions. 37 a 0.		
b Did the organization file Form 1120-POL for this year?		X
38 a 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?		X
b If 'Yes,' complete Schedule L, Part II and enter the total amount involved 38 b N/A		
39 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on line 9 39 a N/A		
b Gross receipts, included on line 9, for public use of club facilities 39 b N/A		
40 a 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under section 4911 0. , section 4912 0. , section 4955 0.		
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		X
c Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 0.		
d Enter amount of tax on line 40c reimbursed by the organization 0.		
e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T		X
41 List the states with which a copy of this return is filed CA		

42 a The books are in care of **MARIA BAIRD** Telephone no **PO BOX 519 BERKELEY CA** ZIP + 4 **94701**

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)?
If 'Yes,' enter the name of the foreign country

	Yes	No
42 b		X
42 c		X

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.?
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 and enter the amount of tax-exempt interest received or accrued during the tax year **43** ☐ N/A 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		X
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		X

Part VI Section 501(c)(3) organizations only. All section 501(c)(3) organizations must answer questions 46-49 and complete the tables for lines 50 and 51. **SEE STATEMENT 10****46** 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

	Yes	No
46		☒
47		☒
48		☒
49a		☒
49b		

47 Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II**48** Is the organization operating a school as described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E**49a** Did the organization make any transfers to an exempt non-charitable related organization?**b** If 'Yes,' was the related organization(s) a section 527 organization?**50** Complete this table for the five highest compensated employees (other than officers, directors, trustees and key employees) who each received more than \$100,000 of compensation from the organization. If there is none, enter 'None'

(a) Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowances
NONE				
Total number of other employees paid over \$100,000				

51 Complete this table for the five highest compensated independent contractors who each received more than \$100,000 of compensation from 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	(c) Compensation
NONE		
Total number 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 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: *K. Louise Francis* Date: *15-17-10*

Type or print name and title: *K. Louise Francis, Chief Financial Officer*

Paid Preparer's Use Only

Preparer's signature: *SUSAN KOPMAN* Date: *5/17/10* Check if self-employed: ☐ Preparer's Identifying Number (See instructions): *N/A*

Firm's name (or yours if self-employed): *SKOPMAN, INC.* EIN: *N/A*

Address: *4223 SOLANO AVE. STE. 1* Phone no: *(510) 526-8255*

City and ZIP: *ALBANY, CA 94706*

May the IRS discuss this return with the preparer shown above? See instructions

☒ Yes ☐ No

BAA

Form 990-EZ (2008)

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)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions and membership fees received (Do not include 'unusual grants'.)	282,833.	118,532.	148,252.	209,860.	168,128.	927,605.
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf						0.
3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge						0.
4 Total. Add lines 1-3	282,833.	118,532.	148,252.	209,860.	168,128.	927,605.
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)						0.
6 Public support. Subtract line 5 from line 4						927,605.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	282,833.	118,532.	148,252.	209,860.	168,128.	927,605.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	4,245.	7,856.	9,679.	8,324.	3,675.	33,779.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) SEE PART IV				149.		149.
11 Total support. Add lines 7 through 10						961,533.
12 Gross receipts from related activities, etc. (see instructions)					12	0.
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 2008 (line 6, column (f) divided by line 11, column (f))	14	96.5 %
15 Public support percentage for 2007 Schedule A, Part IV-A, line 26f	15	0.0 %
16a 33-1/3 support test – 2008. If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization. ☒		
b 33-1/3 support test – 2007. 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 – 2008. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ☐		
b 10%-facts-and-circumstances test – 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. ☐		
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 ☐		

BAA

Schedule A (Form 990 or 990-EZ) 2008

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.)

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)						
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 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 1-5						
7a Amounts included on lines 1, 2, 3 received from disqualified persons						
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						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(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 on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (add lns 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 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2008 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2007 Schedule A, Part IV-A, line 27h	18	%

19a 33-1/3 support tests — 2008. 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 — 2007. If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐

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

Part IV

Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

[illegible]

Department of the Treasury
Internal Revenue Service

► Must be completed by organizations that answer 'Yes' to Form 990, Part IV, lines 17, 18, or 19, and by organizations that enter more than \$15,000 on Form 990-EZ, line 6a.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization

BERKELEY HIGH SCHOOL DEVELOPMENT GROUP

Employer identification number

94-3173406

Part I Fundraising Activities. Complete if the organization answered 'Yes' to Form 990, Part IV, line 17.
--

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

- | | | | |
|--------------------------|-------------------------|--------------------------|---------------------------------------|
| ☐ | Mail solicitations | ☐ | Solicitation of non-government grants |
| ☐ | Email solicitations | ☐ | Solicitation of government grants |
| ☐ | Phone solicitations | ☐ | Special fundraising events |
| ☐ | In-person solicitations | | |

2a Did the organization have written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☐ Yes ☐ No

b If 'Yes,' list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990EZ filers are not required to complete this table.

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

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

[illegible]

Part II Fundraising Events. Complete if the organization answered 'Yes' to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

REVENUE		(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events
		AUCTION (event type)	(event type)	(total number)	(Add col. (a) through col. (c))
	1 Gross receipts	49,761.			49,761.
	2 Less: Charitable contributions	14,182.			14,182.
	3 Gross revenue (line 1 minus line 2)	35,579.			35,579.
DIRECT EXPENSES	4 Cash prizes				
	5 Non-cash prizes				
	6 Rent/facility costs				
	7 Other direct expenses	30,901.			30,901.
	8 Direct expense summary. Add lines 4- through 7 in column (d)				30,901.
	9 Net income summary. Combine lines 3 and 8 in column (d)				4,678.

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

REVENUE		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming
					(Add col. (a) through col. (c))
	1 Gross revenue				
DIRECT EXPENSES	2 Cash prizes				
	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d)				
	8 Net gaming income summary. Combine lines 1 and 7 in column (d)				

9 Enter the state(s) in which the organization operates gaming activities _____**a** Is the organization licensed to operate gaming activities in each of these states?**b** If 'No,' Explain.**10 a** Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?**b** If 'Yes,' Explain**11** Does the organization operate gaming activities with nonmembers?**12** Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

	YES	NO
9 a		
10 a		
11		
12		

13 Indicate the percentage of gaming activity operated in**a** The organization's facility**13a** %**b** An outside facility**13b** %**14** Provide the name and address of the person who prepares the organization's gaming/special events books and records:

Name: ▶ _____

Address: ▶ _____

15a Does the organization have a contact with a third party from whom the organization receives gaming revenue?**15a****b** If 'Yes,' enter the amount of gaming revenue received by the organization \$ _____ and the amount of gaming revenue retained by the third party \$ _____**c** If 'Yes,' enter name and address:

Name ▶ _____

Address ▶ _____

16 Gaming manager information

Name: ▶ _____

Gaming manager compensation ▶ \$ _____

Description of services provided: ▶ _____

☐ Director/officer☐ Employee☐ Independent contractor**17** Mandatory distributions**a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?**17a****b** Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year: ▶ \$ _____

2008

FEDERAL STATEMENTS

PAGE 1

BERKELEY HIGH SCHOOL DEVELOPMENT GROUP

94-3173406

STATEMENT 1
FORM 990-EZ, PART I, LINE 10
GRANTS AND SIMILAR AMOUNTS PAID

DONEE'S NAME: SEE ATTACHED SUPPLEMENTAL INFORMATION
 CASH AMOUNT GIVEN: \$ 141,120.

STATEMENT 2
FORM 990-EZ, PART I, LINE 16
OTHER EXPENSES

BANK CHARGES	\$	492.
EQUIPMENT RENTAL + MAINTENANCE		183.
INSURANCE		1,585.
MISCELLANEOUS EXPENSES		292.
SUPPLIES		2,075.
TELECOMMUNICATIONS		252.
TOTAL	\$	<u>4,879.</u>

STATEMENT 3
FORM 990-EZ, PART I, LINE 20
OTHER CHANGES IN NET ASSETS OR FUND BALANCES

PRIOR PERIOD ADJUSTMENTS	\$	2,941.
TOTAL	\$	<u>2,941.</u>

STATEMENT 4
FORM 990-EZ, PART II, LINE 24
OTHER ASSETS

	<u>BEGINNING</u>	<u>ENDING</u>
PREPAID EXPENSES AND DEFERRED CHARGES	\$ 26,753.	\$ 32,865.
TOTAL	\$ <u>26,753.</u>	\$ <u>32,865.</u>

STATEMENT 5
FORM 990-EZ, PART II, LINE 26
TOTAL LIABILITIES

	<u>BEGINNING</u>	<u>ENDING</u>
FISCAL AGENT BALANCES	\$ 198,624.	\$ 348,164.
GRANTS PAYABLE	48,321.	30,405.
TOTAL	\$ <u>246,945.</u>	\$ <u>378,569.</u>

2008

SCHEDULE A, PART IV - SUPPLEMENTAL INFORMATION PAGE 5

BERKELEY HIGH SCHOOL DEVELOPMENT GROUP

94-3173406

PART II, LINE 10 - OTHER INCOME

NATURE AND SOURCE	2008	2007	2006	2005	2004
SALES OF ASSETS		149.			
TOTAL	\$ 0.	\$ 149.	\$ 0.	\$ 0.	\$ 0.

BERKELEY HIGH SCHOOL DEVELOPMENT GROUP

94-3173406

**STATEMENT 6
FORM 990-EZ, PART III
ORGANIZATION'S PRIMARY EXEMPT PURPOSE**

THE PRIMARY EXEMPT PURPOSE OF BERKELEY HIGH SCHOOL DEVELOPMENT GROUP (BHSDG) IS TO SUPPORT AND AUGMENT THE EDUCATIONAL PROGRAMS AND STUDENT SERVICES OF BERKELEY HIGH SCHOOL, INCLUDING BERKELEY TECHNOLOGY ACADEMY AND BERKELEY INDEPENDENT STUDY (COLLECTIVELY REFERRED TO AS "BHS"). THESE SCHOOLS HAVE A COMBINED ENROLLMENT OF APPROXIMATELY 3500 STUDENTS. THE BHSDG ACCOMPLISHES ITS EXEMPT PURPOSE THROUGH TWO PROGRAMS: MAKING AND ADMINISTERING GRANTS TO FUND PURCHASE AND PROGRAMS AT BHS AND SERVING AS A NON-PROFIT FISCAL AGENT FOR DEPARTMENTS AND PROGRAMS ASSOCIATED WITH BHS.

**STATEMENT 7
FORM 990-EZ, PART III, LINE 28
STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS**

THE BHSDG MADE AND ADMINISTERED GRANTS FROM UNRESTRICTED AND TEMPORARILY RESTRICTED FUNDS IN THE FOLLOWING AREAS:

(1) FURNITURE AND EQUIPMENT FOR BHS PROGRAMS: GRANTS INCLUDED THE PURCHASE OF SEVERAL PROJECTORS FOR CLASSROOM INSTRUCTION (ELMO/MULTIMEDIA PROJECTOR, DOCUMENT CAMERA AND PROJECTOR, LCD PROJECTOR, EIGHT EPSON POWERLIGHT PROJECTORS), 2 IMAC COMPUTERS WITH PRINTER, DOZENS OF GRAPHING CALCULATORS FOR THE MATH DEPARTMENT "LOAN" PROGRAM, A KILN FOR CERAMICS CLASSES, DIGITAL CAMERAS AND BATTERIES FOR PHOTOGRAPHY CLASSES, 12 CD PLAYERS FOR SPECIAL EDUCATION STUDENTS WITH READING CHALLENGES, ATHLETIC EQUIPMENT FOR FRESHMAN FOOTBALL.

(2) SOFTWARE, BOOKS AND SUPPLIES FOR BHS PROGRAMS: THROUGH OUR CLASSROOM NEEDS GRANTS, THE BHSDG GRANTED EACH TEACHER \$200 WITH WHICH TO PURCHASE SUPPLIES FOR HIS/HER CLASSROOM. THIS RESULTED IN THE PURCHASE OF A VARIETY OF THINGS, FROM BASIC OFFICE SUPPLIES TO SEVERAL SETS OF CLASSROOM BOOKS, CLASS FIELD TRIPS, AND A VARIETY OF ENRICHMENT MATERIALS AND SUPPLEMENTAL CURRICULA. ADDITIONAL GRANTS IN THIS AREA INCLUDE GRAPH PAPER FOR MATH CLASSES, THE DEVELOPMENT OF A STUDY GUIDE FOR AP ENVIRONMENTAL SCIENCE, CLASS BOOKS, BATTERY REPLACEMENT, AND HEALTHY SNACKS FOR THE COUNSELING OFFICES AND FOR THE VERA CASEY CENTER, OUR PREGNANT AND PARENTING TEENS PROGRAM.

(3) TOOLS FOR ACADEMIC SUCCESS: THE BHSDG GRANTED FUNDING FOR THE PUBLICATION AND DISTRIBUTION TO ALL BHS STUDENTS OF ACADEMIC ORGANIZERS THAT INCLUDE ESSENTIAL INFORMATION ABOUT THE SCHOOL. BHSDG ALSO GRANTED FUNDING FOR MULTIPLE STUDY SKILLS WORKSHOPS PROVIDED BY AN OUTSIDE VENDOR TO INTERESTED STUDENTS AND THEIR PARENTS.

(4) ENRICHMENT PROGRAMS: DURING THE SCHOOL YEAR, THE BHSDG GRANTED FUNDING FOR DANCE DEMONSTRATIONS IN HISTORY CLASSES TO TEACH ABOUT THE POPULAR CULTURE OF VARIOUS TIME PERIODS, FOR SPEAKERS TO ATTEND CREATIVE WRITING CLASSES TO TALK ABOUT WRITING MEMOIRS, FOR GUEST ARTISTS IN THE AFRO-HAITIAN DANCE CLASSES, FOR SPEAKERS FOR OUR LIFE ACADEMY PROGRAM, FOR AN AUTHOR TO SPEAK TO OUR STUDENTS ABOUT WRITING AND LITERATURE, FOR A STRENGTH AND CONDITIONING COACH, FOR THE CONTINUATION OF THE MOUSE SQUAD, A STUDENT-RUN SELF HELP DESK FOR TECHNOLOGY PROBLEMS, FOR NATIONAL TOURNAMENT FEES AND LODGING FOR QUIZ BOWL CLUB, FOR OUR STUDENT REPRESENTATIVE TO ATTEND THE BEST BUDDIES CLUB NATIONAL CONFERENCE, FOR OUR ELECTRICAL ENGINEERING CLUB TO PURCHASE MATERIALS WITH WHICH TO BUILD A ROBOT AND TO PARTICIPATE IN THE 2009 ROBOGAMES COMPETITION, FOR RACING GEAR FOR THE MOUNTAIN BIKING CLUB, FOR A PIANIST AND CHORAL DIRECTOR FOR THE CHORUS CLASS, FOR JAZZ FESTIVAL FEES AND TRANSPORTATION, FOR THE COOKING CLUB WHICH PAIRS DEVELOPMENTALLY CHALLENGED STUDENTS WITH TYPICAL STUDENTS FOR THE STRUCTURED ACTIVITY OF COOKING A MEAL, AND MANY MORE PROJECTS.

(5) ACADEMIC SUPPORT: BHSDG GRANTS FUNDED AFTER-SCHOOL TUTORING IN A VARIETY OF SUBJECT AREAS. IN ADDITION, BHSDG GRANTS HELPED FUND WRITING INITIATIVES SUCH AS THE COMMUNITY PARTNERSHIP ACADEMY'S WRITER COACH CONNECTION, AND MENTORING FOR ACADEMIC SUCCESS TUTORING FOR THE LIFE ACADEMY PROGRAM.

(6) SCHOOL ADMINISTRATION: BHSDG GRANTED DISCRETIONARY FUNDS TO THE DIFFERENT

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STATEMENT 7 (CONTINUED)
FORM 990-EZ, PART III, LINE 28
STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS

ADMINISTRATIVE AREAS OF BERKELEY HIGH SCHOOL. THE FUNDS WERE MAINLY SPENT ON OFFICE SUPPLIES.

(7) COLLEGE INFORMATION AND ASSISTANCE: BHSDG IS VERY ACTIVE IN PROMOTING A "COLLEGE BOUND" CULTURE AT BERKELEY HIGH SCHOOL. THIS BEGINS WITH PROVIDING GRANTS FOR PUBLICATION AND DISTRIBUTION OF A VOLUNTEER-PRODUCED GUIDE TO THE COLLEGE PLANNING AND APPLICATION PROCESS, INCLUDING A TRANSLATION IN SPANISH. BHSDG GRANTED FUNDING TO TAKE EACH SOPHOMORE AND SEVERAL JUNIORS ON A FIELD TRIP TO VISIT TWO COLLEGES, PARTICIPATING IN A TOUR OF THE CAMPUS AND EATING LUNCH IN THE CAFETERIA. BHSDG GRANTS MONEY TO THE 1ST STEP PROGRAM FUND THAT ASSISTS LOW INCOME STUDENTS FROM FAMILIES WITHOUT A HISTORY OF ATTENDING COLLEGE BY GRANTING THEM MONEY TO PAY FOR COLLEGE RELATED FEES; BHSDG ALSO FUNDS THE COLLEGE AND CAREER CENTER SO THAT THEY CAN ASSIST LOW INCOME STUDENTS IN PAYING FOR COLLEGE APPLICATION FEES, TESTI

STATEMENT 8
FORM 990-EZ, PART III, LINE 29
STATEMENT OF PROGRAM SERVICE ACCOMPLISHMENTS

THE BHSDG SERVED AS NON-PROFIT FISCAL AGENT FOR MANY OF THE VARIOUS DEPARTMENTS, SMALL SCHOOLS AND OTHER PROGRAMS OF BHS. DURING 2008-2009, THE BHSDG RECEIVED OVER \$400,000 OF DONATIONS AND OTHER REVENUES ON BEHALF OF BHS DEPARTMENTS AND PROGRAMS. DURING THIS SAME PERIOD, THE BHSDG EXPENDED \$280,000 OF FISCAL BALANCE FUNDS UNDER THE DIRECTION OF REPRESENTATIVES OF THESE PROGRAMS. BHS DEPARTMENTS AND PROGRAMS SPENT THESE FUNDS ON A WIDE RANGE OF EXPENSES INCLUDING EQUIPMENT, BOOKS AND SUPPLIES FOR CLASSROOMS AND LABS, ENRICHMENT ACTIVITIES, SCHOLARSHIPS, AND STIPENDS FOR TUTORS, GUEST PERFORMING ARTISTS, GUEST VISUAL ARTISTS, GUEST INSTRUCTORS, AND OTHER OUTSIDE SPEAKERS.

STATEMENT 9
FORM 990-EZ, PART IV
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED</u>	<u>COMPEN- SATION</u>	<u>CONTRI- BUTION TO EBP & DC</u>	<u>EXPENSE ACCOUNT/ OTHER</u>
SUSAN HELMRICH PO BOX 519 BERKELEY, CA 94701	PRESIDENT 7.00	\$ 0.	\$ 0.	0.
JENNIFER BURROUGHS PO BOX 519 BERKELEY, CA 94701	PRESIDENT 7.00	0.	0.	0.
SHAWNA HARTMAN BROTSKY PO BOX 519 BERKELEY, CA 94701	VICE PRESIDENT 7.00	0.	0.	0.

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STATEMENT 9 (CONTINUED)
 FORM 990-EZ, PART IV
 LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
CHRISTINA TARR PO BOX 519 BERKELEY, CA 94701	SECRETARY \$ 2.00	\$ 0.	\$ 0.	\$ 0.
MARIA BAIRD PO BOX 519 BERKELEY, CA 94701	TREASURER 6.00	0.	0.	0.
MARIAN BERGES PO BOX 519 BERKELEY, CA 94701	TREASURER 2.00	0.	0.	0.
RHONDA GROSSMAN PO BOX 519 BERKELEY, CA 94701	TREASURER 6.00	0.	0.	0.
MELISSA BLOOM PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
KIM BOSTON PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
NOMALANGA BURKLEY PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
CHRIS BYRNE PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
DONNA COLLINS PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
JULIE HOLCOMB PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
ELLIE KATZ PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
MICHAEL KATZ PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.

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STATEMENT 9 (CONTINUED)

FORM 990-EZ, PART IV

LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
MELISSA MILTON PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	\$ 0.	\$ 0.	\$ 0.
MARY KAY MURLAS PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
BILL NEWTON PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
MALCOLM PLANT PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
CHARLIE POLLACK PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
LINDA SAFARIK-TONG PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
AMI SCHNEIDER PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
CAROLE UNGVARSKY PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
JANE WISE PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
WILMA WYSS PO BOX 519 BERKELEY, CA 94701	DIRECTOR 1.00	0.	0.	0.
	TOTAL	\$ 0.	\$ 0.	\$ 0.

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STATEMENT 10
FORM 990-EZ, PART VI
REGARDING TRANSFERS ASSOCIATED WITH PERSONAL BENEFIT CONTRACTS

(A) DID THE ORGANIZATION, DURING THE YEAR, RECEIVE ANY FUNDS, DIRECTLY OR
INDIRECTLY, TO PAY PREMIUMS ON A PERSONAL BENEFIT CONTRACT?

NO

(B) DID THE ORGANIZATION, DURING THE YEAR, PAY PREMIUMS, DIRECTLY OR
INDIRECTLY, ON A PERSONAL BENEFIT CONTRACT?

NO

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STATEMENT 1
FORM 990-EZ
LINE 10
GRANTS AND SIMILAR AMOUNTS PAID:

7/1/2008	COUNSELING DEPARTMENT GRANT	\$ 489
7/1/2008	KATHERINE HERRICK MEMORIAL GRANT	1,000
7/1/2008	COLLEGE & CAREER CTR GRANT	500
7/1/2008	GILBERT & SULLIVAN GRANT	500
7/1/2008	HEALTH CENTERGRANT	138
7/1/2008	PARENT RESOURCE CENTER GRANT	170
7/1/2008	BERKELEY ATHLETIC FUND GRANT	4,882
7/1/2008	SPECIAL EDUCATION DEPT GRANT	480
9/30/2008	AFTER SCHOOL TUTORING GRANT	24,500
9/30/2008	COLLEGE HANDBOOK GRANT	95
10/5/2008	EMERGENCY GRAPH PAPER GRANT	154
10/5/2008	NON-FICTION LITERATURE GRANT	740
10/7/2008	BIHS PURCHASE OF 8 PROJECTORS	2,580
10/7/2008	VERA CASEY TEEN PARENTING CTR	3,374
10/7/2008	CPA PARENTS ASSOC CHILDCARE AND TRANSLATION	153
10/7/2008	STUDY SKILLS WORKSHOP GRANT	2,200
10/18/2008	MEMOIRE SPEAKER GRANT	200
11/5/2008	CERAMIC ARTS STUDIO KILN	3,069
11/6/2008	AFTERSCHOOL TUTORING-IEP STUDENTS	1,620
11/6/2008	2 IMAC COMPUTERS FOR BHS STUDIO	4,448
11/6/2008	AP TEST CURRICULUM DEVELOPMENT	1,075
11/6/2008	BHS CHORAL CLUB	2,096
11/6/2008	GRAPHING CALCULATOR GRANT	1,605
11/10/2008	HARLEM RENAISSANCE DANCE GRANT	300
11/10/2008	FRESHMAN FOOTBALL EQUIPMENT	3,153
11/11/2008	FUND 9TH - 11TH GRADE COLLEGE VISITS	670
11/11/2008	PURCHASE DIGITAL CAMERAS	1,890
11/11/2008	AFTERSCHOOL TUTORING GRANT	2,950
12/2/2008	AFRO-HAITIAN RESIDENT ARTIST	825
12/3/2008	FUND LOW INCOME STUDENTS' COLLEGE APP AND TEST SCORE FEES	1,958
12/4/2008	AUTHOR GUEST SPEAKER S. DRAPER	800
12/4/2008	COOKING ACTIVITY CLUB FOR SPECIAL ED	982
12/8/2008	LIBRARY DISCRETIONARY FUND	500
12/8/2008	STAFF DEVELOPMENT FOR MATH DEPT	1,600
12/9/2008	FINANCIAL SUPPORT FOR IB EXAM FEES	2,850
12/10/2008	CLASSROOM GRANTS - \$200.00 PER TEACHER	24,448
12/18/2008	BEST BUDDIES GRANT	221
12/31/2008	SPEAKER IN SHORT STORY CLASS	50
1/6/2009	SLC DISCRETIONARY FUND	500
1/6/2009	AUTONOMOUS ROBOT GRANT	800
1/10/2009	IND. STUDY TUTORING GRANT	1,025
2/6/2009	LIFE ACADEMY MAS TUTORING GRANT	1,818
2/6/2009	LIFE ACADEMY GUEST ARTIST GRANT	1,000
2/10/2009	KILN REPAIR	254
2/10/2009	CAS TEACHER TRAINING	341
2/18/2009	DIGITAL PRINTER-CULTURAL AESTHETICS	200
3/8/2009	MOUNTAIN BIKE CLUB GRANT	1,115
3/19/2009	FRONT OFFICE DISCRETIONARY FUND	350
3/19/2009	REGISTRAR OFFICE DISCRETIONARY FUND	350
3/29/2009	GUEST ARTIST STIPEND	50
3/31/2009	DISCRETIONARY GRANT-COUNSELING OFFICE	350
4/17/2009	READING AND WRITING SHORT STORY GRANT	100
4/17/2009	QUIZ BOWL NAT'L TOURNAMENT GRANT	1,129
4/17/2009	COLLEGE APPLICATION HANDBOOK GRANT	7,250

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4/22/2009	AP TEST FEES GRANT	2,500
4/22/2009	1ST STEP SCHOLARSHIP	10,000
4/22/2009	STAR TESTING INCENTIVES GRANT	300
4/30/2009	BEST BUDDIES EXEC COMM GRANT	250
6/5/2009	SUMMER MAILING/MEMBERSHIP	3,145
6/5/2009	STUDENT ORGANIZER GRANT	4,500
6/5/2009	DOCUMENT CAMERA/PROJECTOR	1,210
6/5/2009	WRITER COACH SITE COORDINATOR	3,000
6/5/2009	CAMERA BATTERIES FOR PHOTO CLASSES	270
6/5/2009	SPANISH TRANSLATION OF OUTREACH MATLS	50
TOTAL GRANTS		\$141,120