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Form **990-EZ**

# 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)

OMB No 1545-1150

**2008****Open to Public Inspection**Department of the Treasury  
Internal Revenue Service

► Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations 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.

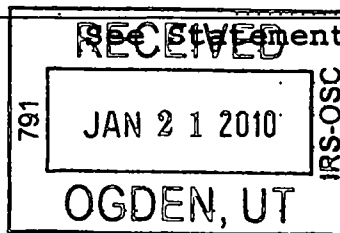
**A For the 2008 calendar year, or tax year beginning 9/01/08, and ending 8/31/09**

<b>B</b> Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>Please use IRS label or print or type. See Specific Instructions.</b>	<b>C Name of organization</b> <b>Foundation for Excellence</b>		<b>D Employer identification number</b> <b>75-2200565</b>
		Number and street (or P O box, if mail is not delivered to street address) Room/suite <b>1628 19th Street</b>		<b>E Telephone number</b> <b>806-799-5255</b>
		City or town, state or country, and ZIP + 4 <b>Lubbock TX 79401</b>		<b>F Group Exemption Number</b> <input type="checkbox"/>

• **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 ☐ AccrualOther (specify) ☐**I Website:** **N/A****J Organization type** (check only one) ☒ 501(c) ( **3** ) (insert no ) ☐ 4947(a)(1) or ☐ 527**H Check** ☐ if the organization is not required to attach Schedule B (Form 990, 990-EZ, or 990-PF)**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** **\$ 154,967****Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.)**

<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, and similar amounts received	<b>1</b>	<b>53,285</b>
	<b>2</b> Program service revenue including government fees and contracts	<b>2</b>	
	<b>3</b> Membership dues and assessments	<b>3</b>	
	<b>4</b> Investment income	<b>4</b>	<b>13,028</b>
	<b>5a</b> Gross amount from sale of assets other than inventory	<b>5a</b>	
	<b>b</b> Less: cost or other basis and sales expenses	<b>5b</b>	
	<b>c</b> Gain or (loss) from sale of assets other than inventory (Subtract line 5b from line 5a) (attach sch )	<b>5c</b>	
	<b>6</b> Special events and activities (complete applicable parts of Schedule G) If any amount is from gaming, check here <input type="checkbox"/>		
	<b>a</b> Gross revenue (not including \$ <b>25,000</b> of contributions reported on line 1)	<b>6a</b>	<b>88,654</b>
	<b>b</b> Less: direct expenses other than fundraising expenses	<b>6b</b>	
<b>c</b> Net income or (loss) from special events and activities (Subtract line 6b from line 6a)	<b>6c</b>	<b>88,654</b>	
<b>7a</b> Gross sales of inventory, less returns and allowances	<b>7a</b>		
<b>b</b> Less: cost of goods sold	<b>7b</b>		
<b>c</b> Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a)	<b>7c</b>		
<b>8</b> Other revenue (describe <input type="checkbox"/> )	<b>8</b>		
<b>9 Total revenue.</b> Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8	<b>9</b>	<b>154,967</b>	
<b>Expenses</b>	<b>10</b> Grants and similar amounts paid (attach schedule)	<b>10</b>	<b>124,952</b>
	<b>11</b> Benefits paid to or for members	<b>11</b>	
	<b>12</b> Salaries, other compensation, and employee benefits	<b>12</b>	
	<b>13</b> Professional fees and other payments to independent contractors	<b>13</b>	<b>5,135</b>
	<b>14</b> Occupancy, rent, utilities, and maintenance	<b>14</b>	<b>135</b>
	<b>15</b> Printing, publications, postage, and shipping	<b>15</b>	<b>160</b>
	<b>16</b> Other expenses (describe <input type="checkbox"/> <b>See Statement 2</b> )	<b>16</b>	<b>21,443</b>
	<b>17 Total expenses.</b> Add lines 10 through 16	<b>17</b>	<b>151,825</b>
	<b>18</b> Excess or (deficit) for the year (Subtract line 17 from line 9)	<b>18</b>	<b>3,142</b>
	<b>19</b> 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)	<b>19</b>	<b>480,976</b>
	<b>20</b> Other changes in net assets or fund balances (attach explanation) <b>See Statement 3</b>	<b>20</b>	<b>732</b>
	<b>21</b> Net assets or fund balances at end of year Combine lines 18 through 20	<b>21</b>	<b>484,850</b>

**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
<b>22</b> Cash, savings, and investments	<b>480,354</b>	<b>484,363</b>
<b>23</b> Land and buildings	<b>622</b>	<b>487</b>
<b>24</b> Other assets (describe <input type="checkbox"/> )		
<b>25 Total assets</b>	<b>480,976</b>	<b>484,850</b>
<b>26 Total liabilities</b> (describe <input type="checkbox"/> )	<b>0</b>	<b>0</b>
<b>27 Net assets or fund balances</b> (line 27 of column (B) must agree with line 21)	<b>480,976</b>	<b>484,850</b>

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

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9-9-10

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

## Expenses

What is the organization's primary exempt purpose?

See Statement 4

Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each program title.

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

28 GRANTS/EDUCATIONAL COSTS FOR STUDENTS OF LUBBOCK ISD TO  
PARTICIPATE IN ACTIVITIES ABOVE AND BEYOND THE SCOPE OF  
THE DISTRICT'S FINANCIAL POLICIES

(Grants\$ **124,952**) If this amount includes foreign grants, check here

▶

**28a**

124,952

29

(Grants \$ ) If this amount includes foreign grants, check here

▶

**29a**

30

(Grants\$ ) If this amount includes foreign grants, check here

▶

**30a**

**31 Other program services (attach schedule)**

(Grants \$ ) If this amount includes foreign grants, check here

▶ ☐

31a

**32 Total program service expenses** (add lines 28a through 31a)

32

**124,952**

**Part IV** List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated (See the instructions for Part IV )

[illegible]

**Part V Other Information** (Note the statement requirements in the instructions for Part VI.)

	Yes	No
<b>33</b> Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		<b>X</b>
<b>34</b> 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		<b>X</b>
<b>35</b> 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		
<b>a</b> Did the organization have unrelated business gross income of \$1,000 or more or section 6033(e) notice, reporting, and proxy tax requirements?		<b>X</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>36</b> Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," complete applicable parts of Schedule N		<b>X</b>
<b>37a</b> Enter amount of political expenditures, direct or indirect, as described in the instr <span style="float:right">▶ <b>37a</b></span>		
<b>b</b> Did the organization file <b>Form 1120-POL</b> for this year?		<b>X</b>
<b>38a</b> 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?		<b>X</b>
<b>b</b> If "Yes," complete Schedule L, Part II and enter the total amount involved <span style="float:right"><b>38b</b></span>		
<b>39</b> Section 501(c)(7) organizations. Enter:		
<b>a</b> Initiation fees and capital contributions included on line 9 <span style="float:right"><b>39a</b></span>		
<b>b</b> Gross receipts, included on line 9, for public use of club facilities <span style="float:right"><b>39b</b></span>		
<b>40a</b> Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under: section 4911 ▶ _____, section 4912 ▶ _____; section 4955 ▶ _____		
<b>b</b> Section 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		<b>X</b>
<b>c</b> Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 <span style="float:right">▶ _____</span>		
<b>d</b> Enter amount of tax on line 40c reimbursed by the organization <span style="float:right">▶ _____</span>		
<b>e</b> 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		<b>X</b>
<b>41</b> List the states with which a copy of this return is filed▶ <b>None</b>		
<b>42a</b> The books are in care of ▶ <b>LINSEY MCCUTCHIN</b> Telephone no ▶ <b>806-766-1067</b> <b>LUBBOCK ISD</b> Located at ▶ <b>LUBBOCK, TX</b> ZIP + 4 ▶ <b>79401</b>		
<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)? If "Yes," enter the name of the foreign country ▶ _____ See the instructions for exceptions and filing requirements for <b>Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.</b>		
<b>c</b> 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 ▶ _____		
<b>43</b> Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of <b>Form 1041</b> —Check here and enter the amount of tax-exempt interest received or accrued during the tax year <span style="float:right">▶ <b>43</b></span>		
<b>44</b> Did the organization maintain any donor advised funds? If "Yes," Form 990 must be completed instead of Form 990-EZ		<b>X</b>
<b>45</b> 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		<b>X</b>

Form 990-EZ (2008)

**Foundation for Excellence****75-2200565**Page **4****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.

- 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
- 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"

	Yes	No
<b>46</b>		<b>X</b>
<b>47</b>		<b>X</b>
<b>48</b>		<b>X</b>
<b>49a</b>		<b>X</b>
<b>49b</b>		

(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 & 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 each 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: Bob Tate Date: 1-11-2010

Type or print name and title: BOB TATE, PRESIDENT

**Paid Preparer's Use Only**

Preparer's signature: Cy D C Seidenman CPA Date: 1/06/10 Check if self-employed: ☐

Firm's name (or yours if self-employed), address, and ZIP + 4: ROBISON, JOHNSTON & PATTON, LLP  
3823 84TH STREET  
LUBBOCK, TX 79423

Preparer's Identifying Number (See instr): P00481482

EIN: 75-2059108

Phone no: 806-783-0268

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

Yes ☐ No ☐Form **990-EZ** (2008)

**SCHEDULE A**  
(Form 990 or 990-EZ)Department of the Treasury  
Internal Revenue Service**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.

OMB No 1545-0047

**2008**Open to Public  
Inspection

Name of the organization

**Foundation for Excellence**

Employer identification number

**75-2200565****Part I Reason for Public Charity Status** (All organizations must complete this part.) (see instructions)The organization is not a private foundation because it is. (Please check only **one** organization.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E.)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).** (Attach Schedule H.)
- 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).** (see instructions)
- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☐ Type I    b ☐ Type II    c ☒ Type III—Functionally Integrated    d ☐ Type III—Other
- e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box ☐
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?
- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11g(i)		<input checked="" type="checkbox"/>
11g(ii)		<input checked="" type="checkbox"/>
11g(iii)		<input checked="" type="checkbox"/>

h Provide the following information about the organizations the organization supports.

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
<b>LUBBOCK INDEPENDENT SCHOOL DISTRICT</b>		<b>2</b>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<b>124,952</b>
<b>Total</b>									<b>124,952</b>

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

Schedule A (Form 990 or 990-EZ) 2001

**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 any "unusual grants.")						
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 <b>Total.</b> Add lines 1-3						
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 <b>Public support.</b> Subtract line 5 from line 4						

**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						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 <b>Total support.</b> Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	

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

**Section C. Computation of Public Support Percentage**

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	%
16a <b>33 1/3 % support test—2008.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3 % or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
b <b>33 1/3 % support test—2007.</b> 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 <b>stop here.</b> The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
17a <b>10%-facts-and-circumstances test—2008.</b> 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 <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
b <b>10%-facts-and-circumstances test—2007.</b> 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 <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ► <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► <input type="checkbox"/>		

**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 year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
<b>2</b> 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						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1-5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</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						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						
<b>14 First five years.</b> 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 <b>stop here</b> <input type="checkbox"/>						

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	%
<b>16</b> Public support percentage from 2007 Schedule A, Part IV-A, line 27g	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

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

- 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 line 19a, and line 16 is more than 33 1/3 %, and line 18 is not more than 33 1/3 %, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

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



Schedule A (Form 990 or 990-EZ) 2008 **Foundation for Excellence**

**75-2200565**

Page **4**

**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)

Form **4562**  
Department of the Treasury  
Internal Revenue Service (99)

**Depreciation and Amortization**  
(Including Information on Listed Property)

OMB No 1545-0172

**2008**Attachment  
Sequence No **67**

▶ See separate instructions. ▶ Attach to your tax return.

Name(s) shown on return

**Foundation for Excellence**

Identifying number

**75-2200565**

Business or activity to which this form relates

**Indirect Depreciation****Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount. See the instructions for a higher limit for certain businesses	1	<b>250,000</b>
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	<b>800,000</b>
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	

(a) Description of property	(b) Cost (business use only)	(c) Elected cost	
6			
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2007 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2009. Add lines 9 and 10, less line 12	13	

**Note:** Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instructions)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

**Part III MACRS Depreciation (Do not include listed property.) (See instructions.)****Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2008	17	<b>135</b>
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

**Section B—Assets Placed in Service During 2008 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27.5 yrs	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

**Section C—Assets Placed in Service During 2008 Tax Year Using the Alternative Depreciation System**

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year			40 yrs.	MM	S/L	

**Part IV Summary (See instructions.)**

21	Listed property. Enter amount from line 28	21	
22	<b>Total.</b> Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instr	22	<b>135</b>
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2008)

DAA

**There are no amounts for Page 2**



## Federal Statements

Statement 1 - Form 990-EZ, Part I, Line 10 - Grants and Similar Amounts Paid

Name and Address	Relationship to Organization		Class of Activity		Date of Gift	Purpose
	Cash Contribution	Noncash Contribution	Book Value	Book Value Explanation	FMV Explanation	
SEE ATTACHED STATEMENT						
	124,952					
Total	124,952					

**Federal Statements****Statement 2 - Form 990-EZ, Part I, Line 16 - Other Expenses**

<u>Description</u>	<u>Amount</u>
FUNDRAISER - GOLF TOURNEY	\$
GREEN FEES/CARTS, ETC.	9,035
SPONSOR SIGNS	300
AWARDS	1,099
MISCELLANEOUS EXPENSES	1,904
 FUNDRAISER - DIPPIN' DOTS	
PRODUCT/SUPPLIES FOR BOOT	9,105
Total	\$ <u>21,443</u>

**Statement 3 - Form 990-EZ, Part I, Line 20 - Other Changes in Net Assets or Fund Balances**

<u>Description</u>	<u>Amount</u>
PRIOR YEAR GRANT CHECKS VOIDED	\$ <u>732</u>
Total	\$ <u>732</u>

## Federal Statements

### Statement 4 - Form 990-EZ, Part III - Organization's Primary Exempt Purpose

#### Description

TO PROVIDE FINANCIAL ASSISTANCE VIA GRANTS TO STUDENTS OF  
LUBBOCK ISD WHO PARTICIPATE IN AN ACTIVITY THAT IS BEYOND  
THE SCOPE OF LISD FISCAL POLICY.

**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ, Statement 1**  
**Part I, Line 10: Grants and Similar Amounts Paid**  
**EIN: 75-2200565**

Alderson Band	165.42
Dunbar Middle School PTA	349.18
Atkins Fine Arts	349.18
Cavazos Piano Lab	349.18
Cavazos Band	349.18
Hutch Middle School Choir	349.18
Hutch Middle School Band	349.18
OI Slaton Middle School PTA	349.18
Irons Middle School Band	349.18
Evans Middle School Band Booster	349.18
Megan Mills	232.00
Zachary Hood	431.00
Ethan Komarov	1,057.00
Heather Baumann	478.00
Justin Nail	436.00
Geoff Waller	541.00
Alison Stogner	541.00
Kris Gonzales	604.00
Patrick Tombs	562.00
Geoffrey Nauert	625.00
Katelyn Watkins	646.00
Will Jeffery	499.00
Kodwo Panford	415.00
Neil Hester	916.00
Kelsei Fortenberry	457.00
Kimberly Lundberg	415.00
Jeri Cantrell	436.00
Tad Delano	415.00
Julie Fisher	216.00
Jeff Shirey	312.00
Justin Bedford	2,042.00
Jennifer McGrew	1,863.00
Radiance Hodge	1,047.00
Juan Martinez	415.00
Oscar Meza	562.00
Stephanie Silva	478.00
Cassie Jimenez	436.00
Jolie Williams	499.00
Superintendent's National Merit Scholarsh	3,000.00
National Young Leaders State Conference	400.00
Texas Tech IDEAL	1,294.00
Ronnie Woodard	500.00
Mary O'Briant	500.00
Lillie Kathryn Cooper	985.00
Henrik Zetterstrom	500.00

**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ, Statement 1**  
**Part I, Line 10: Grants and Similar Amounts Paid**  
**EIN: 75-2200565**

Oshadi Wimalaratne	500.00
Jenna Curtis	500.00
Caitlin Stephenson	500.00
Lauren Osborne	500.00
Shelby Syptert	500.00
James Syptert	500.00
Clay Rayburn	500.00
Ashley Shelton	500.00
Rae Ellen Beeck	500.00
Lexi Martin	500.00
Adrienne Rittman	500.00
Katy Gibson	500.00
Savannah Topham	500.00
Sydney Zuber	500.00
Blaire Elbert	500.00
Haley Kinman	500.00
Brogran Alvey	500.00
Madeleine Caffey	500.00
Daley Smith	500.00
Kaitlin Womble	500.00
Jessica Fairley	500.00
Ali Daily	500.00
Braxton Alvery	500.00
Sydney Mitchell	500.00
Meagan Matthews	500.00
Emily Hall	500.00
Avery Lambert	500.00
Myranda Fithen	500.00
Madison Locke	500.00
Abigail Bradshaw	500.00
Averi Cross	500.00
Miranda Mitchell	500.00
Michell Lam	500.00
Nia Leatherwood	500.00
Bryla Birdwell	500.00
Bryce Martinez	500.00
Frazier Aaron	500.00
Emily Osborne	500.00
Lindsey Crumpton	500.00
Bailey Martinez	500.00
Creighton Branch	500.00
Stephanie Jarrett	500.00
Marissa Castillo	500.00
Caroline Henderson	500.00
Brycy Yancy	500.00



**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ, Statement 1**  
**Part I, Line 10: Grants and Similar Amounts Paid**  
**EIN: 75-2200565**

Wendy Kissko	200.00
Kailee King	500.00
Shannon Duggan	400.00
Clanssa Baker	500.00
Rachael Henderson	500.00
Christopher Casanova	700.00
Austin Jung	500.00
Toni Marie Garza	700.00
Amanda Mills	500.00
Heather Cox	500.00
Alexis Markwell	950.00
Bayless Drum	250.00
Aubree Reynolds	275.00
Kathryn Miller	500.00
Nicholas Curry	500.00
Dorienne Scott	550.00
Nicholas Alexander Bigham	500.00
Nicholas Alexander Bigham	500.00
Savannah Baker	544.00
Texas Tech IDEAL	2,134.00
Chelsea Tibbets	215.30
Danielle Beltran	500.00
Alexis Everett	750.00
West Texas Children's Chorus	2,000.00
Ramona Mittal	486.54
Shabab Ehsan Siddiqui	486.54
Menaka Yadar	486.54
Leena Al-Souki	486.54
Alexandria Rivas	486.54
Devin Cho	486.54
Dawson Land	486.54
Nicholas Lima	486.54
Muchi He	486.54
Tanli Sun	486.54
Amaris Garcia	486.54
West Texas Children's Chorus	4,500.00
Natalie Upp	326.40
Gregory Arriagi	100.00
Keefe Gallagher	100.00
Montgomery Miller	100.00
David Odell	100.00
Duncan Pasewark	100.00
Kleat Smith	100.00
Brice Sechrish	100.00
Mario Luis Johnathon Chavarria	925.69

**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ, Statement 1**  
**Part I, Line 10: Grants and Similar Amounts Paid**  
**EIN: 75-2200565**

Julio Granados	925.69
Bryah Daniels	1,000.00
Cynthia Medina	1,000.00
Nicholas Isaiah Marmolejo	1,300.00
Rachel Chisholm	922.00
Megan Cline	822.00
Sabiha Armin	100.00
David Chen	100.00
Lynn Capulong	100.00
Alexa Gomez	100.00
Aimi Hardy	100.00
Kelly Jiang	100.00
Chelsea Kidder	100.00
Kelly Kidder	100.00
Kalhan Koul	100.00
Peter Lee	100.00
Varsha Misra	100.00
Becky O'Briant	100.00
Elijahbeth O'Briant	100.00
Dilini Senadheera	100.00
Ruvinee Senadheera	100.00
Rachel Smith	100.00
Vani Thirumala	100.00
Deesha Tripathy	100.00
Robert Woody	100.00
YuTong (Julia) Zhang	100.00
Katherine Soon	100.00
Chelsea Kidder	100.00
Kelly Kidder	100.00
Kensie Mason	100.00
Rebecca Leigh O'Briant	100.00
Davis Jackson	100.00
Texas Tech IDEAL	13,825.00
Lily Norris	160.00
Kate Camp	160.00
Julia Trevino	160.00
Bailey Vivian	160.00
Rylee Benton	160.00
Sofia Salazar	95.00
Maia Salazar	95.00
Mariza Garcia	125.00
Amy Craig	700.00
Jo Tucker	1,000.00
Stephanie Larremore	589.00
Kimberly Matthews	464.45

**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ, Statement 1**  
**Part I, Line 10: Grants and Similar Amounts Paid**  
**EIN: 75-2200565**

Stacey Hensley	626.94
Penny Carpenter	1,000.00
Tiffany Rundell	662.80
Beth Sallee	336.00
Donna Barbee & Cathryn Thompson	750.00
Laura Locke	1,000.00
Kara Swindell	350.00
David Holt	948.13
Bonnie Bowman	1,000.00
Heather Cammack	1,000.00
Nealy Holly	270.30
LICC, Inc.	945.00
West Texas Children's Chorus	5,000.00
Rosa Llanas	486.54
LICC, Inc.	210.00
Jo Tucker	1,000.00
Gayle Reese	1,000.00
Melinda McGaugh	1,000.00
Shane Burk	265.00
Byron Felty	302.76
Iles Elementary	1,500.00
Parkway Elementary School	<u>1,500.00</u>
<b>Total Grants</b>	<b><u><u>124,951.98</u></u></b>

**FOUNDATION FOR EXCELLENCE**  
**Attachment To 2008 Form 990-EZ**  
**Part IV: List of Officers, Trustees, and Key Employees**  
**EIN: 75-2200565**

**OFFICERS**

Tate	Bob	President	PlainsCapital Bank	Lubbock TX 79413	President 08-10
Havens	Wayne	Secretary, Perm	LISD Superintendent	Lubbock TX 79401	Permanent Secretary
Roark	Tammy	VP of Finance	PlainsCapital Bank	Lubbock TX 79408	Board 07-09, VP Finance 08-10
DeLeon	Laura	VP of Marketing	KCBD - News Channel 11	Lubbock TX 79404	Board 05-07, VP Marketing 07-09
Allen	Cathy	VP of Grants		Lubbock TX 79416	Board 04-09, VP Grants 06-09
Garza	Sonny	VP of Resource	City Bank	Lubbock TX 79408	Board 06-08, 08-10
Garcia	Jacque	Assistant-Finance	Massachusetts Mutual	Lubbock TX 79424	Board 06-08, 08-10
Guerrero	Robert	Assistant-Grants	Hodges Elementary School	Lubbock TX 79412	Board 06-08, 08-10
Dean	Amber	Assistant - Resource	Texas Tech University System	Lubbock TX 79409	Board 07-09

**BOARD MEMBERS**

Acreman	Paul	New Member	UMC Physician Network Services	Lubbock TX 79407	Board 08-10
Aguirre	Martin		Work Source of the South Plains	Lubbock TX 79401	Board 05-07, 07-09
Barber	Stacey	New Member	Crenshaw, Dupree & Milam, L.L.P.	Lubbock TX 79408	Board 08-10
Beasley	Steve		Lubbock Avalanche Journal	Lubbock TX 79408	Board 05-07, 07-09
Bruce	Greg		University Medical Center	Lubbock TX 79408	Board 04-06, 06-08, 08-10
Chapman	Karla J.	New Member	TTUHSC School of Nursing	Lubbock TX 79423	Board 08-10
Collier	Scott		Teinert Commercial Building Service	Lubbock TX 79415	Board 07-09
Comer	Chris	Board Rep	First United Bank	Lubbock TX 79490	Board of Trustees Member, 07-09
Craft	Bill		LISD Facilities	Lubbock TX 79401	Board 07-09
De La Garza	Joel		Western Bank	Lubbock TX 79424	Board 07-09
Driscoll	Terry		LISD Information Systems	Lubbock TX 79401	Board 04-06, 06-08, 08-10
Franklin	Bill	New Member	Boerner, Dennis & Franklin, PLLC	Lubbock TX 79408	Board 08-10
Hill	Darrell		City Bank	Lubbock TX 79408	Board 07-09
Jordan	Randy		Citizens Bank	Lubbock TX 79413	Board 06-08, VP Resource 07-09
Knight	Alicia		Texas Tech University	Lubbock TX 79409	Board 07-09
Martinez	Alex		Atmos Energy	Lubbock TX 79408	Board 05-07, 07-09
Miller	Matt	New Member	Merrill Lynch	Lubbock TX 79410	Board 08-10
Navrkal	Terri		LISD Personnel Department	Lubbock TX 79401	Board 04-10
Owens	Eddie	New Member	United Supermarkets	Lubbock TX 79423	Board 08-10
Robertson	Traci		LISD Purchasing Department	Lubbock TX 79401	Board 04-06, 06-08, 08-10
Salazar	Victor		American State Bank	Lubbock TX 79401	Board 07-09
Simnacher	John		AFLAC	Lubbock TX 79424	Board 05-07, 07-09
Slay	Karen		Volunteer/ Past LISD Board Member	Lubbock TX 79423	Board 06-08, 08-10
Suggs	Brad		Hays Communication	Lubbock TX 79424	Board 07-09
Vogler	Doyle	High School Rep	Lubbock High School	Lubbock TX 79401	Board 05-07, 07-09
Wallace	Cindy	Middle School Rep	Smylie Wilson Middle School	Lubbock TX 79410	Board 08-10
Watson	Mitch	New Member	FB&T Wealth Management	Lubbock TX 79410	Board 08-10
White	Libby		Texas Tech University	Lubbock TX 79424	Board 06-08, 08-10
Wright	Terry		Clifford, Krier, Wilkerson & Wright, PC	Lubbock TX 79401	Board 05-07, 07-09