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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2008

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2008 , or tax year beginning 12-01-2008 and ending 11-30-2009

G

Check all that apply

☐ Initial return

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
SOCIOLOGICAL INITIATIVES FOUNDATION INC

Number and street (or P O box number if mail is not delivered to street address)
C/O GMA FOUNDATIONS 77 summer street No 800

Room/suite

City or town, state, and ZIP code
BOSTON, MA 02110

A Employer identification number

11-2000581

B Telephone number (see the instructions)

(617) 426-7080

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization ☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,531,527

J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	43,950	43,950		
	4 Dividends and interest from securities.	64,844	64,844		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-151,644			
	b Gross sales price for all assets on line 6a 1,387,780				
	7 Capital gain net income (from Part IV , line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	☒ 2,903	2,903		
	12 Total. Add lines 1 through 11	-39,947	111,697		
	13 Compensation of officers, directors, trustees, etc	15,000	3,750		11,250
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	☒ 3,825	1,913		1,912
	c Other professional fees (attach schedule)	☒ 50,301	25,521		24,780
	17 Interest				
	18 Taxes (attach schedule) (see the instructions). . . .	☒ 439	189		250
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	5,342	2,671		2,671
	22 Printing and publications	286	0		286
	23 Other expenses (attach schedule).	☒ 255	0		255
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	75,448	34,044		41,404
	25 Contributions, gifts, grants paid	130,458			130,458
	26 Total expenses and disbursements. Add lines 24 and 25	205,906	34,044		171,862
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-245,853			
	b Net investment income (if negative, enter -0-)		77,653		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	6,693	24,800	24,800
	2	Savings and temporary cash investments	173,624	288,523	288,523
	3	Accounts receivable  _____ Less allowance for doubtful accounts  _____			
	4	Pledges receivable  _____ Less allowance for doubtful accounts  _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach schedule)  _____ Less allowance for doubtful accounts  _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	608,093 	614,425	614,425
	b	Investments—corporate stock (attach schedule)	2,192,268 	2,562,088	2,562,088
	c	Investments—corporate bonds (attach schedule)	110,256 	41,691	41,691
	11	Investments—land, buildings, and equipment basis  _____ Less accumulated depreciation (attach schedule)  _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis  _____ Less accumulated depreciation (attach schedule)  _____			
15	Other assets (describe  _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,090,934	3,531,527	3,531,527	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe  _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here  ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here  ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	3,090,934	3,531,527	
	30	Total net assets or fund balances (see the instructions)	3,090,934	3,531,527	
31	Total liabilities and net assets/fund balances (see the instructions)	3,090,934	3,531,527		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	3,090,934
2	Enter amount from Part I, line 27a	2	-245,853
3	Other increases not included in line 2 (itemize)  _____ 	3	686,446
4	Add lines 1, 2, and 3	4	3,531,527
5	Decreases not included in line 2 (itemize)  _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,531,527

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	SALE OF PUBLICLY TRADED SECURITIES			
b	Capital Gains Dividends		P	
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,362,081		1,539,424	-177,343
b 25,699			25,699
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-177,343
b			25,699
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-151,644
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If “Yes,” the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	192,013	3,872,627	0 049582
2006	176,431	4,175,709	0 042252
2005	183,322	3,845,706	0 047669
2004	209,459	3,894,507	0 053783
2003	169,400	3,887,177	0 043579

2	Total of line 1, column (d).	2	0 236865
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 047373
4	Enter the net value of noncharitable-use assets for 2008 from Part X, line 5.	4	3,123,281
5	Multiply line 4 by line 3.	5	147,959
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	777
7	Add lines 5 and 6.	7	148,736
8	Enter qualifying distributions from Part XII, line 4. If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	171,862

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see the instructions)			
1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1	
b		Date of ruling letter _____ (attach copy of ruling letter if necessary—see instructions)	
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	
3		Add lines 1 and 2.	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	
6		Credits/Payments	
a		2008 estimated tax payments and 2007 overpayment credited to 2008	
b		Exempt foreign organizations—tax withheld at source	
c		Tax paid with application for extension of time to file (Form 8868)	
d		Backup withholding erroneously withheld	
7		Total credits and payments Add lines 6a through 6d.	
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	
11		Enter the amount of line 10 to be Credited to 2009 estimated tax 0 Refunded	

Part VII-AStatements Regarding Activities			
1a		During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	
c		If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.	
c		Did the foundation file Form 1120-POL for this year?.	
d		Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0 (2) On foundation managers \$ 0	
e		Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0	
2		Has the foundation engaged in any activities that have not previously been reported to the IRS?	
3		If "Yes," attach a detailed description of the activities.	
3		Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	
b		If "Yes," has it filed a tax return on Form 990-T for this year?.	
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?	
6		If "Yes," attach the statement required by General Instruction T.	
6		Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either	
7		By language in the governing instrument, or	
8a		By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	
7		Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	
8a		Enter the states to which the foundation reports or with which it is registered (see the instructions) ☒ NY	
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)?	
10		If "Yes," complete Part XIV	
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	

Part VII-A

Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11a		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Web site address ▶ HTTP //COMM-ORG WISC EDU/SIF/				
14	The books are in care of ▶ GMA FOUNDATIONS	Telephone no ▶ (617) 426-7080		
	Located at ▶ 77 SUMMER STREET 8TH FLOOR BOSTON MA	ZIP +4 ▶ 02110		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here			15

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)?	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
b	If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

Continued

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).

Yes

No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see the instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

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

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If you answered "Yes" to 6b, also file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes

No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total

number of other employees paid over \$50,000.

0

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Part VIII Information About Officers and Contractors Continued

3 Five highest-paid independent contractors for professional services—(see the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.	▶	0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses
1		
2		
3		
4		

Part IX-B Summary of Program-Related Investments (see the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See the instructions	
3	
Total Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,128,655
b	Average of monthly cash balances.	1b	42,189
c	Fair market value of all other assets (see the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,170,844
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,170,844
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see the instructions).	4	47,563
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,123,281
6	Minimum investment return. Enter 5% of line 5.	6	156,164

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	156,164
2a	Tax on investment income for 2008 from Part VI, line 5.	2a	777
b	Income tax for 2008 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	777
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	155,387
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	155,387
6	Deduction from distributable amount (see the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	155,387

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	171,862
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	171,862
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	777
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	171,085

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7			
2	Undistributed income, if any, as of the end of 2007			
a	Enter amount for 2007 only. 52,802			
b	Total for prior years 20____, 20____, 20____ 0			
3	Excess distributions carryover, if any, to 2008			
a	From 2003.			
b	From 2004.			
c	From 2005.			
d	From 2006.			
e	From 2007.			
f	Total of lines 3a through e. 0			
4	Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 171,862			
a	Applied to 2007, but not more than line 2a 52,802			
b	Applied to undistributed income of prior years (Election required—see the instructions). 0			
c	Treated as distributions out of corpus (Election required—see the instructions). 0			
d	Applied to 2008 distributable amount. 119,060			
e	Remaining amount distributed out of corpus 0			
5	Excess distributions carryover applied to 2008 0			
(If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:			
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5 0			
b	Prior years' undistributed income Subtract line 4b from line 2b. 0			
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. 0			
d	Subtract line 6c from line 6b Taxable amount—see the instructions. 0			
e	Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount—see the instructions. 0			
f	Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008. 36,327			
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions). 0			
8	Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions). 0			
9	Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a. 0			
10	Analysis of line 9			
a	From 2004.			
b	From 2005.			
c	From 2006.			
d	From 2007.			
e	From 2008.			

Part XIV

Private Operating Foundations (see the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2008, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2008	(b) 2007	(c) 2006	(d) 2005	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here

if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the organization makes gifts, grants, etc. (see the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

PRENTICE ZINN
C/O GMA FOUNDATIONS 77 SUMMER STre
BOSTON,MA 021101006
(617) 426-7080

b

The form in which applications should be submitted and information and materials they should include

APPLICANTS SHOULD SUBMIT THEIR CONCEPT APPLICATION ONLINE VIA THE FOUNDATION'S WEBSITE (PAGE 5, PART VII-A OF FORM 990-PF) OR SUBMIT EIGHT PAPER COPIES FOLLOWING THE OUTLINE AND CHARACTER LIMIT FROM THE ONLINE FORM. PAPER APPLICATIONS NOT FOLLOWING THESE LIMITS, OR SUBMITTING ADDITIONAL MATERIALS, MAY BE SUBJECT TO AUTOMATIC REJECTION. NO FAX OR E-MAIL APPLICATIONS WILL BE ACCEPTED. THE FOUNDATION NOTIFIES APPLICANTS WHO HAVE SUBMITTED CONCEPT APPLICATIONS IF THEIR PRELIMINARY REQUEST HAS BEEN ACCEPTED BY THE TRUSTEES AND A FULL PROPOSAL WILL BE CONSIDERED. GENERAL INSTRUCTIONS AND AN APPLICATION FORM WILL BE SENT OUT WITH THE LETTER OF NOTIFICATION. FROM TIME TO TIME, THE TRUSTEES REVIEW THESE GUIDELINES AND MAY MAKE CHANGES WITHOUT NOTICE.

c

Any submission deadlines

CONCEPT APPLICATION-AUGUST 15, FULL PROPOSAL-NOVEMBER 15, GRANTS AWARDED-JANUARY

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

GRANT RECIPIENTS SHOULD WAIT ONE YEAR BEFORE SUBMITTING A NEW REQUEST. ORGANIZATIONS WHOSE CONCEPT APPLICATIONS OR FULL PROPOSALS ARE DENIED MAY RE-APPLY AFTER ONE FULL YEAR FROM THE DATE OF THE NOTIFICATION OF THE DENIAL. THE FOUNDATION WILL NOT CONSIDER PROPOSALS THAT: 1) REPRESENT THE WORK OF A LONE ACADEMIC WITHOUT A STRONG RELATIONSHIP WITH A CONSTITUENCY OR ORGANIZATION, 2) DO NOT DEMONSTRATE THE CAPACITY OR INTENT TO CARRY OUT BONA FIDE RESEARCH, AS INDICATED BY EITHER A PAST TRACK RECORD OR A CREDENTIALIED RESEARCH PARTNER, 3) ARE LED BY GOVERNMENT/MUNICIPAL AGENCIES, 4) RESULT ONLY IN REPORTS, PUBLICATIONS, GOVERNMENT/MUNICIPAL AGENCIES, 4) RESULT ONLY IN REPORTS, PUBLICATIONS, WEBSITES, GATHERINGS, FILMS, THEATRICAL PRODUCTIONS, CONCERTS, CONFERENCES, OR THE LIKE THAT ARE NOT PART OF A LARGER EXPLICIT SOCIAL CHANGE STRATEGY, 5) ONLY EVALUATE EXISTING PROGRAMS, AND 6) REQUEST FUNDS FOR OPERATING SUPPORT OR CAPITAL GRANTS.

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	130,458
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	43,950	
4 Dividends and interest from securities.			14	64,844	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.			14	2,903	
8 Gain or (loss) from sales of assets other than inventory			18	-151,644	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. . .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). . .		0		-39,947	0
13 Total. Add line 12, columns (b), (d), and (e). 13					-39,947

[illegible]

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting organization to a noncharitable exempt organization of		
	(1) Cash.	1a(1)	No
	(2) Other assets.	1a(2)	No
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)	No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)	No
	(3) Rental of facilities, equipment, or other assets.	1b(3)	No
	(4) Reimbursement arrangements.	1b(4)	No
	(5) Loans or loan guarantees.	1b(5)	No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)	No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c	No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
	*****		2010-04-22	*****	
	Signature of officer or trustee		Date	Title	
Paid Preparer's Use Only	Preparer's Signature ALFONSO PERILLO		Date 2010-04-22	Check if self-employed ☒	Preparer's SSN or PTIN (See Signature in the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code EDELSTEIN AND COMPANY LLP 160 Federal StREET 9TH FLOOR BOSTON, MA 021101772		EIN		
			Phone no (617) 227-6161		

Additional Data

Software ID: 08000094
Software Version: 2008.05060
EIN: 11-2000581
Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

Form 990PF PartVIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GLENN JaCOBS	PRESIDENT 0 50	3,000	0	0
C/O GMA FOUNDATIONS 77 SUMMER STREET 8TH FL BOSTON,MA 021101006				
BARBARA FREED	VICE PRESIDENT 0 50	3,000	0	0
C/O GMA FOUNDATIONS 77 SUMMER STREET 8TH FL BOSTON,MA 021101006				
IRENE THOMSON	TREASURER & SECRETARY 0 50	3,000	0	0
C/O GMA FOUNDATIONS 77 SUMMER STREET 8TH FL BOSTON,MA 021101006				
RANDY STOECKER	DIRECTOR 0 50	3,000	0	0
C/O GMA FOUNDATIONS 77 SUMMER STREET 8TH FL BOSTON,MA 021101006				
RAMONA HERNANDEZ	DIRECTOR 0 50	3,000	0	0
C/O GMA FOUNDATIONS 77 SUMMER STREET 8TH FL BOSTON,MA 021101006				

Form 990PF Part XV Line 3a - Grants and Contributions Paid During the Year

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
UNIVERSITY OF MASSACHUSETTS BOSTON - CENTER FOR SOCIAL POLICY 100 MORRISSEY BOULEVARD BOSTON,MA 02125	N/A	501(c)(3)	PROGRAM SUPPORT	20,000
GEORGE MASON UNIVERSITY - CENTER FOR SOCIAL SCIENCE RESEARCH 4400 UNIVERSITY DRIVE FAIRFAX,VA 22030	N/A	501(c)(3)	PROGRAM SUPPORT	20,000
MIDDLE TENNESSEE JOBS WITH JUSTICE 1334 LISCHHEY AVENUE NASHVILLE,TN 37207	N/A	501(c)(3)	PROGRAM SUPPORT	15,000
PLANNED PARENTHOOD OF NEW YORK CITY INC 26 BLEECKER STREET NEW YORK,NY 10012	N/A	501(c)(3)	PROGRAM SUPPORT	19,458
RESTAURANT OPPORTUNITIES UNITED 275 SEVENTH AVENUE 23RD FLOOR NEW YORK,NY 10001	N/A	501(c)(3)	PROGRAM SUPPORT	20,000
RURAL ACTION INC PO BOX 157 TRIMBLE,OH 45782	N/A	501(c)(3)	PROGRAM SUPPORT	20,000
SOUTH FLORIDA JOBS WITH JUSTICE 1671 NW 16 TERRACE MIAMI,FL 33125	N/A	501(c)(3)	PROGRAM SUPPORT	15,000
VOICES OF WOMEN ORGANIZING PROJECT PO BOX 20181 GREELEY SQUARE STATION NEW YORK,NY 10001	N/A	501(c)(3)	PROGRAM SUPPORT	1,000
Total  3a				130,458

TY 2008 Accounting Fees Schedule

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

EIN: 11-2000581

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	3,825	1,913		1,912

**TY 2008 Investments Corporate
Bonds Schedule**

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC
EIN: 11-2000581

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS - BOSTON TRUST	41,691	41,691

TY 2008 Investments Corporate Stock Schedule

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

EIN: 11-2000581

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK - WELLS FARGO (FORMERLY WACHOVIA)	1,452,158	1,452,158
CORPORATE STOCK - BOSTON TRUST	1,109,930	1,109,930

TY 2008 Other Expenses Schedule

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

EIN: 11-2000581

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charit able Purposes
MISCELLANEOUS EXPENSES	255	0		255

TY 2008 Other Income Schedule

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

EIN: 11-2000581

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
INVESTMENT LITIGATION SETTLEMENTS	282	282	282
AMORTIZATION OF BOND DISCOUNT	2,621	2,621	2,621

TY 2008 Other Increases Schedule**Name:** SOCIOLOGICAL INITIATIVES FOUNDATION INC**EIN:** 11-2000581

Description	Amount
Unrealized GAIN on investments	678,214
FEDERAL EXCISE TAX REFUNDS	8,232

TY 2008 Other Professional Fees Schedule**Name:** SOCIOLOGICAL INITIATIVES FOUNDATION INC**EIN:** 11-2000581

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Grant administration	24,780	0		24,780
Investment Management	25,521	25,521		0

TY 2008 Taxes Schedule

Name: SOCIOLOGICAL INITIATIVES FOUNDATION INC

EIN: 11-2000581

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	250	0		250
FOREIGN TAXES ON INCOME	189	189		0