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Form **990**

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 1545-0047

2009

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

A For the 2009 calendar year, or tax year beginning **JUL 1, 2009** and ending **JUN 30, 2010**

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type See Specific Instructions	C Name of organization SHAKER SCHOOLS FOUNDATION		D Employer identification number 34-1351470	
		Doing Business As		E Telephone number 216-295-1400	
		Number and street (or P O box if mail is not delivered to street address)	Room/suite	G Gross receipts \$ 913,185.	
		15600 PARKLAND DRIVE		H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
City or town, state or country, and ZIP + 4 SHAKER HEIGHTS, OH 44120		H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No			
F Name and address of principal officer: JOHN MURPHY 15600 PARKLAND DRIVE, SHAKER HEIGHTS, OH 44		H(c) Group exemption number ▶			
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c) (3) (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527					
J Website: ▶ WWW.SHAKER.ORG/FOUNDATION/					
K Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶			L Year of formation 1981	M State of legal domicile OH	

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities. PROVIDE RESOURCES TO ENRICH THE EDUCATION EXPERIENCES OF STUDENTS IN THE SHAKER CITY SCHOOL DISTRICT		
	2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	20
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	20
	5 Total number of employees (Part V, line 2a)	5	3
	6 Total number of volunteers (estimate if necessary)	6	40
	7a Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0.
b Net unrelated business taxable income from Form 990-T, line 34	7b	0.	
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year 324,550.	Current Year 321,797.
	9 Program service revenue (Part VIII, line 2g)		
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<108,225.>	31,436.
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	78,635.	104,849.
	12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	294,960.	458,082.
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)	296,842.	344,911.
	14 Benefits paid to or for members (Part IX, column (A), line 4)		
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	57,405.	59,655.
	16a Professional fundraising fees (Part IX, column (A), line 11e)		
	b Total fundraising expenses (Part IX, column (D), line 25) ▶ 29,827.		
17 Other expenses (Part IX, column (A), lines 11a-11d, 11f, 24f)	42,405.	40,372.	
18 Total expenses Add lines 13, 17 (must equal Part IX, column (A), line 25)	396,652.	444,938.	
19 Revenue less expenses Subtract line 18 from line 12	<101,692.>	13,144.	
Net Assets or Fund Balances	20 Total assets (Part X, line 16)	Beginning of Current Year 1,187,664.	End of Year 1,289,558.
	21 Total liabilities (Part X, line 26)	2,707.	2,398.
	22 Net assets or fund balances Subtract line 21 from line 20	1,184,957.	1,287,160.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here ▶ *John Murphy* President 3/8/11
 Signature of officer Date
 ▶ **JOHN MURPHY, PRESIDENT**
 Type or print name and title

Paid Preparer's Use Only
 Preparer's signature ▶ *Harry A. Slocum CPA* Date **3/5/11** Check if self-employed Preparer's identifying number (see instructions) **000448030**
 Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ **THE D'AMORE TATMAN GROUP LLC**
3659 GREEN ROAD, SUITE 124
BEACHWOOD, OHIO 44122
 EIN ▶ Phone no ▶ **216-378-1550**

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

Handwritten initials

SCANNED MAR 28 2011

Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission: SEE SCHEDULE O FOR CONTINUATION TO PROVIDE RESOURCES TO ENRICH THE EDUCATION EXPERIENCES OF STUDENTS IN THE SHAKER HEIGHTS CITY SCHOOL DISTRICT. PRIMARILY, THE FOUNDATION HELPS EXPAND CLASSROOM INTRUCTION AT ALL GRADE LEVELS WITH GRANTS TO TEACHERS AND FOR PROJECTS; MAKES AWARDS TO INDIVIDUAL STUDENTS TO

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No If 'Yes,' describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No If 'Yes,' describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported SEE SCHEDULE O FOR CONTINUATION(S)

4a (Code:) (Expenses \$ 344,911. including grants of \$) (Revenue \$) AS ARTICLE THREE, PARAGRAPH 1(1) OF THE ARTICLES OF INCORPORATION STATES, THE ORGANIZATION SUPPORTS SELECTED CURRICULAR AND EXTRACURRICULAR ACTIVITES, PROGRAMS AND FACILITIES OF THE PUBLIC SCHOOLS OPERATED BY THE BOARD OF EDUCATION OF THE SHAKER HEIGHTS (OHIO) CITY SCHOOL DISTRICT (THE "SHAKER HEIGHTS BOARD OF EDUCATION"). IT WILL ENHANCE THE ABILITY OF THE SHAKER HEIGHTS BOARD OF EDUCATION TO PROVIDE PUBLIC SCHOOL EDUCATIONAL OPPORTUNITIES OF THE HIGHEST POSSIBLE QUALITY AND OF GRADUATES OF PUBLIC SCHOOLS OPERATED BY SUCH SCHOOLS TO PURSUE POST-SECONDARY EDUCATIONAL OPPORTUNITIES.

THE ORGANIZATION WORKS TOWARD A GOAL OF ATTRACTING THE PERSONAL SUPPORT AND FINANCIAL ASSISTANCE OF CONCERNED INDIVIDUALS WHO SHARE ITS GOAL OF

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ► \$ 344,911.

Part IV Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		X
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>		
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	X	
11	Is the organization's answer to any of the following questions "Yes"? <i>If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
	• Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i>		
	• Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		
	• Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		
	• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i>		
	• Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>		
	• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? <i>If "Yes," complete Schedule D, Part X.</i>		
12	Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>		X
12A	Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional</i>	Yes	No
			X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? <i>If "Yes," complete Schedule F, Part I</i>		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	X	
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20	Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II		X
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	X	
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? If "Yes," complete Schedule L, Part III		X
28 Was the organization a party to a business transaction with one of the following parties, (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV		X
c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV		X
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	X	
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I		X
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19?	X	

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U S Information Returns. Enter -0- if not applicable		
1a	6		
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1b	0		
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2a	3		
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4b	If "Yes," enter the name of the foreign country: _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	X	
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7d	If "Yes," indicate the number of Forms 8282 filed during the year		
7e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		X
7h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		X
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		X
9	Sponsoring organizations maintaining donor advised funds.		
9a	Did the organization make any taxable distributions under section 4966?		X
9b	Did the organization make a distribution to a donor, donor advisor, or related person?		X
10	Section 501(c)(7) organizations. Enter		
10a	Initiation fees and capital contributions included on Part VIII, line 12		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11	Section 501(c)(12) organizations. Enter:		
11a	Gross income from members or shareholders		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body		
1b	Enter the number of voting members that are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a material diversion of the organization's assets?		X
6	Does the organization have members or stockholders?		X
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
7b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
a	The governing body?	X	
b	Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Does the organization have local chapters, branches, or affiliates?		X
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	X	
11A	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	X	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	X	
13	Does the organization have a written whistleblower policy?	X	
14	Does the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a	The organization's CEO, Executive Director, or top management official		X
b	Other officers or key employees of the organization	X	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (See instructions)		
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed **OH**
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **SHAKER SCHOOLS FOUNDATION - 216-295-4329**
15600 PARKLAND DRIVE, SHAKER HEIGHTS, OH 44120

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former** directors or trustees that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if the organization did not compensate any current officer, director, or trustee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
JOHN MURPHY PRESIDENT		X		X				0.	0.	0.
SUSAN STARRETT DIRECTOR OF DEVELOPMENT	32.00	X						59,655.	0.	0.
LAWRENCE POLLACK VICE PRESIDENT		X		X				0.	0.	0.
CRAIG STOUT TREASURER		X		X				0.	0.	0.
SARAJANE DOLINSKY SECRETARY		X		X				0.	0.	0.
JOAN BALL TRUSTEE		X						0.	0.	0.
STUART ABRAMS TRUSTEE		X						0.	0.	0.
ROBIN JOHNSON TRUSTEE		X						0.	0.	0.
DEBORAH COWAN TRUSTEE		X						0.	0.	0.
KATHERINE EMERSON TRUSTEE		X						0.	0.	0.
MARK FREEMAN TRUSTEE		X						0.	0.	0.
ANN GARSON TRUSTEE		X						0.	0.	0.
DEREK GREEN TRUSTEE		X						0.	0.	0.
GRETCHEN HESS TRUSTEE		X						0.	0.	0.
KATHY JONES TRUSTEE		X						0.	0.	0.
NANCY KARR TRUSTEE		X						0.	0.	0.
MATT LEHMAN TRUSTEE		X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
GILBERT LOWENTHAL TRUSTEE		X						0.	0.	0.
JESSICA SEMEL TRUSTEE		X						0.	0.	0.
ANNETTE TUCKER SUTHERLAND TRUSTEE		X						0.	0.	0.
ROBIN WEAVER TRUSTEE		X						0.	0.	0.
JOHN YOUNG TRUSTEE		X						0.	0.	0.
STEPHANIE TURNER TRUSTEE		X						0.	0.	0.
1b Total								59,655.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **0**

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual		X
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. **NONE**

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

Part VIII		Statement of Revenue		(A)	(B)	(C)	(D)	
				Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1 a	Federated campaigns	1a					
	b	Membership dues	1b					
	c	Fundraising events	1c					
	d	Related organizations	1d					
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	321,797.				
	g	Noncash contributions included in lines 1a-1f \$		26,884.				
	h	Total. Add lines 1a-1f		321,797.				
Program Service Revenue	2 a		Business Code					
	b							
	c							
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f						
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		25,884.			25,884.	
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
	6 a	Gross Rents	(i) Real	(ii) Personal				
		Less: rental expenses						
		Rental income or (loss)						
		Net rental income or (loss)						
	7 a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		Less: cost or other basis and sales expenses						
		Gain or (loss)						
		Net gain or (loss)			5,552.			5,552.
	8 a	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a		191,915.			
		Less: direct expenses	b		87,066.			
	c	Net income or (loss) from fundraising events			104,849.			104,849.
	9 a	Gross income from gaming activities. See Part IV, line 19	a					
Less: direct expenses		b						
Net income or (loss) from gaming activities								
10 a	Gross sales of inventory, less returns and allowances	a						
	Less: cost of goods sold	b						
	Net income or (loss) from sales of inventory							
Miscellaneous Revenue		Business Code						
11 a								
	b							
	c							
	d	All other revenue						
	e	Total. Add lines 11a-11d						
12	Total revenue. See instructions			458,082.	0.	0.	136,285.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21				
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22	344,911.	344,911.		
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	59,655.		29,828.	29,827.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services See Part IV, line 17				
f Investment management fees				
g Other				
12 Advertising and promotion				
13 Office expenses				
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance				
24 Other expenses Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a PORTFOLIO MGMT & ADMIN	40,372.		40,372.	
b				
c				
d				
e				
f All other expenses				
25 Total functional expenses. Add lines 1 through 24f	444,938.	344,911.	70,200.	29,827.
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year	
Assets	1 Cash - non-interest-bearing		1		
	2 Savings and temporary cash investments	305,750.	2	217,912.	
	3 Pledges and grants receivable, net		3		
	4 Accounts receivable, net		4		
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		5		
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6		
	7 Notes and loans receivable, net		7		
	8 Inventories for sale or use		8		
	9 Prepaid expenses and deferred charges		9		
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a		10c	
	b Less accumulated depreciation	10b			
	11 Investments - publicly traded securities	871,914.	11	1,065,271.	
	12 Investments - other securities. See Part IV, line 11		12		
	13 Investments - program-related. See Part IV, line 11		13		
	14 Intangible assets		14		
	15 Other assets See Part IV, line 11	10,000.	15	6,375.	
16 Total assets. Add lines 1 through 15 (must equal line 34)	1,187,664.	16	1,289,558.		
Liabilities	17 Accounts payable and accrued expenses		17		
	18 Grants payable		18		
	19 Deferred revenue		19		
	20 Tax-exempt bond liabilities		20		
	21 Escrow or custodial account liability Complete Part IV of Schedule D		21		
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		22		
	23 Secured mortgages and notes payable to unrelated third parties		23		
	24 Unsecured notes and loans payable to unrelated third parties		24		
	25 Other liabilities. Complete Part X of Schedule D	2,707.	25	2,398.	
	26 Total liabilities. Add lines 17 through 25	2,707.	26	2,398.	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.				
	27 Unrestricted net assets	131,934.	27	190,104.	
	28 Temporarily restricted net assets	297,125.	28	232,874.	
	29 Permanently restricted net assets	755,898.	29	864,182.	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.				
	30 Capital stock or trust principal, or current funds		30		
	31 Paid-in or capital surplus, or land, building, or equipment fund		31		
	32 Retained earnings, endowment, accumulated income, or other funds		32		
	33 Total net assets or fund balances	1,184,957.	33	1,287,160.	
	34 Total liabilities and net assets/fund balances	1,187,664.	34	1,289,558.	

Form 990 (2009)

Part XI Financial Statements and Reporting

1 Accounting method used to prepare the Form 990: Cash Accrual Other _____

If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O

2a Were the organization's financial statements compiled or reviewed by an independent accountant?

b Were the organization's financial statements audited by an independent accountant?

c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O

d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:

Separate basis Consolidated basis Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Form 990 (2009)

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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	387,666.	281,555.	547,989.	324,550.	321,797.	1863557.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	387,666.	281,555.	547,989.	324,550.	321,797.	1863557.
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)						308,173.
6 Public support. Subtract line 5 from line 4						1555384.

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	387,666.	281,555.	547,989.	324,550.	321,797.	1863557.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	46,523.	38,793.	67,114.	25,964.	25,884.	204,278.
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 Total support. Add lines 7 through 10						2067835.
12 Gross receipts from related activities, etc. (see instructions)					12	977,039.
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 ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	75.22	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	82.58	%
16a 33 1/3% support test - 2009. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶ <input checked="" type="checkbox"/>			
b 33 1/3% support test - 2008. 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 ▶ <input type="checkbox"/>			
17a 10% -facts-and-circumstances test - 2009. 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 ▶ <input type="checkbox"/>			
b 10% -facts-and-circumstances test - 2008. 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 ▶ <input type="checkbox"/>			
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 ▶ <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) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13 Total support (Add lines 9, 10c, 11, and 12)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ▶ <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2009.** 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 - 2008.** 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 D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization **SHAKER SCHOOLS FOUNDATION** Employer identification number **34-1351470**

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?		<input type="checkbox"/> Yes <input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?		<input type="checkbox"/> Yes <input type="checkbox"/> No

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

Preservation of land for public use (e.g., recreation or pleasure) Preservation of an historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

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

	Held at the End of the Tax Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

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

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

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

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

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

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

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

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

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

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

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a Public exhibition
- b Scholarly research
- c Preservation for future generations
- d Loan or exchange programs
- e Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Escrow and Custodial Arrangements. Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No

b If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
1c	
1d	
1e	
1f	

- c Beginning balance
- d Additions during the year
- e Distributions during the year
- f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

b If "Yes," explain the arrangement in Part XIV

Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	755,898.	771,665.			
b Contributions	100,065.	121,687.			
c Net investment earnings, gains, and losses	54,888.				
d Grants or scholarships	46,668.	137,454.			
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance	864,182.	755,898.			

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ▶ 0.00 %
- b Permanent endowment ▶ 100.00 %
- c Term endowment ▶ 0.00 %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

	Yes	No
3a(i) unrelated organizations		X
3a(ii) related organizations		X
3b		

- (i) unrelated organizations
- (ii) related organizations

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

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

Part VI Investments - Land, Buildings, and Equipment. See Form 990, Part X, line 10

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other				

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c)) ▶ 0.

Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	458,082.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	444,938.
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	13,144.
4	Net unrealized gains (losses) on investments	4	89,059.
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV.)	8	
9	Total adjustments (net). Add lines 4 through 8	9	89,059.
10	Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9	10	102,203.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	552,537.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	89,059.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV.)	2d	<81,670.>
e	Add lines 2a through 2d	2e	7,389.
3	Subtract line 2e from line 1	3	545,148.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	<87,066.>
c	Add lines 4a and 4b	4c	<87,066.>
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	458,082.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	487,048.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV.)	2d	42,110.
e	Add lines 2a through 2d	2e	42,110.
3	Subtract line 2e from line 1	3	444,938.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	444,938.

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4, Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2, Part XI, line 8; Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

GAAP CONVERSION ACCRUAL TO CASH: -81670.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

EXPENSES INCLUDED ON FORM 990, PART VIII LINE 12 BUT NOT INCLUDED IN LINE 1: -87066.

Part XIV Supplemental Information (continued)

PART XIII, LINE 2D - OTHER ADJUSTMENTS:

GAAP CONVERSION ACCRUAL TO CASH: -44956.

EXPENSES INCLUDED ON LINE 1 BUT NOT INCLUDED ON FORM 990, PART

IX, LINE 25: : 87066.

Multiple horizontal lines for supplemental information.

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 (add col (a) through col (c))	
		RED & WHITE (event type)	(event type)	NONE (total number)		
1	Gross receipts	191,915.			191,915.	
2	Less: Charitable contributions					
3	Gross income (line 1 minus line 2)	191,915.			191,915.	
Direct Expenses	4	Cash prizes				
	5	Noncash prizes				
	6	Rent/facility costs	20,000.			20,000.
	7	Food and beverages	52,574.			52,574.
	8	Entertainment	1,375.			1,375.
	9	Other direct expenses	13,117.			13,117.
	10	Direct expense summary Add lines 4 through 9 in column (d)				(87,066)
	11	Net income summary. Combine line 3, column (d), and line 10				104,849.

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	Noncash prizes			
	4	Rent/facility costs			
	5	Other direct expenses			
6	Volunteer labor	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
7	Direct expense summary Add lines 2 through 5 in column (d)				()
8	Net gaming income summary Combine line 1, column (d), and line 7				

	Yes	No
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. _____	9a	
10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? b If "Yes," explain: _____	10a	
11 Does the organization operate gaming activities with nonmembers?	11	
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?	12	

13 Indicate the percentage of gaming activity operated in.

a The organization's facility

b An outside facility

13a	%
13b	%

14 Enter 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 contract 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 of the third party

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 to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ _____

SHAKER SCHOOLS FOUNDATION

Part III Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Use Part IV and Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance
SEE EXHIBIT "A"	0	0.	0.		

Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

SCHEDULE I, PART I, LINE 2: SEE EXHIBIT "B"

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

▶ **Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.**
▶ **Attach to Form 990.**

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization: **SHAKER SCHOOLS FOUNDATION**
Employer identification number: **34-1351470**

Part I	Types of Property	(a) Check if applicable	(b) Number of contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
1	Art - Works of art				
2	Art - Historical treasures				
3	Art - Fractional interests				
4	Books and publications				
5	Clothing and household goods				
6	Cars and other vehicles				
7	Boats and planes				
8	Intellectual property				
9	Securities - Publicly traded	X	4	26,884.	AVE FMV DATE CONTRIB
10	Securities - Closely held stock				
11	Securities - Partnership, LLC, or trust interests				
12	Securities - Miscellaneous				
13	Qualified conservation contribution - Historic structures				
14	Qualified conservation contribution - Other				
15	Real estate - Residential				
16	Real estate - Commercial				
17	Real estate - Other				
18	Collectibles				
19	Food inventory				
20	Drugs and medical supplies				
21	Taxidermy				
22	Historical artifacts				
23	Scientific specimens				
24	Archeological artifacts				
25	Other ▶ (_____)				
26	Other ▶ (_____)				
27	Other ▶ (_____)				
28	Other ▶ (_____)				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgment

29

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?

	Yes	No
30a		X
31		X
32a		X

b If "Yes," describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

b If "Yes," describe in Part II

33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II

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

Schedule M (Form 990) 2009

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

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

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization

SHAKER SCHOOLS FOUNDATION

Employer identification number
34-1351470

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

RECOGNIZE THEIR ACADEMIC SUCCESS AND ENCOURAGE THEIR PURSUIT OF
ADVANCED STUDIES; AND PROVIDES SUPPORT FOR IMPROVEMENTS TO LEARNING
ENVIRONMENTS.

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

ENHANCING OPPORTUNITIES WITHIN THE SCHOOL DISTRICT FOR QUALITY PUBLIC
SCHOOL EDUCATION AT THE PRIMARY AND SECONDARY LEVELS. THE TYPES OF
SUPPORT WHICH THE ORGANIZATION PROVIDES FOR THE PUBLIC SCHOOLS WITHIN
THE SCHOOL DISTRICT INCLUDE'S SUCH DIVERSE PROJECTS AS EXPENDING FUNDS
TO ASSIST IN PROVIDING SPECIAL AREAS OF STUDY IN THE CURRICULUM,
AWARDING CONTINUING EDUCATION HONORARIUM GRANTS TO FACULTY MEMBERS, AND
PROVIDING FUNDS TO INCREASE STUDENT ACCESS TO TECHNOLOGY. THE
REQUIREMENT OF REPRESENTATION ON THE BOARD OF TRUSTEES OF THE
ORGANIZATION BY A MEMBER OF THE SHAKER HEIGHTS BOARD OF EDUCATION
ENSURES THAT THE ORGANIZATION'S ACTIVITIES ARE CONSISTENT WITH THOSE OF
THE BOARD OF EDUCATION.

ALL STUDENTS WHO RECEIVE AWARDS WERE SELECTED BASED UPON
RECOMMENDATIONS BY THE HIGH SCHOOL PRINCIPAL, APPROPRIATE DEPARTMENT
CHAIRS AND GUIDANCE COUNSELORS. NONE OF THE RECIPIENTS ARE RELATED TO
ANY OF THE TRUSTEES OF THE SHAKER SCHOOLS FOUNDATION.

FORM 990, PART VI, SECTION B, LINE 11: A "DRAFT" COPY OF THE 990 IS
REVIEWED DIRECTLY BY THE PRESIDENT, EXECUTIVE DIRECTOR AND THE CHAIRMAN OF
THE FINANCE COMMITTEE FOR ACCURACY, MATERIAL MISSTATEMENTS AND

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

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

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization

SHAKER SCHOOLS FOUNDATION

Employer identification number

34-1351470

EXTRAORDINARY ITEMS. ONCE APPROVED, THE RETURN IS PROCESSED AND A COPY OF THE RETURN IS SENT TO EACH VOTING BOARD MEMBER (VIA EMAIL OR HARD COPY) PRIOR TO THE RETURN BEING FILED.

FORM 990, PART VI, SECTION B, LINE 12C: BOARD TRUSTEE, EMPLOYEE OR VOLUNTEER OF THE SHAKER SCHOOL FOUNDATION SHALL AVOID ANY CONFLICT, INCLUDING THE APPEARANCE OF CONFLICT BETWEEN HIS OR HER PERSONAL INTERESTS AND THE INTERESTS OF THE FOUNDATION WHEN ACTING FOR OR REPRESENTING THE FOUNDATION OR WHEN DEALING WITH ANY ORGANIZATION OR INDIVIDUAL WHOSE OBJECTIVES OR INTERST MAY BE ADVERSE TO SPECIFIC INTEREST OF THE FOUNDATION. EACH BOARD TRUSTEE SHALL DISCLOSE ANY POSSIBLE CONFLICT OF INTEREST IN A TIMELY MANNER. EACH SEPTEMBER, SUCH DISCLOSURE SHALL BE IN THE FORM OF AN ANNUAL DISCLOSURE OF INTEREST CERTIFICATE TO BE SIGNED BY EACH BOARD MEMBER, IN WHICH EACH SHALL INDICATE THAT HE OR SHE IS FAMILIAR WITH THIS POLICY AND HAS DISCLOSED OR IS DISCLOSING ALL KNOWN SITUATIONS THAT COULD POTENTIALLY INVOLVE A POSSIBLE CONFLICT OF INTEREST.

FORM 990, PART VI, SECTION B, LINE 15B: THE BOARD PRESIDENT CONDUCTS AN ANNUAL REVIEW OF THE DIRECTOR OF DEVELOPMENT, BASED ON INPUT FROM THE EXECUTIVE DIRECTOR AND THE BOARD'S EXECUTIVE COMITTEE. THE DEVELOPMENT DIRECTOR ALSO MEETS WITH THE FOUNDATON'S TWO EMPLOYEES AFTER RECEIVING FEEDBACK FROM THE EXECUTIVE DIRECTOR. ANY MERIT RAISES ARE BASED ON COMPENSATION PRACTICES OF THE SHAKER HEIGHTS CITY SCHOOL DISTRICT.

FORM 990, PART VI, SECTION C, LINE 19: ALL COPIES OF THE ORGANIZATION'S GOVERNING DOCUMENTS AND AUDITED FINANCIAL STATEMENTS ARE MADE AVAILABLE TO

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

Schedule O (Form 990) 2009

932211
02-03-10

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

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

OMB No. 1545-0047

2009
Open to Public
Inspection

Name of the organization

SHAKER SCHOOLS FOUNDATION

Employer identification number

34-1351470

THE PUBLIC UPON REQUEST AND IN CERTAIN CASES AVAILABLE ON THE INTERNET AT
WWW.SHAKER.ORG.

FORM 990 PART XI, LINE 2C

PROCESS FOR OVERSEEING THE AUDIT AND SELECTING OF AN INDEPENDENT ACCOUNTANT
THE PROCESS FOR OVERSEEING THE AUDIT AND THE SELECTION OF THE
INDEPENDENT ACCOUNTANT HAS NOT CHANGED FROM THE PRIOR YEAR

Shaker Schools Foundation
 Form 990, Part IX, Line 1(b) Grants and Awards
 6/30/10
 FIN.34-1351470

TOTAL SCHOLARSHIPS, GRANTS and AWARDS

PURPOSE	AMOUNT	FUND
Excellence in Backstage Theatre	250	Nikki Babbit
Excellence in Citizenship	1,000	Andrew Barnett
Excellence in Athletics	300	David Berger
Excellence in Academics and Athletics	300	Daniel R Biello
Senior Scholarship in Education/Teaching	500	Laura Almeada Brooks
Outstanding Female Athlete	300	Lucille M Burkett
Outstanding Scholar	400	Rashad Burnley Memorial
Outstanding African American	500	CommitMEN
Excellence in Writing	400	Mae Stuart Dalrymple
Excellence in Goal Setting	500	M Evelyn Dilley
Middle School Scholarship	75	Katie Galvin
Senior Scholarship	700	Carolyn Garvin
Excellence in Language	300	Jenny Goldman Language Excellence
Scholarship and Athletics	1,132	Grace B Graham
Performing Arts & Humanities	150	June Marie Harney
Outstanding in Athletics	100	Fred Heinlen
Outstanding Perform in Instrumental Music	300	Douglas E Hicks
Senior Scholar/Athlete	250	John S Holdstein Memorial
Excellence in Science	500	Marcia Hubbard-Shepard
Excellence in Goal Setting	2,000	Dare to Dream
Excellence in Vocational School	1,000	Eric & Susan Lindquist Memorial
Environmental Concerns & Achievement	3,000	Jennifer Lynn Moore
Outstanding African American	900	MAC Scholar
Excellence in Leadership	250	Terry Pollack
Senior Community Leadership	1,000	Loretta Quade
Excellence in Modern Language	500	Rosewater Family Modern Language
High Academic Performance	350	A Jack Rumbaugh
Excellence in Journalism	250	Shaker Life
Excellence in Fine Arts	200	Amy Margolis Silberman
Excellence in Journalism & Public Service	100	Sue Silverman
Outstanding African American	1,500	Traci Louise Prince Williams
Excellence in Journalism	350	Jane Wood
Outstanding Accomplishments in Drama	800	Jeff Young
	20,157	

Shaker Schools Foundation
 Form 990, Part IX, Line 1(b) Grants and Awards
 6/30/10
 FIN 34-1351470

**AUTHORIZED PROJECTS & EDUCATIONAL
 ENRICHMENT GRANTS**

	AMOUNT	FUND
Enrichment Supplies, Materials, Teacher Grants	3,321	Affelder
Enrichment Supplies, Materials, Teacher Grants	615	Arts
Enrichment Supplies, Materials, Teacher Grants	4,643	Baseball
Enrichment Supplies, Materials, Teacher Grants	1,061	Brattin
Enrichment Supplies, Materials, Teacher Grants	438	Breland
Enrichment Supplies, Materials, Teacher Grants	207	Buie
Enrichment Supplies, Materials, Teacher Grants	407	Chang
Enrichment Supplies, Materials, Teacher Grants	2,618	CL 1938
Enrichment Supplies, Materials, Teacher Grants	185	CL 1949
Enrichment Supplies, Materials, Teacher Grants	197	CL 1954
Enrichment Supplies, Materials, Teacher Grants	373	CL 1973
Enrichment Supplies, Materials, Teacher Grants	177	CL 2001
Enrichment Supplies, Materials, Teacher Grants	8,833	Clarren
Enrichment Supplies, Materials, Teacher Grants	195	Croom
Enrichment Supplies, Materials, Teacher Grants	237	David
Enrichment Supplies, Materials, Teacher Grants	172	Epps
Enrichment Supplies, Materials, Teacher Grants	438	Geismer
Enrichment Supplies, Materials, Teacher Grants	502	Goodman
Enrichment Supplies, Materials, Teacher Grants	369	Herron
Enrichment Supplies, Materials, Teacher Grants	564	Hershman
Enrichment Supplies, Materials, Teacher Grants	416	Hirsch
Enrichment Supplies, Materials, Teacher Grants	400	Hutton
Enrichment Supplies, Materials, Teacher Grants	500	Kassen
Enrichment Supplies, Materials, Teacher Grants	530	Loeffler
Enrichment Supplies, Materials, Teacher Grants	974	MAC
Enrichment Supplies, Materials, Teacher Grants	997	MacIntyre
Enrichment Supplies, Materials, Teacher Grants	2,153	Marks
Enrichment Supplies, Materials, Teacher Grants	2,295	Mason
Enrichment Supplies, Materials, Teacher Grants	2,756	Morris
Enrichment Supplies, Materials, Teacher Grants	289	Pruett
Enrichment Supplies, Materials, Teacher Grants	5,860	Fernway
Enrichment Supplies, Materials, Teacher Grants	286	Lisak
Enrichment Supplies, Materials, Teacher Grants	4,673	High School
Enrichment Supplies, Materials, Teacher Grants	4,000	Mercer
Enrichment Supplies, Materials, Teacher Grants	500	Rosewater
Enrichment Supplies, Materials, Teacher Grants	245	Library
Enrichment Supplies, Materials, Teacher Grants	500	Kassen
Enrichment Supplies, Materials, Teacher Grants	202	Stein
Enrichment Supplies, Materials, Teacher Grants	1,248	Sugarman
Enrichment Supplies, Materials, Teacher Grants	5,695	Superintendent
Enrichment Supplies, Materials, Teacher Grants	2,452	Waller
Enrichment Supplies, Materials, Teacher Grants	766	Ware
Enrichment Supplies, Materials, Teacher Grants	325	Wonson
Enrichment Supplies, Materials, Teacher Grants	1,000	Onaway
Enrichment Supplies, Materials, Teacher Grants	2,050	Woodbury
Technology/Fine & Performing Arts Support for all Shaker Heights Schools	86,613	Red & White
Technology/Fine & Performing Arts	171,182	Capital Campaign
	<u>324,459</u>	

EXHIBIT A PAGE 2 OF 3

Shaker Schools Foundation
Form 990, Part IX, Line 1(b) Grants and Awards
6/30/10
FIN.34-1351470

PLAQUES AND AWARDS EXPENSES:

66 Biello
11 Burnley
10 Heinlen
10 Hicks
66 Moore
132 Young

295

Total Program Services

344,911

EXHIBIT A PAGE 3 OF 3

SHAKER SCHOOLS FOUNDATION

**15600 Parkland Drive
Shaker Heights, Ohio 44120**

FUND DESCRIPTIONS

(As of June 30, 2010)

The Shaker Schools Foundation depends upon the generosity of donors to fulfill its mission of providing resources to enrich the educational experiences of students of the Shaker Heights City School District. The Foundation is especially pleased to honor or memorialize a person, family, or alumni class. This can be accomplished with a donation of \$5,000 or more to set up a named fund. A special purpose endowment fund can be created with a gift of \$25,000 or more.

The Foundation's original named funds were established during its first year of existence. Income from these funds helps support teaching and learning in the Shaker Heights City Schools; now nearly 80 such funds exist. Many of the fund descriptions below contain a brief historical account. Most have ongoing activity in the form of additional donations by the fund sponsor or other contributors.

THE RUTH S. AFFELDER READING FUND – 085

The Ruth S. Affelder Reading Fund was established as an endowment fund in 1991 in tribute to Ruth S. Affelder's 70th birthday and to her years of service to the Shaker Schools and commitment to children's reading development. This fund may be used to improve the teaching of reading and language arts in the elementary grades and for staff development or the acquisition of materials, or for other purposes as deemed by the Foundation trustees.

NIKKI BABBIT MEMORIAL FUND – 620

The Nikki Babbit Memorial Fund was established as a special purpose endowment fund in 2008 in memory of Nikki Babbit. The mother of three graduates of the Theatre Arts Department (Ross, 1986; Jamie, 1989; and Rider, 1992), Nikki was a devoted follower and supporter of the Theatre Arts Department until her death in 2006. This fund will provide an award to a senior student who has provided outstanding technical service to the Shaker Heights High School Theatre Arts Department. This includes set, costume, light, or sound design, set construction, light board operation, and other activities that support performances.

DAVID M. BERGER MEMORIAL FUND – 140

The David M. Berger Memorial Fund was established as an endowment fund in 1984 in memory of David Berger, a former student of the Shaker Heights public schools, who was slain while participating in the 1972 Munich Olympic Games. The initial contributions were received from his parents, Dr. and Mrs. Benjamin Berger. The fund may be used to provide an annual academic/athletic award presented on Senior Honors Day at Shaker Heights High School or other purposes as deemed by the Foundation trustees.

DANIEL R. BIELLO MEMORIAL FUND – 150

The Daniel R. Biello Memorial Fund was established as an endowment fund in 1986 with contributions from friends in memory of Daniel R. Biello, a 1965 graduate of Shaker Heights High School and a distinguished radiologist and expert in nuclear medicine. The fund may be used for an award on Senior Honors Day to an outstanding student-athlete or other purposes as deemed by the Foundation trustees.

JEAN BRATTIN PHYSICS FUND – 115

The Jean Brattin Physics Fund was established as an endowment fund in 1989 in memory of Jean Brattin, who taught physics for eighteen years at Shaker Heights High School. This fund may be

EXHIBIT B PAGE 1 OF 14

used for the improvement of physics instruction through the purchase of equipment, funding of special science projects, and recognition of innovative science teaching. It may also be used to award outstanding students in the sciences, particularly in physics, or for other purposes as deemed by the Foundation trustees.

DAVID BRELAND FUND FOR INNOVATION IN MUSIC AND TECHNOLOGY – 517

The David Breland Fund for Innovation in Music and Technology was established in 2005 as a special purpose endowment fund in memory of David, a high school senior, who had a passion for integrating music and technology. His musical compositions reflected his creative and innovative nature. This fund will support an enrichment grant.

LAURA ALMEADA BROOKS MEMORIAL FUND – 018

The Laura Almeida Brooks Memorial Fund was established as an endowment fund in 2002 in memory of Laura Almeida Brooks, a lifetime educator and teacher of 35 years. This fund may be used for a student award to be given to a senior who has demonstrated a passionate concern for teaching and education and has achieved a 3.0 or higher grade point average, preferably bound for an Ohio or Tennessee college/university, or for other purposes as deemed by the Foundation trustees.

BUIE DATA PROCESSING FUND – 145

The Buie Data Processing Fund was established as an endowment fund in December 1989 with an individual contribution of \$2,000 by Mr. Richard Buie. The fund may be used for the support of innovative teaching in data processing and computer science and projects involving technology as it is applied to education or for other purposes as deemed by the Foundation trustees.

LUCILLE M. BURKETT FUND – 060

The Lucille M. Burkett Fund was established as an endowment fund in 1986 in tribute to Lucille M. Burkett's thirty-three years of service as a Shaker Heights School District teacher and administrator who retired in 1986. Revenues were raised from a special event in her honor. This fund may be used to support innovative teaching in physical education and to provide an award to an outstanding female athlete who has contributed time and participation in many school and community activities and has worked and achieved her academic potential, or for other purposes as deemed by the Foundation trustees.

RASHAD BURNLEY MEMORIAL FUND – 178

The Rashad Burnley Memorial Fund was established as an endowment fund in 2000 to honor an outstanding minority achievement scholar, enhance opportunities for the Minority Achievement Committee (MAC) Scholars, or for other purposes as deemed by the Foundation trustees.

PENNY CHANG FUND – 171

The Penny Chang Fund was established as an endowment fund in 2000 to support various enrichment projects that benefit the students in the Shaker Heights City Schools as deemed by the Foundation trustees.

CLASS OF 1938 SPECIAL SCHOLARSHIP FUND – 075

The Class of 1938 Harry Horvitz and C. C. Tippit Award Fund was established as an unrestricted endowment fund in 1990 in tribute to the Class of 1938 alumni. The fund was created by alums Harry Horvitz and C. Carlisle Tippit and may be used for providing current students and faculty

EXHIBIT B PAGE 2 OF 14

with opportunities for advanced study or for other purposes as deemed by the Foundation trustees.

CLASS OF 1949, including the Class of January 1950 Fund – 074

The Class of 1949, including the Class of January 1950 Fund was established as an unrestricted endowment fund in 2000 in tribute to the alumni of both classes. This fund may be used to provide opportunities for advanced study by students and/or to enhance instruction at Shaker Heights High School or for other purposes as deemed by the Foundation trustees.

CLASS OF 1954 ALUMNI FUND – 437

The Class of 1954 Alumni Fund was established as an unrestricted endowment fund in 2004 from contributions honoring the fiftieth reunion of the Class of 1954. The proceeds of this fund will be used to enrich the educational experience of the students of Shaker Heights High School.

CLASS OF 1973 FUND – 073

The Class of 1973 Fund was established as an unrestricted endowment fund in 1994 in tribute to the Class of 1973 by the twentieth-year reunion committee, with proceeds from the event and additional contributions from the members of the class. This fund may be used to enhance learning and teaching at Shaker Heights High School or for other purposes as deemed by the Foundation trustees.

SHAKER HEIGHTS HIGH SCHOOL CLASS OF 2001 FUND – 016

The Shaker Heights High School Class of 2001 Fund was established as an unrestricted expendable fund in 2001 in tribute to the Class of 2001 by the Shaker Heights High School After Prom Committee. This fund may be used for any purpose as deemed by the Foundation trustees.

“COMMITMEN” FUND – 630

The “CommitMEN” Fund was established in 2006 as an expendable fund by six Shaker natives: Justin Erkins (Shaker 1998), Patrick Hicks (Shaker 2000), Landon Lockhart (Shaker 1999), Trenton Marsh (Shaker 1998), Brad Picot (Shaker 1998) and Philip Smith (St. Ignatius 1999). This Fund will provide a \$500 award each year to an African-American male senior who earns at least a 2.5 GPA, has been accepted into a post-secondary program, and is a well-rounded person who demonstrates integrity, leadership, and service to others.

JAMEALA A. CROOM CAMP HOPE FUND – 660

The Croom Camp Hope Fund was established in 2007 in memory of Jameala, a fifth grade Woodbury student who believed in humanitarian efforts and in giving service to others. The fund will provide annual scholarships for sixth grade Shaker students to attend summer camp. Beginning Spring 2008, funds will be available for students who have financial or health impairments to attend the Sixth Grade Camp.

THE MAE STUART DALRYMPLE MEMORIAL FUND – 022

The Mae Stuart Dalrymple Memorial Fund was established as an endowment fund in 1995 in memory of Mae Stuart Dalrymple by Byron W. and Ellen F. Dalrymple. Mrs. Dalrymple, who grew up in Shaker Heights, lost her life in a tragic automobile accident in 1933. This fund may be used for activities that support student writing such as the publication of student newspapers and literary magazines or a student award for writing or other purposes as deemed by the Foundation trustees.

EXHIBIT B PAGE 3 OF 14

FRED DAVID MEMORIAL FUND – 053

The Fred David Memorial Fund was established as an endowment fund in 1997 in memory of Fred David, a longtime educator in the Shaker Heights City Schools, by his friends and colleagues. He served as a teacher, Treasurer, and Assistant Superintendent, totaling nearly thirty years of service. This fund may be used for purposes as deemed by the Foundation trustees.

M. EVELYN DILLEY FUND – 021

The M. Evelyn Dilley Fund was established as a special purpose endowment fund in 2007 as part of a bequest from Kenneth J. Suid. Mr. Suid, a 1958 Shaker Heights High School graduate, received encouragement, support, and inspiration from Miss Dilley. She taught him the concept of “making your best better,” and Mr. Suid lived by and shared this motto throughout his life. This fund will provide an award to a graduating student who exemplifies the personal goals and ideals expressed the motto, “make your best better,” and a commemorative medal will be given with the cash award.

RICHARD WILLIAM EPPS MEMORIAL FUND – 043The Richard William Epps Memorial Fund was established as an endowment fund in 1993 in memory of Richard W. Epps, an active member of the Shaker community, by his friends. This fund may be used for general purposes as deemed by the Foundation trustees.

FINE AND PERFORMING ARTS FUND – 050

The Fine and Performing Arts Fund was established as an endowment fund in 1985 from many contributors to enhance the dramatic, musical, and visual arts programs in the schools. This fund may be used for providing artists-in-residence, mentorships for students, visual aids, production costs, or for the acquisition of video and photography equipment for production and presentation, or for other purposes as deemed by the Foundation trustees.

LINDA FREEMAN FUND – 173

The Linda Freeman Fund was established as an unrestricted endowment fund in 1999 to support various enrichment projects that benefit the students in the Shaker Heights City Schools as deemed by the Foundation trustees.

KATIE GALVIN FUND – 040

The Katie Galvin Fund was established as an endowment fund in 1985 in memory of Katie Galvin, a former Middle School student who passed away. This fund may be used to honor an eighth grader for excellence in the arts or for other purposes as deemed by the Foundation trustees.

CAROLYN GARVIN SCHOLARSHIP FUND – 149

The Carolyn Garvin Scholarship Fund was established as an endowment fund in 2001 by family and friends to honor Carolyn as the recipient of the Martin Luther King Human Relations Award. The fund may be used to provide an award to a senior who demonstrates leadership abilities and a grade point average of at least 2.5, or for other purposes as deemed by the Foundation trustees.

BARBARA P. GEISMER FUND FOR CULTURAL ENRICHMENT IN GRADES K-3 – 502

The Barbara P. Geismer Fund for Cultural Enrichment in Grades K-3 was established in July 2005 as a special purpose endowment fund by Meg Ostrum, Alan Geismer, and Mollie Geismer in honor of the birthday of their mother, Barbara Geismer. The proceeds from the fund will be used to support a teacher grant that focuses on cultural enrichment in the primary grades.

EXHIBIT B PAGE 4 OF 14

JENNY GOLDMAN LANGUAGE EXCELLENCE FUND – 636

The Jenny Goldman Language Excellence Fund was established as a special purpose endowment fund in 2006 in memory of Jenny Goldman, Class of 2005, who loved languages and cultures. A junior at the time of her death, she was already fluent in French and Japanese and was studying German and Russian. She helped with student exchange programs and made each participant feel welcome. The Jenny Goldman Language Excellence Award is presented in her memory. It is awarded to a junior or senior who has excelled in more than one language and who has also demonstrated a love of learning languages by efforts beyond the classroom or academic requirements.

ROBERT C. GOODMAN SCIENCE FACULTY ENRICHMENT FUND – 035

Formerly known as the Robert C. Goodman Memorial Fund, the Robert C. Goodman Science Faculty Enrichment Fund was established as an endowment fund in 1993 in memory of Robert C. Goodman by his family. Bob, a 1945 graduate of Shaker Heights High School, taught physics and chemistry in the High School science department for thirty years. This fund may be used for equipment, supplies, and activities that advance the instruction of chemistry and physics, or for other purposes as deemed by the Foundation trustees.

THE GRACE B. GRAHAM LEARNING FUND – 170

The Grace B. Graham Learning Fund was established as an endowment fund in 1998 by David M. Gleason, a 1950 Shaker Heights High School graduate, Shaker Heights High School Alumni Hall of Fame inductee, and a member of the All Time Shaker Football Team. The fund was established in memory of his teacher and mentor, Grace B. Graham, who was the chairperson of the English Department and taught at Shaker Heights High School from 1924-1960. The fund may be used to provide for two awards: an award to a student athlete who excels in academics and/or extra-curricular activities due to the strong mentoring of a teacher, and an award to the teacher whose constant encouragement taught the student receiving the award to excel, or for other purposes as deemed by the Foundation trustees.

THE GRANDPARENTS FUND – 165

The Grandparents' Fund was established as an unrestricted endowment fund in 1996 to encourage grandparents to honor their grandchildren and conversely, for grandchildren to honor their grandparents. The fund may be used for purposes as deemed by the Foundation trustees.

PAT GUSE EARLY CHILDHOOD FUND – 172

The Pat Guse Early Childhood Fund was established in 2000 to support early childhood enrichment opportunities or for other purposes as deemed by the Foundation trustees.

JOHN HARBOURT MEMORIAL FUND – 888-JH

The John Harbourt Memorial Fund was established by Grant K. Goodman in 2009 as a named endowment fund in memory of John Harbourt, who was a member of the Shaker Heights High School social studies faculty from 1928 until his retirement in 1965. Dr. Goodman is a 1942 Shaker graduate and was so inspired by Mr. Harbourt that he became a history professor at the University of Kansas. This fund will support the teaching of academics, with a focus on history.

JUNE MARIE HARNEY FUND FOR THE PERFORMING ARTS – 095

The June Marie Harney Award for the Performing Arts was established as an endowment fund in 1991 in memory of June Marie Harney, a 1941 graduate of Shaker Heights High School, who excelled in the dramatic arts. This fund may be used for an award to a student who excels in the

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performing arts and humanities. It also can support that curriculum by providing books, music, equipment, supplies, and other needed expenditures in the performing arts and humanities, or for other purposes as deemed by the Foundation trustees.

FRED HEINLEN FUND – 642

The Fred Heinlen Fund was established as an expendable fund in 2006 to honor Fred Heinlen, who served as Shaker Heights High School's physical education teacher and baseball coach from 1946 to 1980 and was athletic director for 25 years. He won 466 games, 8 Lake Erie League championships, state championships in 1965 and 1976, and was inducted into the Ohio High School Coaches Hall of Fame. An annual, honorary award will be given to a junior or senior Varsity baseball player who demonstrates the values Fred instilled in his teams: respect, hard work, leadership, and integrity. The fund also supports scoreboard and baseball field maintenance.

SARITA HERRON FUND – 615The Sarita Herron Fund was established in 2009 from gifts in memory of Sarita, who was a student at Lomond Elementary School at the time of her death. The Sarita Herron Fund is an expendable fund that will support and enrich art projects at Lomond.

THE ROB HERSHMAN FUND – 433

The Rob Hershman Fund was established in 2004 as a special purpose endowment fund in memory of Rob Hershman, a 1971 graduate of Shaker Heights High School, whose broadcasting and journalism career earned him many prestigious awards and recognitions. This fund honors his deep intellect, activism, and strength of character. The proceeds will be used to support projects/activities for students in literature, history, or foreign language classes that use broadcasting and/or journalism to bring about societal change.

DOUGLAS E. HICKS MEMORIAL FUND – 130

The Douglas E. Hicks Memorial Fund was established as an endowment fund in 1983 in memory of Douglas E. Hicks, a former student of Shaker Heights City School District, who died shortly after graduation. The initial contribution of \$2,000 was received from Ms. Anna Apley. The fund may be used for annual awards to be presented on Senior Honors Day at Shaker Heights High School in the area of instrumental music or for other purposes as deemed by the Foundation trustees.

HIRSCH FAMILY FUND – 142The Hirsch Family Fund was established as an unrestricted endowment fund in 2000, by Carl Hirsch, a 1964 graduate of Shaker Heights High School. The fund may be used for purposes as deemed by the Foundation trustees.

JOHN S. HOLDSTEIN MEMORIAL FUND – 096

The John S. Holdstein Memorial Fund was established as an endowment fund in 2001 in memory of John Holdstein, a 1971 graduate of Shaker Heights High School. This fund may be used for an award to an outstanding senior scholar athlete, or for other purposes as deemed by the Foundation trustees.

DOROTHY HUMEL HOVORKA AWARD FOR SCHOLASTIC ACHIEVEMENT – 080

The Dorothy Humel Hovorka Award for Scholastic Achievement was established as an endowment fund in November of 1990 by Dorothy Humel Hovorka, a 1938 graduate of Shaker Heights High School. This fund may be used for an annual recognition award to either the highest achieving African American male or female of the junior class of Shaker Heights High

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School as determined by cumulative grade point average in the spring of the junior year. The fund also provides a cash award to that student in the senior year, or supports other purposes as deemed by the Foundation trustees.

BRIAN HUTTON MEMORIAL FUND – 045

The Brian Hutton Fund was established as an endowment fund in 1990 in memory of Brian Hutton, a junior at Shaker Heights High School, by numerous individuals. This fund may be used for financial assistance to deserving high school band participants to purchase/rent band uniforms, instruments, or travel expenses, or for other purposes as deemed by the Foundation trustees.

KASSEN BOULEVARD BOOK FUND – 047

The Kassen Boulevard Book Fund was established as an endowment fund in 1999 in tribute to Aileen and Julian Kassen. This fund may be used for purchasing books for the Boulevard School Library, or for other purposes as deemed by the Foundation trustees.

JUDY WILKOFF KAUFMAN FUND – 019

The Judy Wilkoff Kaufman Fund was established as a special purpose endowment in 2007, in memory of Judy Kaufman. Judy was a 1955 Shaker graduate and organized many of her class reunions. Four of her classmates – Art Brooks, Mary Jo Chiara, Ab Glickman, and Edie Fellingner Hirsch – solicited the Class of 1955 in order to create this fund, which will support women's athletics at the High School.

LIBRARY FUND – 030

The Library Fund was established as an endowment fund in 1982 with a \$5,000 award to the Shaker Heights School District Library Media Centers from the American School Libraries Association and the Encyclopedia Britannica Foundation. This fund may be used for Library Media activities within the Shaker Heights City School District or for other purposes as deemed by the Foundation trustees.

THE ERIC AND SUSAN LINDQUIST MEMORIAL FUND – 573

The Eric and Susan Lindquist Memorial Fund was established with an anonymous gift in 2007 as a special purpose expendable fund. It will provide annual scholarships to up to four students (considering a mix of both genders) in the senior class who either have been enrolled in Shaker's Career Prep Program and/or have been accepted into a post high school trade, apprentice, or vocational school, or a two-year arts school. In addition, the candidates will exhibit the characteristics of both Eric and Susan Lindquist in their desire to give back to the Shaker Schools and community. This fund honors the lives and work of siblings Eric and Susan Lindquist, both members of the Class of 1973. The first awards were given in 2008.

THE LAWRENCE LISAK MEMORIAL FUND – 648

The Lawrence Lisak Memorial Fund was established as a special purpose endowment fund in 2006 to honor Mr. Lisak, who was a teacher in the Shaker Heights City Schools from 1956 to 1999. He taught social studies and history at Woodbury Junior High (1956 to 1987) and Shaker Heights High School (1987 to 1999), where he also supported the library through the donation of many books. The Lawrence Lisak Memorial Fund will provide support to the Shaker Heights High School Library for activities, projects, and the purchase of resources and equipment.

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LINDA LOEFFLER SCIENCE FUND – 525

The Linda Loeffler Science Fund was established as an expendable fund in 2005 in memory of Linda Loeffler. Her passion for science was lifelong, although she began her professional career as a commercial artist. Linda taught science in the Shaker Heights City Schools for nearly 20 years and was particularly interested in encouraging girls to pursue science. This fund may be used to support innovative teaching and learning in the sciences, such as biology, chemistry, engineering, and other related sciences.

WILLIAM JAMES AND KATHLEEN SUZANNE MACINTYRE FUND – 671

The William James and Kathleen Suzanne MacIntyre Fund was established at Kate MacIntyre's request as a special purpose endowment fund in 2008 in honor of her father, Dr. William James MacIntyre, and to support her interest in promoting writing and journalism. Dr. MacIntyre is an emeritus professor of nuclear physics at Case Western Reserve University. A 1970 Shaker alum, Kathleen earned graduate degrees in public administration and journalism and pursued her love of writing and the arts and her advocacy of women until her death in 2007. This fund will provide biennial support for projects related to High School physics and other investigatory science classes, including the new engineering applications course. In alternate years, the fund will provide support for projects to enrich the creative writing and/or journalism courses at Shaker Heights High School. These can include the award-winning student newspaper (*The Shakerite*) or the journal for writers, artists, and poets (*The Semanteme*).

DR. LOUISE MARKS ACTIVE LEARNING FUND – 110

The Dr. Louise Marks Active Learning Fund was established as an endowment fund in 1982 in memory of Dr. Louise Marks, a former teacher in the Shaker Heights City School District, who taught children with learning disabilities. This fund may be used for providing in-services and staff development to improve teaching; enhancement of basic learning skills; acquisition of materials and supplies that improve the educational environment; programs to help parents improve their children's learning abilities; related activities; or for other purposes as deemed by the Foundation trustees.

THE MASON FAMILY FUND – 135

The Mason Family Fund was established as an unrestricted endowment fund in 1989 with contributions from family and friends in memory of Elisabeth Mason Hopkins, a graduate of Shaker Heights High School. The fund may be used for purposes as deemed by the Foundation trustees.

JENNIFER LYNN MOORE FUND – 065

The Jennifer Lynn Moore Fund was established as an endowment fund in 1992 in memory of Jennifer Lynn Moore, a 1990 graduate of Shaker Heights High School, with contributions from family and friends. This fund may be used for an annual award to a graduating senior who has demonstrated a passionate concern for the environment and is an exceptional student, for environmental education, or for other purposes as deemed by the Foundation trustees.

THE PETER MORGENSTERN-CLARREN GARDEN FUND – 435

The Peter Morgenstern-Clarren Garden Fund was established in 2004 as a special purpose endowment in memory of Peter Morgenstern-Clarren, a 1999 Shaker School graduate. The fund honors Peter's passion for the environment and for the education of our youth. The proceeds will be used for the maintenance of the garden at Onaway School.

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BOB MORRIS FUND – 020

The Bob Morris Fund was established as an unrestricted endowment fund in 1982 in tribute to Robert J. Morris, former deputy superintendent of the Shaker Heights City School District, who retired in 1982. This fund may be used for purposes as deemed by the Foundation trustees.

MUSIC ENRICHMENT FUND – 618, SP

The Music Enrichment Fund is a special purpose endowment established in 2006 with an anonymous donation in honor of the Shaker Heights High School band program. The initial gift was matched by additional contributions to provide funding for the enrichment of the instrumental program. This includes, but is not limited to, group instrument lessons for disadvantaged middle and high school students who would not otherwise be able to afford instruction, work with guest conductors, clinics with composers, and master classes with professional musicians.

TERRY POLLACK FUND FOR LEADERSHIP AND DIVERSITY – 432

The Terry Pollack Fund for Leadership and Diversity was established in 2004 in honor of Terry's sixty-fifth birthday. It is a special purpose endowment fund and will support an annual senior award to a student who demonstrates an understanding of the social studies and who attempts to make a positive difference in the lives of others. The award recipient will possess the leadership, initiative, and chutzpah necessary to make a real and significant impact on human relations.

THE LISA PRUETT FUND – 055

The Lisa Pruett Fund was established as an endowment fund in 1997 in memory of Lisa Pruett, a member of the junior class at Shaker Heights High School. This fund may be used for (1) an award to recognize a junior student who excels in creative writing or the study of foreign languages; (2) support of the publication of the literary magazine, visiting artists, and other enrichment activities as deemed by the Foundation trustees.

LORETTA QUADE COMMUNITY LEADERSHIP MEMORIAL FUND – 017

The Loretta Quade Community Leadership Memorial Fund was established as an endowment fund in 2001 in memory of Loretta Quade, a Shaker Schools parent and an active community supporter. This fund may be used for an annual award to a Shaker Heights High School senior who has demonstrated sustained and meaningful commitment and leadership to enhance and improve the Shaker Heights community, who has achieved academic success, and who is planning to attend a college or university following high school graduation.

RED & WHITE

The Benefit Fund for *A Night for the Red & White* was established as an expendable fund in 1991 with contributions from many individuals. This fund may be used to cover costs incurred for conducting fundraising events, which celebrate learning and teaching in the Shaker schools, or for other purposes as deemed by the Foundation trustees.

FRANK RICHARDS MEMORIAL FUND – 025

The Frank Richards Memorial Fund was established as an endowment fund in 1992 in memory of Frank G. Richards, Jr. This fund may be used for purposes as deemed by the Foundation trustees.

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ROSEWATER FAMILY FUND – 670 The Rosewater Family Fund was established in 2007 by Gail Rosewater, a Shaker graduate who taught French and Spanish for more than twenty years and tutored at Shaker Heights High School before her retirement. This special purpose endowment fund will provide an annual award to a senior who has completed at least four years of the same **modern** language at the high school level and has demonstrated diligence, dedication, and enthusiasm in the study of this language. This award will not be given to native speakers of modern languages, unless they have taken four years of a different modern language. The first award was given in 2008.

A. JACK RUMBAUGH FUND – 174

The A. Jack Rumbaugh Fund was established as an endowment fund in 1999 in memory of Jack Rumbaugh, principal of Shaker Heights High School from 1987-1999. This fund provides for an award for a senior who will be attending Kent State University and who has a maximum grade point average of 3.5 or for other purposes as deemed by the Foundation trustees.

SCHOOL FUNDS

THE BOULEVARD SCHOOL FUND – 002

This fund was created in 1990 with several individual contributions. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

THE FERNWAY SCHOOL FUND – 003

This fund was created in 1990 with several individual contributions. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

THE LOMOND SCHOOL FUND – 004

This fund was created in 1990 with several individual contributions. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

THE MERCER SCHOOL FUND – 005

This fund was created in 1990 with several individual contributions. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

THE ONAWAY SCHOOL FUND – 006

This fund was created in 1990 with several individual contributions and a \$2,000.00 gift from Marjorie Klimek Newman on behalf of her mother, Irene Sacks Schulman. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

ONAWAY THEATER FUND – 654

This fund is an expendable fund established in 2007 for the purpose of funding a yearly student theatrical production at Onaway Elementary School.

THE WOODBURY SCHOOL FUND – 007

This fund was created in 1990 with several individual contributions and a \$1,000.00 gift from Marjorie Klimek Newman on behalf of her mother, Irene Sacks Schulman. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

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WOODBURY SCIENCE CLUB – 008

THE MIDDLE SCHOOL FUND – 015

This fund was established in 1987 with an anonymous gift from a grateful family in honor of the Shaker Heights Middle School. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

THE HIGH SCHOOL FUND – 012

This fund was created in 1990 with several individual contributions. The assets of the fund may be used for a variety of purposes by the faculty with the approval of the building's principal and executive director of the Foundation.

SGORR FUND – 667The SGORR Fund was established in 2008 as a special purpose endowment, in honor of the 25th anniversary of the Student Group on Race Relations and its founder Marcia Jaffe. This fund will support the activities of SGORR, especially team building and leadership development opportunities. These can include, but are not limited to, retreats for the entire group at the beginning of each school year, workshops for leadership development, and guest speakers.

SHAKER FIELDS DEVELOPMENT FUND – 675The Shaker Fields Development Fund was established in 2008 as a special purpose expendable fund to bring state-of-the-art, all-weather playing fields to Shaker Heights.

SHAKER LIFE AWARD FOR EXCELLENCE IN JOURNALISM FUND – 606

The Shaker Life Award for Excellence in Journalism was established in 2005 as an expendable fund. This fund provides a junior student who excels in journalism with a cash award and an opportunity during senior year to have an original article published in *Shaker Life Magazine*.

SHAKER SPORTS BOOSTER CLUB FUND – 125

The Shaker Sports Booster Club Fund was established in 1989 through a donation of \$3,000 from the Shaker Sports Booster Club. The fund provides worthy students from the Shaker Heights School District with tuition to summer sports camps or for other purposes as deemed by the Foundation trustees.

KAREN SHER FUND – 669

The Karen Sher Fund was established in 2007 to honor Onaway Elementary School Kindergarten teacher Karen Sher, who retired from teaching after 26 years. This tribute was conceived and funded by grateful parents of many of the students Mrs. Sher taught during her career. This special purpose fund will be used to purchase books for all reading levels and to support literacy projects, as determined or selected by the Onaway librarians.

AMY MARGOLIS SILBERMAN FUND FOR EXCELLENCE IN THEATER ARTS – 160

The Amy Margolis Silberman Fund for excellence in Theater Arts was established as an endowment fund in 1995 in memory of Amy Margolis Silberman, a 1981 graduate of Shaker Heights High School, with contributions from numerous individuals. This fund provides for an award to be presented to a member of the junior class who demonstrates excellence in the arts or for other purposes as deemed by the Foundation trustees.

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SUE SILVERMAN MEMORIAL FUND – 090

The Sue Silverman Memorial Fund was established as an endowment fund in 1991 in memory of Sue F. Silverman, a 1957 graduate of Shaker Heights High School, by family and friends. This fund may be used for an annual award to a female student in the junior class who demonstrates excellence in the areas of leadership and communication, or for other purposes as deemed by the Foundation trustees.

ALICE STEIN READING FUND – 672

The Alice Stein Fund was established as a special purpose endowment fund in 2008 in memory of Alice Stein. She was an employee of the Shaker Heights City Schools for 31 years and a reading skills improvement specialist at Fernway Elementary School for 27 years. This fund will support reading enrichment activities at Fernway.

ELENA STEINBERG FUND – 612The Elena Steinberg Fund was established as a special purpose endowment fund in 2006 in memory of Elena Steinberg, a first grade student at Boulevard Elementary School. This fund will support educational enrichment and creativity. The purpose is to enable teachers to experiment outside of the standard curriculum and to provide for materials needed to support creative activities.

STOUT FAMILY FUND FOR ADVANCED TECHNOLOGY – 438The Stout Family Fund for Advanced Technology was established in November 2004 as a special purpose endowment fund. The purpose of the fund is to promote the teaching of computer science and technology, information systems, and electronic research and communication to the broadest possible range of Shaker students.

JOAN AND NORMAN SUGARMAN FAMILY FUND – 052

The Joan and Norman Sugarman Family Fund was established as an endowment fund in 1992 in memory of Norman A. Sugarman, an active member of the Shaker community. This fund may be used for the following purposes: to establish a collection of books and media suitable for the students and faculty of the Shaker Schools which have been written or conceived by Shaker graduates; to encourage multi-age and individualized programming; and to support unusual and creative programs that widen and expand multi-generational community and student efforts in the performing and visual arts, or for other purposes deemed by the Foundation trustees.

SUPERINTENDENT'S FUND – 010The Superintendent's Fund was established in 1982 as an unrestricted endowment fund in honor of Jack P. Taylor, a former superintendent of the Shaker Heights City School District. In August 2004, the fund received a large donation from the Martha Holden Jennings Foundation in honor of the current superintendent, Mark Freeman, who was selected to receive the Jennings Ohio Superintendent Outstanding Performance Award. The fund's purpose was changed at this time to provide travel opportunities for disadvantaged students or to provide other opportunities at the discretion of the superintendent.

COACH TEKIELI FOOTBALL FUND – 014The Coach Tekieli Football Fund was established with an anonymous gift in 2007 as a special purpose expendable fund to enrich the football program at Shaker Heights High School. This fund will support the development of high school student-athletes as dedicated, self-disciplined, goal-oriented, competitive, and compassionate people. It will provide funding for tutors to prepare student-athletes to take the SAT and ACT; for the purchase of equipment and training camp gear; and for off-season awards and the Tekieli scholarship.

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PETER W., WILLIAM A. AND HAROLD J. THEISEN MEMORIAL FUND – 155

The Peter W., William A. and Harold J. Theisen Memorial Fund was established as an unrestricted endowment fund in December 1989 in memory of Peter W. and William A. Theisen, both graduates of Shaker Heights High School. The initial contribution to create the fund was in the amount of \$5,000 and was received from Dr. Harold J. Theisen, father of the decedents. The fund was modified by Pat Cornell (sister and daughter) in January 2001 to change the name to include Harold J., the father. The purpose was changed to reflect that the fund may be used to enhance the education of the special classes at Onaway School or for other purposes as deemed by the Foundation trustees.

ALYN E. WALLER FUND – 676

The Alyn E. Waller Fund was established by Dr. Waller in 2009 as a special purpose expendable fund. This fund creates the *Raider Men of Tomorrow* program at Shaker Heights High School and will support the development of student-athletes who understand and respect the educational process in life, academics, and athletics. The Waller Fund will help pay for tutors for the SAT and ACT and schoolwork; assistants to guide study groups; support for community service; scholarships for books and materials that enrich the educational process; and scholarships for sports camps. Alyn Waller was a football player and wrestler at Shaker, graduating in 1982.

RICK WARE FUND FOR CREATIVE EDUCATION AND TEACHING EXCELLENCE

– 070The Rick Ware Fund for Creative Education and Teaching Excellence was established as an unrestricted endowment fund in 1988 in memory of Richard Ware, a Shaker Heights School District teacher, who died in 1988. This fund may be used for purposes as deemed by the Foundation trustees.

TRACI LOUISE PRINCE WILLIAMS FUND – 501

The Traci Louise Prince Williams Fund was established in 2005 as an expendable fund in memory of Traci Williams, a 2001 Shaker graduate, who took the dare to live her dream during her twenty-one years. Active in co-curricular activities while a Shaker student, Traci’s compassion for others was demonstrated as a pre-med student at Denison University. The fund will provide awards for books in the amount of \$500 each to five African-American graduating seniors, who have a minimum grade point average of 2.5, and who demonstrate the legacy left by Traci.

BOB WONSON FUND – 625

The Bob Wonson Fund was established in 2009 from gifts in memory of Bob Wonson, who was a social studies teacher and head basketball coach at Shaker Heights High School at the time of his death. During his twenty-four years at Shaker, he led his teams to thirteen Lake Erie League championships, six district titles, and one regional title. The Wonson Fund is an expendable fund that will provide scholarships so that disadvantaged students can attend summer and pre-season basketball camps.

JANE WOOD AWARD FOR OUTSTANDING STUDENT JOURNALISM – 401

The Jane Wood Fund was established in March 2004 as an endowment in honor of the retirement of Jane Wood and her years of outstanding service and leadership as the editor of the *Shaker Magazine*. The fund provides an award to a senior student who excels in writing for the *Shakerite*.

JEFF YOUNG MEMORIAL FUND – 120

The Jeff Young Memorial Fund was established as an endowment fund in 1982 in memory of Jeffery Young, a former student of Shaker Schools, who died while attending college. This fund

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may be used for annual awards to graduates of Shaker Heights High School to assist in pursuing post-secondary education in the areas of music and drama, or for other purposes as deemed by the Foundation trustees.

Revised 11/30/04

6/4/03 – Hovorka change
7/7/03 -- Graham wording changes
3/23/04 – Wood established fund #401
11/30/04 – added funds 432, 433, 434, 435, 437, 438
1/5/05- wording on Harney, wording on Burnley, wording on Wood
1/13/05– added Pollack wording
2/17/05 – Wood wording
3/10/05 – Addition of Traci Louise Prince Williams Fund
5/13/05 – Wood wording
5/31/05 – Revised title on Jane Wood Award
10/12/05 – Added title & number of Linda Loeffler Science Fund
10/20/05 – Added Geismer description
10/25/05 – Revised Geismer description
11/17/05 – Added Breland description
1/25/06 – Wood wording
2/7/06 – Added Shaker Life Award description
2/9/06 – Added Loeffler description
2/14/06 – Corrected name on Mason Family Fund
3/23/06– Revised Shaker Life wording
5/30/06 – Added Goldman and CommitMEN descriptions
6/27/06 – Added Heinlen and Lisak descriptions
8/21/06 – Edited introduction and some descriptions, clarified fund types
9/26/06 – Changed name of Robert C Goodman Memorial Fund
3/7/07 – Corrected name of Terry Pollack's fund
4/5/07 – Added Onaway Theater Fund
4/24/07 – Added Jameala A Croom Camp Hope Fund
5/10/07 – Added placeholders for SGORR, Karen Sher Fund, Rosewater Family Fund
6/5/07 – Added Elena Steinberg Fund and descriptions for Terry Pollack Fund for Leadership and Diversity, Rosewater Family Fund, Karen Sher Fund
8/9/07 – Added placeholder for Coach Tekieli Football Fund
11/5/07 – Added descriptions for Coach Tekieli Football Fund and SGORR Fund, added M Evelyn Dilley Fund and Judy Wilkoff Kaufman Fund
11/7/07 – Clarified fund types for Guse, Shaker Sports Booster, Rosewater, and Sher
2/5/08 – Added Lindquist Memorial Fund
2/19/08 – Added Nikki Babbit Memorial Fund and placeholder for Shaker Fields Development Fund
3/31/08 – Added "Memorial" to the Rashad Burnley Fund, per Lawrence Burnley
4/9/08 – Changed wording on Shaker Life Fund
5/6/08 – Added Shaker Fields Development Fund
6/1/08 – Removed "unrestricted" from grandfathered endowment funds that actually are restricted
6/24/08 – Added MacIntyre Fund and placeholder for Alice Stein Fund
4-17-09 – Removed excepting Latin and Greek and bolded modern in Rosewater Fund
4-25-09 – Lindquist wording
4-28-09 – SGORR wording
5-26-09 – Alice Stein Fund description
9-29-09 – Changed introduction to comply with new Contribution Policy
11-5-09 – Added John Harbourt Memorial Fund
11-17-09 – Added Herron and Wonson funds
01-28-10 – Added Alyn E Waller Fund
04-20-10 – Took word Memorial off of Harney award name

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Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box **X**

• If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonprofits.

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization SHAKER SCHOOLS FOUNDATION		Employer identification number 34-1351470
	Number, street, and room or suite no. If a P.O. box, see instructions. 15600 PARKLAND DRIVE		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SHAKER HEIGHTS, OH 44120		

Check type of return to be filed (file a separate application for each return):

- | | | |
|--|---|------------------------------------|
| <input checked="" type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

SHAKER SCHOOLS FOUNDATION

• The books are in the care of ▶ **15600 PARKLAND DRIVE - SHAKER HEIGHTS, OH 44120**

Telephone No. ▶ **216-295-4329** FAX No. ▶

• If the organization does not have an office or place of business in the United States, check this box

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension will cover.

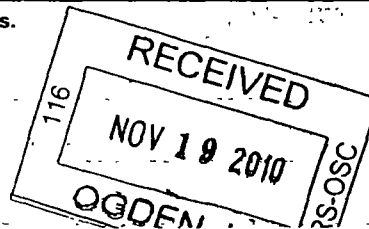
1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2011** , to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ calendar year _____ or
▶ tax year beginning **JUL 1, 2009** , and ending **JUN 30, 2010**

2 If this tax year is for less than 12 months, check reason: Initial return Final return Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$
c	Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ N/A

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

HA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.



- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box **X**
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print File by the extended due date for filing your return. See instructions.	Name of exempt organization SHAKER SCHOOLS FOUNDATION	Employer identification number 34-1351470
	Number, street, and room or suite no. If a P.O. box, see instructions. 15600 PARKLAND DRIVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SHAKER HEIGHTS, OH 44120	

Enter the Return code for the return that this application is for (file a separate application for each return) 01

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868

- The books are in the care of **SHAKER SCHOOLS FOUNDATION**
 Telephone No. **216-295-4329** FAX No. _____
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box . If it is for part of the group, check this box and attach a list with the names and EINs of all members the extension is for
- 4 I request an additional 3-month extension of time until **MAY 15, 2011**
- 5 For calendar year _____, or other tax year beginning **JUL 1, 2009**, and ending **JUN 30, 2010**
- 6 If the tax year entered in line 5 is for less than 12 months, check reason: Initial return Final return
 Change in accounting period
- 7 State in detail why you need the extension
THE TAXPAYER IS IN NEED OF ADDITIONAL TIME TO OBTAIN INFORMATION FROM A THIRD PARTY IN ORDER TO FILE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	0.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	0.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature *[Handwritten Signature]* Title **CPA** Date **2/14/11**