efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493059005113

Form **990**

Department of the Treasury
Internal Revenue Service

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)

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

OMB No 1545-0047

2011

Open to Public Inspection

A For the 2011 calendar year, or tax year beginning 07-01-2011 and ending 06-30-2012

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

C Name of organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Doing Business As

Number and street (or P O box if mail is not delivered to street address) | Room/suite
675 MASSACHUSETTS AVENUE 8TH FLOOR

City or town, state or country, and ZIP + 4
CAMBRIDGE, MA 02139

D Employer identification number
04-3457065

E Telephone number
(617)876-7700

G Gross receipts $ 3,024,485

F Name and address of principal officer
JOHN H JACKSON
675 MASSACHUSETTS AVENUE 8TH FLOOR
CAMBRIDGE,MA 02139

H(a) Is this a group return for affiliates? ☐ Yes ☑ No

H(b) **Are all affiliates included?** ☐ Yes ☐ No
If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW SCHOTTFOUNDATION ORG

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶ | L Year of formation 1999 | M State of legal domicile MA

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
THE PURPOSE OF THE CORPORATION IS TO ENGAGE IN THE FOLLOWING ACTIVITIES (1) TO OPERATE EXCLUSIVELY FOR CHARITABLE AND EDUCATIONAL PURPOSES UNDER CODE SECTION 501(C)(3), (2) TO DEVELOP AND STRENGTHEN A BROAD-BASED AND REPRESENTATIVE MOVEMENT TO ACHIEVE FULLY RESOURCED, QUALITY PRE K-12 PUBLIC EDUCATION, AND (3) TO ENGAGE IN ANY AND ALL OTHER LAWFUL ACTIVITIES INCIDENTAL TO AND IN PURSUIT OF THE FOREGOING PURPOSES, EXCEPT AS SPECIFICALLY RESTRICTED BY THE ARTICLES OF ORGANIZATION

2 Check this box ▶☐ 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	13
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	13
5	Total number of individuals employed in calendar year 2011 (Part V, line 2a)	5	19
6	Total number of volunteers (estimate if necessary)	6	14
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	35,000
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	13,558,997	2,794,345
	9	Program service revenue (Part VIII, line 2g)	0	0
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	23,950	93,101
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	46,135	88,585
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	13,629,082	2,976,031
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1,563,054	2,046,757
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	1,510,304	1,904,839
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶103,246		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	1,276,443	1,049,203
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	4,349,801	5,000,799
	19	Revenue less expenses Subtract line 18 from line 12	9,279,281	-2,024,768

Net Assets or Fund Balances			Beginning of Current Year	End of Year
	20	Total assets (Part X, line 16)	11,959,425	10,582,125
	21	Total liabilities (Part X, line 26)	661,170	1,003,481
	22	Net assets or fund balances Subtract line 21 from line 20	11,298,255	9,578,644

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

****** | 2013-02-21
Signature of officer | Date

JOHN H JACKSON PRESIDENT AND CEO
Type or print name and title

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ▶ ☐	Preparer's taxpayer identification number (see instructions)
JOSEPH M GISO	2013-02-21		P00030126

Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ CBIZ TOFIAS
500 BOYLSTON STREET
BOSTON, MA 02116

EIN ▶ 26-3753134

Phone no ▶ (617) 761-0600

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

Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response to any question in this Part III . . . . ☑

1 Briefly describe the organization's mission

THE PURPOSE OF THE CORPORATION IS TO ENGAGE IN THE FOLLOWING ACTIVITIES (1) TO OPERATE EXCLUSIVELY FOR CHARITABLE AND EDUCATIONAL PURPOSES UNDER CODE SECTION 501(C)(3), (2) TO DEVELOP AND STRENGTHEN A BROAD-BASED AND REPRESENTATIVE MOVEMENT TO ACHIEVE FULLY RESOURCED, QUALITY PRE K-12 PUBLIC EDUCATION, AND (3) TO ENGAGE IN ANY AND ALL OTHER LAWFUL ACTIVITIES INCIDENTAL TO AND IN PURSUIT OF THE FOREGOING PURPOSES, EXCEPT AS SPECIFICALLY RESTRICTED BY THE ARTICLES OF ORGANIZATION

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** ☑ **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** ☑ **No**

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured 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

4a (Code) (Expenses $ 3,231,998 including grants of $ 1,739,487) (Revenue $)

OPPORTUNITY TO LEARN - THE OPPORTUNITY TO LEARN PHILANTHROPIC STRATEGY IS AN EFFORT TO INCREASE RESOURCE ACCOUNTABILITY AND ENSURE THAT RACE IS NO LONGER A SIGNIFICANT PREDICTOR OF EDUCATIONAL RESOURCE ACCESS OR OUTCOMES THE SCHOTT FOUNDATION WILL USE ITS ADVOCACY MANAGEMENT FIRM PHILANTHROPIC MODEL TO MANAGE A GRANT MAKING STRATEGY TO BUILD THE PUBLIC WILL TO INCREASE THE NUMBER OF STATES THAT ADOPT AN "OPPORTUNITY TO LEARN" REFORM FRAMEWORK AND CREATE A FEDERAL RIGHT TO AN OPPORTUNITY TO LEARN

4b (Code) (Expenses $ 484,783 including grants of $ 306,000) (Revenue $)

BLACK MALE DONOR COLLABORATIVE - THE BLACK MALE DONOR COLLABORATIVE AIMS TO IDENTIFY SUCCESSFUL PROGRAM INTERVENTIONS AND POLICY LEVERS TO ADDRESS THE ACHIEVEMENT DISPARITIES IMPACTING THE MOST EXTREMELY UNDERPERFORMING GROUP IN NEW YORK - BLACK MALES

4c (Code) (Expenses $ 282,450 including grants of $) (Revenue $)

OTHER FUNDING TO ADVOCATE FOR EQUITABLE RESOURCES FOR PRE K-12 SCHOOLS TO PROVIDE EXCELLENT EDUCATION FOR ALL CHILDREN WITH AN EMPHASIS ON POOR CHILDREN AND CHILDREN OF COLOR, VIA IMPROVED PUBLIC POLICY, LEADERSHIP AND INCREASED PUBLIC WILL

(Code) (Expenses $ 3,740 including grants of $) (Revenue $)

EDUCATION VOTERS INSTITUTE

(Code) (Expenses $ 1,332 including grants of $ 1,270) (Revenue $)

WOMEN'S PIPELINE FOR CHANGE

4d Other program services (Describe in Schedule O)

(Expenses $ 5,072 including grants of $ 1,270) (Revenue $)

4e **Total program service expenses** ▶$ 4,004,303

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)? *If "Yes," complete Schedule A*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4	Yes	
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
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? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10	Yes	
11	If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line10? *If "Yes," complete Schedule D, Part VI.*	11a	Yes	
b	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? *If "Yes," complete Schedule D, Part VII.*	11b		No
c	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? *If "Yes," complete Schedule D, Part VIII.*	11c		No
d	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? *If "Yes," complete Schedule D, Part IX.*	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X.*	11e		No
f	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 (ASC 740)? *If "Yes," complete Schedule D, Part X.*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI, XII, and XIII*	12a	Yes	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional*	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Part I*	14b		No
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 U S ? *If "Yes," complete Schedule F, Part II and IV*	15		No
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 U S ? *If "Yes," complete Schedule F, Part III and IV*	16		No
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? *If "Yes," complete Schedule G, Part I*	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18	Yes	
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospitals? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? **Note.** All Form 990 filers that operated one or more hospitals must attach audited financial statements	20b		

Part IV Checklist of Required Schedules *(continued)*

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*	21	Yes	
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*	22		No
23	Did the organization answer "Yes" to Part VII, Section A, questions 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*	23	Yes	
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 questions 24b–24d and complete Schedule K. If "No," go to line 25*	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
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?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
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*	25a		No
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*	25b		No
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*	26		No
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*	27		No
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*	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or owner? *If "Yes," complete Schedule L, Part IV*	28c		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	32		No
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*	33		No
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*	34	Yes	
35a	Is any related organization a controlled entity of the filing organization within the meaning of section 512(b)(13)?	35a	Yes	
b	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b	Yes	
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*	36		No
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*	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? **Note.** All Form 990 filers are required to complete Schedule O	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response to any question in this Part V . . . . ☐

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable	1a	39			
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	1b	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			1c	Yes	
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	19			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?			2b	Yes	
	Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)					
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			3a	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No," provide an explanation in Schedule O*			3b	Yes	
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 or securities account)?			4a		No
b	If "Yes," enter the name of the foreign country ▶ See instructions for 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? . .			5a		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			5b		No
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?			5c		
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?			6a		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			6b		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	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?			7a		No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			7c		No
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			7e		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . .			7f		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			7g		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			7h		
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?			8		
9	**Sponsoring organizations maintaining donor advised funds.**					
a	Did the organization make any taxable distributions under section 4966?			9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?			9b		
10	**Section 501(c)(7) organizations.** Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12 . . .	10a				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b				
11	**Section 501(c)(12) organizations.** Enter					
a	Gross income from members or shareholders	11a				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** All 501(c)(29) organizations must list in Schedule O each state in which they are licensed to issue qualified health plans, the amount of reserves required by each state, and the amount of reserves the organization allocated to each state			13a		
b	Enter the aggregate amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b				
c	Enter the aggregate amount of reserves on hand	13c				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			14a		No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . .			14b		

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

Check if Schedule O contains a response to any question in this Part VI . . . . ☑

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	1a 13			
b	Enter the number of voting members included in line 1a, above, who are independent	1b 13			
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?		2	Yes	
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?		3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		4		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		5		No
6	Did the organization have members or stockholders?		6		No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		7a		No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following				
a	The governing body?		8a	Yes	
b	Each committee with authority to act on behalf of the governing body?		8b	Yes	
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		9		No

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

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a		No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b		
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review the Form 990			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	Yes	
b	Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes	
13	Did the organization have a written whistleblower policy?	13	Yes	
14	Did the organization have a written document retention and destruction policy?	14	Yes	
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	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	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?	16a		No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed ▶MA , NY

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you made 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 made its governing documents, conflict of interest policy, and financial statements available to the public See Additional Data Table

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶

ALFRED T MILLER JR SR VP OF OPE
675 MASSACHUSETTS AVENUE 8TH FLOOR
CAMBRIDGE, MA 02139
(617) 876-7700

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

Check if Schedule O contains a response to any question in this Part VII . . . . ☐

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any 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, or 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 neither the organization nor any related organizations compensated any current or former officer, director, or trustee

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee) Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
(1) GREG JOBIN-LEEDS CO-CHAIR	1 00	X		X				0	0	0
(2) BAISHALI RINKU SEN CO-CHAIR	1 00	X		X				0	0	0
(3) MICHELLE COFFEY CLERK	1 00	X		X				0	0	0
(4) MARIA JOBIN-LEEDS TREASURER	1 00	X		X				0	0	0
(5) MAISIE CHIN BOARD DIRECTOR	1 00	X						0	0	0
(6) ANDREW GILLUM BOARD DIRECTOR	1 00	X						0	0	0
(7) JACKIE JENKINS-SCOTT BOARD DIRECTOR	1 00	X						0	0	0
(8) GERARD LEEDS BOARD DIRECTOR	1 00	X						0	0	0
(9) LILO LEEDS BOARD DIRECTOR	1 00	X						0	0	0
(10) IAN INABA BOARD DIRECTOR	1 00	X						0	0	0
(11) DEBORAH LABELLE BOARD DIRECTOR	1 00	X						0	0	0
(12) ALVIN LOUIS STARKS BOARD DIRECTOR	1 00	X						0	0	0
(13) ANTONIA DARDER BOARD DIRECTOR	1 00	X						0	0	0
(14) JOHN H JACKSON PRESIDENT/CEO, EX-OFFICIO	40 00			X				330,594	0	39,184
(15) ALFRED T MILLER JR SENIOR VP OF OPERATIONS	40 00			X				145,426	0	29,409
(16) CASSIE SCHWERNER SENIOR VP OF PROGRAMS	40 00				X			168,298	0	45,547
(17) ANN E BEAUDRY VP OF DEVELOPMENT & STRATE	40 00					X		109,818	0	17,673

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

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee): Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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

		(D)	(E)	(F)
1b	**Sub-Total** . . . . ▶			
c	**Total from continuation sheets to Part VII, Section A** . . . . ▶			
d	**Total (add lines 1b and 1c)** . . . . ▶	754,136	0	131,813

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶4

			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*	3		No
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*	4	Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	5		No

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 Report compensation for the calendar year ending with or within the organization's tax year

(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 of compensation from the organization ▶0

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a Federated campaigns . . . **1a**					
	b Membership dues **1b**					
	c Fundraising events **1c**					
	d Related organizations . . . **1d**	1,572,000				
	e Government grants (contributions) **1e**					
	f All other contributions, gifts, grants, and similar amounts not included above **1f**	1,222,345				
	g Noncash contributions included in lines 1a-1f $					
	h **Total.** Add lines 1a-1f . . . . ▶		2,794,345			
Program Service Revenue		Business Code				
	2a					
	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) . . . . . ▶		120,467			120,467
	4 Income from investment of tax-exempt bond proceeds . . ▶					
	5 Royalties . . . . ▶					

	(i) Real	(ii) Personal
6a Gross rents		
b Less rental expenses		
c Rental income or (loss)		

		(A)	(B)	(C)	(D)
d Net rental income or (loss) . . . . ▶					

	(i) Securities	(ii) Other
7a Gross amount from sales of assets other than inventory		
b Less cost or other basis and sales expenses	27,366	
c Gain or (loss)	-27,366	

		(A)	(B)	(C)	(D)
d Net gain or (loss) . . . . ▶		-27,366			-27,366
8a Gross income from fundraising events (not including $ ______ of contributions reported on line 1c) See Part IV, line 18 . . . **a**	74,673				
b Less direct expenses . . . **b**	21,088				
c Net income or (loss) from fundraising events . . ▶		53,585			53,585
9a Gross income from gaming activities See Part IV, line 19 . . . **a**					
b Less direct expenses . . . **b**					
c Net income or (loss) from gaming activities . . . ▶					
10a Gross sales of inventory, less returns and allowances . **a**					
b Less cost of goods sold . . **b**					
c Net income or (loss) from sales of inventory . . ▶					
Miscellaneous Revenue	Business Code				
11a MANAGEMENT FEE-RELATED	561000	35,000		35,000	
b					
c					
d All other revenue					
e **Total.** Add lines 11a–11d . . . . . . ▶		35,000			
12 **Total revenue.** See Instructions . . . ▶		2,976,031	0	35,000	146,686

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)
Check if Schedule O contains a response to any question in this Part IX . . . .

	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 United States See Part IV, line 21	2,046,757	2,046,757		
2	Grants and other assistance to individuals in the United States See Part IV, line 22				
3	Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	797,428	484,155	251,990	61,283
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	723,415	583,087	140,328	
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	67,273	39,885	23,138	4,250
9	Other employee benefits	258,452	186,851	72,217	-616
10	Payroll taxes	58,271	30,477	24,265	3,529
11	Fees for services (non-employees)				
a	Management				
b	Legal	17,057	3,785	13,272	
c	Accounting	54,804		54,804	
d	Lobbying				
e	Professional fundraising *See Part IV, line 17* . .				
f	Investment management fees	35,188		35,188	
g	Other	240,810	184,672	38,783	17,355
12	Advertising and promotion	8,820	1,510	7,310	
13	Office expenses	16,291	6,364	9,817	110
14	Information technology	24,347	7,599	14,004	2,744
15	Royalties . .				
16	Occupancy	191,555	119,352	65,991	6,212
17	Travel	124,285	96,847	25,410	2,028
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	138,680	133,218	4,806	656
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	30,338	17,720	11,384	1,234
23	Insurance	8,209	502	7,707	
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24f If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O)				
a	TELEPHONE	47,733	34,282	10,813	2,638
b	TEMPORARY SERVICES	33,235	0	33,235	0
c	MOVING EXPENSE	27,075	189	26,886	0
d	PRINTING & PUBLICATIONS	17,450	13,675	2,185	1,590
e					
f	All other expenses	33,326	13,376	19,717	233
25	**Total functional expenses.** Add lines 1 through 24f	5,000,799	4,004,303	893,250	103,246
26	**Joint costs.** Check here ▶ ☐ if following SOP 98-2 (ASC 958-720) 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			326,241	1	1,421,165
	2	Savings and temporary cash investments			1,141,879	2	896,914
	3	Pledges and grants receivable, net				3	
	4	Accounts receivable, net			9,318,497	4	1,711,968
	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			34,280	9	21,027
	10a	Land, buildings, and equipment cost or other basis *Complete Part VI of Schedule D*	10a	109,996			
	b	Less accumulated depreciation	10b	46,565	48,354	10c	63,431
	11	Investments—publicly traded securities			1,061,270	11	6,435,545
	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			28,904	15	32,075
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)			11,959,425	16	10,582,125
Liabilities	17	Accounts payable and accrued expenses			161,170	17	230,681
	18	Grants payable			500,000	18	772,800
	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 (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24) Complete Part X of Schedule D				25	
	26	**Total liabilities.** Add lines 17 through 25			661,170	26	1,003,481
Net Assets or Fund Balances		**Organizations that follow SFAS 117, check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.**					
	27	Unrestricted net assets			1,248,735	27	1,200,824
	28	Temporarily restricted net assets			10,049,520	28	8,377,820
	29	Permanently restricted net assets				29	
		Organizations that do not follow SFAS 117, check here ▶ ☐ 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			11,298,255	33	9,578,644
	34	Total liabilities and net assets/fund balances			11,959,425	34	10,582,125

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12) . . .	1	2,976,031
2	Total expenses (must equal Part IX, column (A), line 25)	2	5,000,799
3	Revenue less expenses Subtract line 2 from line 1	3	-2,024,768
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . .	4	11,298,255
5	Other changes in net assets or fund balances (explain in Schedule O)	5	305,157
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	9,578,644

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII . . . . ☐

			Yes	No
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? . .	2a		No
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
c	If "Yes," to 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	2c	Yes	
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 separate basis, consolidated basis, or both ☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separated 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?	3a		No
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 . .	3b		

SCHEDULE A (Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

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

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

1 ☐ A church, convention of churches, or association of churches **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☑ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

10 ☐ An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**

11 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a ☐ Type I **b** ☐ Type II **c** ☐ Type III - Functionally integrated **d** ☐ Type III - Other

e ☐ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box ☐

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

		Yes	No
(i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?	**11g(i)**		
(ii) a family member of a person described in (i) above?	**11g(ii)**		
(iii) a 35% controlled entity of a person described in (i) or (ii) above?	**11g(iii)**		

h Provide the following information about the supported organization(s)

(i) Name of supported organization	**(ii)** EIN	**(iii)** Type of organization (described on lines 1- 9 above or IRC section (see instructions))	**(iv)** Is the organization in col (i) listed in your governing document? Yes	No	**(v)** Did you notify the organization in col (i) of your support? Yes	No	**(vi)** Is the organization in col (i) organized in the U S ? Yes	No	**(vii)** Amount of support?
Total									

Part II **Support Schedule for Organizations Described in IRC 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 or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	**(a)** 2007	**(b)** 2008	**(c)** 2009	**(d)** 2010	**(e)** 2011	**(f)** Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	4,158,300	5,270,100	3,043,575	13,558,997	2,794,345	28,825,317
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	4,158,300	5,270,100	3,043,575	13,558,997	2,794,345	28,825,317
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)						20,829,152
6 **Public Support.** Subtract line 5 from line 4						7,996,165

Section B. Total Support

Calendar year (or fiscal year beginning in)	**(a)** 2007	**(b)** 2008	**(c)** 2009	**(d)** 2010	**(e)** 2011	**(f)** Total
7 Amounts from line 4	4,158,300	5,270,100	3,043,575	13,558,997	2,794,345	28,825,317
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	47,688	28,444	22,008	18,939	120,467	237,546
9 Net income from unrelated business activities, whether or not the business is regularly carried on	30,000	35,000	35,000	35,000	35,000	170,000
10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets			34,258	16,850	74,673	125,781
11 **Total support** (Add lines 7 through 10)						29,358,644

12 Gross receipts from related activities, etc (See instructions)	12	65,675

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

Section C. Computation of Public Support Percentage

14 Public Support Percentage for 2011 (line 6 column (f) divided by line 11 column (f))	14	27 240 %
15 Public Support Percentage for 2010 Schedule A, Part II, line 14	15	27 280 %

16a **33 1/3% support test—2011.** 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 ▶☐

b **33 1/3% support test—2010.** If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶☐

17a **10%-facts-and-circumstances test—2011.** If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶☑

b **10%-facts-and-circumstances test—2010.** If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶☐

18 **Private Foundation** If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions ▶☐

Part III **Support Schedule for Organizations Described in IRC 509(a)(2)**
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in)	**(a)** 2007	**(b)** 2008	**(c)** 2009	**(d)** 2010	**(e)** 2011	**(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)** 2007	**(b)** 2008	**(c)** 2009	**(d)** 2010	**(e)** 2011	**(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 501(c)(3) organization, check this box and **stop here** ▶

Section C. Computation of Public Support Percentage

15 Public Support Percentage for 2011 (line 8 column (f) divided by line 13 column (f))	**15**	
16 Public support percentage from 2010 Schedule A, Part III, line 15	**16**	

Section D. Computation of Investment Income Percentage

17 Investment income percentage for **2011** (line 10c column (f) divided by line 13 column (f))	**17**	
18 Investment income percentage from **2010** Schedule A, Part III, line 17	**18**	

19a **33 1/3% support tests—2011.** 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—2010.** 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 ▶

Part IV **Supplemental Information.** Supplemental Information. Complete this part to provide the explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

THE SCHOTT FOUNDATION MEETS THE "FACTS AND CIRCUMSTANCES" TESTTHE SCHOTT FOUNDATION FOR PUBLIC EDUCATION (THE "FOUNDATION") QUALIFIES AS A "PUBLICLY SUPPORTED" ORGANIZATION UNDER SECTION 170(B)(1)(A)(VI) OF THE CODE BECAUSE IT SATISFIES THE "FACTS AND CIRCUMSTANCES" TEST SET FORTH IN TREAS REG 1 170A-9(F)(3) THE FOUNDATION NORMALLY RECEIVES AT LEAST 10% OF ITS SUPPORT FROM THE GENERAL PUBLIC, AND IT CARRIES ON A CONTINUOUS AND BONA FIDE PROGRAM OF SOLICITATION OF PUBLIC SUPPORT MOREOVER, THE FOUNDATION MEETS THE FOLLOWING FACTORS ENUMERATED IN THE REGULATIONS AS BEING INDICATIVE OF PUBLIC SUPPORT 1 PERCENTAGE OF FINANCIAL SUPPORT TREAS REG 1 170A-9(F)(3)(III) DURING THE FIVE-YEAR PERIOD ENDING ON JUNE 30, 2012, THE PORTION OF THE FOUNDATION'S SUPPORT THAT QUALIFIES AS ELIGIBLE PUBLIC SUPPORT IS 27 24%, WELL IN EXCESS OF THE 10% THRESHOLD 2 SOURCES OF SUPPORT TREAS REG 1 170A-9(F)(3)(IV) DURING THE PAST FIVE TAX YEARS, THE FOUNDATION HAS RECEIVED CONTRIBUTIONS FROM A RANGE OF DONORS, INCLUDING PRIVATE INDIVIDUALS AND FAMILIES, CORPORATIONS, PRIVATE FOUNDATIONS AND PUBLIC CHARITIES 3 REPRESENTATIVE GOVERNING BODY TREAS REG 1 170A-9(F)(3)(V) THE FOUNDATION'S TWELVE-MEMBER BOARD OF DIRECTORS CLEARLY REPRESENTS BROAD PUBLIC INTERESTS A MAJORITY OF THE DIRECTORS MEET THIS REQUIREMENT BECAUSE THEY ARE PUBLIC OFFICIALS ACTING IN THEIR CAPACITIES AS SUCH, PERSONS HAVING SPECIAL KNOWLEDGE OR EXPERTISE IN THE EDUCATION FIELD IN WHICH THE FOUNDATION OPERATES, AND OTHERS WHO REPRESENT A BROAD CROSS-SECTION OF THE COMMUNITY SEE TREAS REG 1 170A-9(F)(3)(V) THE FOLLOWING ARE BRIEF BIOGRAPHIES OF THE FOUNDATION'S DIRECTORS GREG JOBIN-LEEDS GREG JOBIN-LEEDS IS CO-FOUNDER AND CO-CHAIR OF THE BOARD OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN 1993, UNDER MR JOBIN-LEEDS' LEADERSHIP, SCHOTT BEGAN FUNDING THE CAMPAIGN FOR FISCAL EQUITY (CFE) AND LATER HELPED FOUND THE ALLIANCE FOR QUALITY EDUCATION (AQE) SCHOTT RECRUITED THE LEADERSHIP AND PROVIDED THE START-UP FUNDING FOR THE EARLY EDUCATION FOR ALL (EEA) CAMPAIGN IN MASSACHUSETTS, AND REGULARLY PUBLISHES STATE REPORT CARDS ON "PUBLIC EDUCATION AND BLACK MALE STUDENTS " IN PARTNERSHIP WITH TEACHER'S COLLEGE AND COLUMBIA UNIVERSITY, MR JOBIN-LEEDS HELPED LAUNCH THE NATIONAL ACADEMY FOR EXCELLENT TEACHING TO IMPROVE TEACHING IN URBAN SCHOOLS MR JOBIN-LEEDS IS THE FOUNDING CHAIR OF PROGRESSIVE MAJORITY'S LEADERSHIP CIRCLE, WHICH IS HIGHLY SUCCESSFUL AT ELECTING BOLD STATE CANDIDATES COMMITTED TO RACIAL AND ECONOMIC JUSTICE, PUBLIC EDUCATION AND HEALTH CARE HE IS A FOUNDING EXECUTIVE BOARD MEMBER OF CONGRESSWOMAN BARBARA LEE'S ONE VOICE PAC, WHICH IS SUCCESSFUL IN ELECTING PROGRESSIVE FEDERAL CANDIDATES WHO HAVE STRONG PLATFORMS ON PUBLIC EDUCATION, RACIAL AND ECONOMIC JUSTICE EARLY IN HIS CAREER, HE WORKED AS A HIGH SCHOOL ENGLISH TEACHER, THEN HE TRAINED ADULT LITERACY TEACHERS AND MORE RECENTLY HE HAS WORKED TO INCREASE POLITICAL ACCESS FOR DISENFRANCHISED POPULATIONS MR JOBIN-LEEDS HAS A MASTER'S DEGREE FROM TEACHER'S COLLEGE, COLUMBIA UNIVERSITY, AND MORE THAN TWENTY-FIVE YEARS OF EDUCATION, PUBLIC POLICY, MEDIA, COMMUNITY ORGANIZING AND LEADERSHIP EXPERIENCE LILO LEEDS LILO J LEEDS CREATED THE FIRST ON-SITE DAY CARE AND INFANT CARE CENTER ON LONG ISLAND AT CMP MEDIA INC SHE ALSO STARTED AN AFTER SCHOOL ON-SITE CENTER AND A SUMMER DAY CAMP FOR CMP MEDIA INC EMPLOYEE'S SCHOOL AGED CHILDREN LILO LEEDS IS CO-FOUNDER AND CO-CHAIRPERSON OF THE INSTITUTE FOR STUDENT ACHIEVEMENT, A NON-PROFIT ORGANIZATION COMMITTED TO ECONOMIC AND SOCIAL CHANGE IN DISADVANTAGED COMMUNITIES THROUGH EDUCATION AND YOUTH PROGRAMS SHE AND HER HUSBAND GERARD, CREATED THE MANHASSET-BASED INSTITUTE IN 1990 CORPORATE ENTREPRENEURS, GERARD AND LILO LEEDS, CO-FOUNDED CMP MEDIA INC , A LEADING PUBLISHER OF BUSINESS NEWSPAPERS, MAGAZINES AND INFORMATION SERVICES SPECIALIZING IN HIGH TECHNOLOGY LILO LEEDS IS ONE OF THE FOUNDERS AND DIRECTORS OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION, AN ORGANIZATION DEVOTED TO DEVELOPING AND STRENGTHENING THE MOVEMENT FOR EQUITY IN EDUCATION AND CHILDCARE LILO LEEDS IS A MEMBER OF THE CHILD CARE COUNCIL OF NASSAU COUNTY, THE GREAT NECK/MANHASSET COMMUNITY CHILD CARE PARTNERSHIP, AND SERVES ON THE ADVISORY BOARD OF THE ARNOLD AND JOAN SALTZMAN/HOFSTRA CHILD CARE CENTER LILO LEEDS WAS AN ASSOCIATE TRUSTEE OF NORTH SHORE UNIVERSITY HOSPITAL AND IS ON THE BOARD OF THE NORTH SHORE CHILD & FAMILY GUIDANCE LILO LEEDS SERVES AS AN HONOREE OF WOMEN ON THE JOB, WAS NAMED "WOMAN OF THE YEAR" BY THE LONG ISLAND ASSOCIATION, WAS AN HONOREE OF THE NATIONAL ORGANIZATION OF WOMEN AND RECEIVED THE BARBARA KRAMER MEMORIAL AWARD FROM THE PORT WASHINGTON CHILDREN'S CENTER MR AND MRS LEEDS WERE RECOGNIZED AS HONORARY CITIZENS OF ROOSEVELT FOR THEIR WORK WITH THE STAR PROGRAM FOR THE ROOSEVELT HIGH SCHOOL, AND FOR THE "WRITING TO READ" PROGRAM FOR KINDERGARTEN AND FIRST GRADE, IN WESTBURY MRS LEEDS IS A REFUGEE FROM HITLER GERMANY AND CAME TO THE US IN 1939 SHE HOLDS A B S IN MATHEMATICS FROM QUEENS COLLEGE AND AN M A FROM SUNY AT STONY BROOK SHE RECEIVED AN HONORARY DOCTORATE FROM BOTH INSTITUTIONS MRS LEEDS IS A LONG-TIME RESIDENT OF LONG ISLAND AND HAS FIVE GROWN CHILDREN BAISHALI RINKU SEN BAISHALI RINKU SEN IS CO-CHAIR OF THE BOARD OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION A LEADING FIGURE IN THE RACIAL JUSTICE MOVEMENT, BAISHALI HAS POSITIONED THE APPLIED RESEARCH CENTER (ARC) AS THE HOME FOR MEDIA AND ACTIVISM ON RACIAL JUSTICE SHE HAS EXTENSIVE EXPERTISE IN RACE, FEMINISM, IMMIGRATION AND ECONOMIC JUSTICE OVER THE COURSE OF HER CAREER, BAISHALI HAS WOVEN TOGETHER JOURNALISM AND ORGANIZING TO FURTHER SOCIAL CHANGE SHE ALSO HAS SIGNIFICANT EXPERIENCE IN PHILANTHROPY, AS VICE CHAIR OF THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION, AND AS AN ADVISORY COMMITTEE MEMBER OF THE PHILANTHROPIC INITIATIVE FOR RACIAL EQUITY PREVIOUSLY, SHE WAS THE CO-DIRECTOR OF THE CENTER FOR THIRD WORLD ORGANIZING BAISHALI HAS WRITTEN EXTENSIVELY ABOUT IMMIGRATION, COMMUNITY ORGANIZING AND WOMEN'S LIVES FOR A WIDE VARIETY OF PUBLICATIONS INCLUDING THE HUFFINGTON POST, JACK AND JILL POLITICS, THE SAN FRANCISCO CHRONICLE, FORBES COM, ALTERNET, TOMPAINE.COM, AND RACEWIRE HER BOOK, STIR IT UP LESSONS IN COMMUNITY ORGANIZING (JOSSEY-BASS) WAS COMMISSIONED BY THE MS FOUNDATION FOR WOMEN AND RELEASED IN THE FALL OF 2003 HER LATEST BOOK, THE ACCIDENTAL AMERICAN IMMIGRATION AND CITIZENSHIP IN THE AGE OF GLOBALIZATION (BERRETT-KOEHLER) WON THE NAUTILUS BOOK AWARD SILVER MEDAL PREVIOUSLY, BAISHALI SERVED AS THE COMMUNICATIONS DIRECTOR AND THE DIRECTOR OF THE TRANSNATIONAL RACIAL JUSTICE INITIATIVE AT ARC BAISHALI STARTED HER ORGANIZING CAREER AS A STUDENT ACTIVIST AT BROWN UNIVERSITY, FIGHTING RACE, GENDER AND CLASS DISCRIMINATION ON CAMPUSES SHE RECEIVED A B A IN WOMEN'S STUDIES FROM BROWN UNIVERSITY IN 1988 AND AN M S IN JOURNALISM AT COLUMBIA UNIVERSITY IN 2005 HER AWARDS AND HONORS INCLUDE THE 2009 NORTHSTAR FUND NEWS PRIZE, THE 2008 PROGRESSIVE LEADERSHIP AWARD FROM CITIZEN ACTION OF NEW YORK, AND BEING NAMED BY UTNE READER ONE OF THE FIFTY ACTIVISTS, ARTISTS, SCIENTISTS, AND NON-CONFORMISTS WHO MADE THEIR LIST OF VISIONARIES WORKING IN SOCIAL JUSTICE AND COMMUNITY ORGANIZATION, TRANSFORMING TECHNOLOGY AND THE WORLD IN 2008 MICHELLE COFFEY AS EXECUTIVE DIRECTOR, MICHELLE COFFEY DESIGNS, IMPLEMENTS AND FURTHERS THE STRATEGIC AGENDA, LEADERSHIP AND VISION OF LAMBENT FOUNDATION THROUGH INNOVATIVE GRANT MAKING, LAMBENT FOUNDATION SUPPORTS THE INTERSECTIONS OF ARTS AND CULTURE AS CRITICAL STRATEGIES FOR SOCIAL CHANGE PRIOR TO THE CREATION OF LAMBENT FOUNDATION IN JANUARY 2009, MS COFFEY WAS DIRECTOR OF STARRY NIGHT FUND AND SENIOR PHILANTHROPIC ADVISOR AT TIDES FOUNDATION WITH A GLOBAL LENS, HER AREAS OF FOCUS INCLUDED HUMAN RIGHTS, WOMEN/GIRLS, CRIMINAL JUSTICE REFORM, ARTS AND CULTURE AND HIV/AIDS MICHELLE COFFEY JOINED TIDES AS A PROGRAM OFFICER IN THE NEW YORK OFFICE IN 2001 PRIOR TO JOINING TIDES, SHE WORKED ON NATIONAL CULTURAL POLICY ISSUES AND SERVED AS A PROGRAM OFFICER FOR THE NEW YORK FOUNDATION FOR THE ARTS IN ADDITION, SHE SERVES ON THE BOARDS OF THE CULTURE PROJECT, THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION AND THE BROWNSVILLE MULTI-SERVICE FAMILY HEALTH CARE CENTER IN EAST NEW YORK ANDREW GILLUM CITY COMMISSIONER ANDREW D GILLUM, AN ALUMNUS OF FLORIDA A&M UNIVERSITY (FAMU), FORMER PRESIDENT OF THE STUDENT GOVERNMENT ASSOCIATION, AND FAMU'S FIRST STUDENT MEMBER OF THE BOARD OF TRUSTEES BECAME THE YOUNGEST PERSON EVER ELECTED TO THE FOUR-MEMBER TALLAHASSEE CITY COMMISSION IN FEBRUARY 2003 WHEN ELECTED AT THE AGE OF 23, HE WAS A STUDENT MAJORING IN POLITICAL SCIENCE PASSION FOR PUBLIC SERVICE, AND THE ABILITY TO MOTIVATE AND MOBILIZE PEOPLE TO ACTION GARNERED HIS RE-ELECTION IN AUGUST 2004 TO A FOUR YEAR TERM ON THE COMMISSION

Explanation

SCHEDULE A, PART IV, SUPPLEMENTAL INFORMATION COMMISSIONER GILLUM HAS HELD PROMINENT LEADERSHIP ROLES SUCH AS MAYOR PRO TEM, CHAIRMAN-CAPITAL REGION TRANSPORTATION PLANNING AGENCY AND LEAD COMMISSIONER FOR THE LONG RANGE COMMUNITY BASED TARGET ISSUE COMMITTEE IN KEEPING WITH HIS MANTRA TO UPLIFT AND BUILD THE COLLECTIVE COMMUNITY, ANDREW HAS CHAMPIONED SEVERAL COMMUNITY INITIATIVES INCLUDING THE NIMS MIDDLE SCHOOL DIGITAL HARMONY PILOT PROGRAM, THE LANDLORD TENANT MEDIATION PROGRAM, THE CODE ENFORCEMENT AMNESTY PROGRAM, AND THE CREATION OF THE SILVER LAKE NEIGHBORHOOD PARK COMMISSIONER GILLUM SERVED AS FIELD ORGANIZER AND STATEWIDE DIRECTOR OF THE "ARRIVE WITH 5" PROGRAM WITH PEOPLE FOR THE AMERICAN WAY FOUNDATION (PFAWF) HE ORGANIZED THE LARGEST "ARRIVE WITH 5" GET-OUT-THE-VOTE CAMPAIGN IN FLORIDA'S HISTORY HE ALSO WORKED AS DEPUTY POLITICAL DIRECTOR WITH THE FLORIDA DEMOCRATIC PARTY HE WAS THE INAUGURAL NATIONAL DIRECTOR OF THE YOUNG ELECTED OFFICIALS NETWORK WITH PFAWF, IN WHICH HE INITIATED AND SPEARHEADED A PROGRAM THAT UNITES ELECTED OFFICIALS AGE 35 AND UNDER IN A NETWORK THAT SUPPORTS THEM WITH LEADERSHIP AND PERSONAL DEVELOPMENT TRAINING AND PUBLIC POLICY SUPPORT HIS SUCCESS GARNERED HIM THE POSITION OF DIRECTOR OF YOUTH LEADERSHIP PROGRAMS FOR PFAWF IN THIS ROLE HE OVERSEES THE STRATEGIC PLANNING, IMPLEMENTATION, AND DEVELOPMENT OF THREE PROGRAM AREAS YOUNG PEOPLE FOR, YOUNG ELECTED OFFICIALS NETWORK, AND THE YOUNG PROFESSIONALS ACTIVIST NETWORK COMMISSIONER GILLUM SERVES AS A MEMBER OF THE BOARD OF DIRECTORS FOR THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION HE ALSO HAS BEEN RECOGNIZED AS AN EMERGING LEADER BY THE CONGRESSIONAL BLACK CAUCUS, JET MAGAZINE, EBONY MAGAZINE, THE ASSOCIATION OF TRIAL LAWYERS FOR AMERICA (ATLA), THE DRUM MAJOR INSTITUTE, IMPACT AND FAMU'S DR MARTIN LUTHER KING JR LEADERSHIP AWARD GERARD LEEDS GERARD LEEDS IS A CO-FOUNDER AND MEMBER OF THE BOARD OF DIRECTORS OF THE INSTITUTE FOR STUDENT ACHIEVEMENT, INC , WHICH HE FOUNDED WITH HIS WIFE, LILO, IN 1990 IN 1971, PRIOR TO ESTABLISHING THE INSTITUTE, GERARD AND LILO LEEDS FOUNDED CMP MEDIA INC , A MAJOR PUBLISHER OF BUSINESS NEWSPAPERS, MAGAZINES, INTERNET AND OTHER INFORMATION SERVICES FOR THE HIGH-TECH INDUSTRIES THE COMPANY'S SOCIALLY RESPONSIBLE POLICIES PLACED IT IN FORTUNE MAGAZINE AS ONE OF THE 100 BEST COMPANIES TO WORK FOR, AND IN WORKING MOTHER, AS ONE OF THE BEST COMPANIES FOR WOMEN WORKERS THE COMPANY INSTITUTED A MAJOR ON-SITE CHILDCARE CENTER, A STRONG DIVERSITY PROGRAM, AND AN ACTIVE EMPLOYEE-RUN FOUNDATION IN 1988, GERARD AND LILO LEEDS TRANSFERRED THE MANAGEMENT OF THE COMPANY TO THE NEXT GENERATION AND MICHAEL LEEDS TOOK OVER AS PRPRESIDENT AND CEO THE LEEDS MADE THE CHALLENGE OF EDUCATING CHILDREN AT RISK THEIR PRINCIPAL FOCUS IN ADDITION TO FOUNDING THE INSTITUTE FOR STUDENT ACHIEVEMENT, THEY ARE ON THE BOARDS OF SEVERAL OTHER ORGANIZATIONS WORKING ON EDUCATION ISSUES THESE INCLUDE THE ALLIANCE FOR EXCELLENT EDUCATION, LOCATED IN WASHINGTON, DC, WHOSE GOAL IS TO MAKE EXCELLENT EDUCATION FOR ALL CHILDREN A REALITY, AND THE THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN BOSTON, WHICH FOCUSES ON EARLY CARE IN EDUCATION AND FUNDING FOR QUALITY EDUCATION GERARD AND LILO LEEDS ARE BOTH IMMIGRANTS TO THE UNITED STATES, AND CONSIDER THEIR WORK IN EDUCATION A WAY TO RETURN TO SOCIETY SOME OF THE BUSINESS AND PERSONAL SUCCESS THAT AMERICA HAS ALLOWED THEM TO ACHIEVE GERARD AND LILO LEEDS ARE RECIPIENTS OF A LARGE NUMBER OF CIVIC AWARDS, INCLUDING SOCIALLY RESPONSIBLE ENTREPRENEURS OF THE YEAR, LIA HUMANITARIAN AWARD, OUTSTANDING PHILANTHROPISTS OF THE YEAR FOR NSFRE/L I , WERE HONORED BY THE URBAN LEAGUE OF L I , THE NYS CHAPTER OF NAACP, THE NYS UNITED TEACHERS ASSOCIATION, AND THE AMERICAN JEWISH COMMITTEE THEY WERE CITED BY NEWSDAY IN ITS REPORT ON "100 WHO SHAPED A CENTURY" MR LEEDS HOLDS A BACHELOR OF ARTS AND SCIENCE AND AN HONORARY DOCTORATE FROM ADELPHI UNIVERSITY, AND A MASTERS OF ARTS AND AN HONORARY DOCTORATE FROM THE STATE UNIVERSITY OF NEW YORK AT STONYBROOK HE HAS TAUGHT MANAGEMENT AT LONG ISLAND UNIVERSITY AND HOFSTRA UNIVERSITY, AND LECTURES ANNUALLY TO MBA STUDENTS ON SOCIALLY RESPONSIBLE BUSINESS MANAGEMENT MARIA JOBIN-LEEDS AS CO-FOUNDER AND MANAGING PARTNER OF THE JOBIN-LEEDS PARTNERSHIP FOR DEMOCRACY AND EDUCATION, LLC, MARIA WITH HER SPOUSE GREG PLANS AND DIRECTS THE FIRM'S RESEARCH, INVESTMENTS, PROGRAMS, CLIENT SERVICES, GRANTS MANAGEMENT, STRATEGIC ALLIANCES, COMMUNICATIONS AND OPERATIONS SHE IS LEADING THE PARTNERSHIP'S FORMATION OF A PIPELINE FOR PROGRESSIVE WOMEN CANDIDATES IN MASSACHUSETTS FOR MORE THAN A DECADE, MARIA HAS MARSHALED RESOURCES FOR CANDIDATES AND BALLOT QUESTIONS THAT MOTIVATE THE ELECTORATE AND SPEAK TO ISSUES THAT ARE IMPORTANT TO LOW INCOME COMMUNITIES, AFRICAN AMERICANS, LATINOS, IMMIGRANTS AND WOMEN MARIA'S CAREER IN PHILANTHROPY AND CIVIC ENGAGEMENT BEGAN AT AN EARLY AGE FROM WATCHING AND HELPING HER PARENTS IN THEIR EFFORTS ON CIVIL RIGHTS AND FEMINISM AND GLOBAL CITIZENSHIP SHE WAS BORN AND LIVED IN PUERTO RICO AS A CHILD, AND SHE SPENT TIME IN THE SUDAN AS A COLLEGE STUDENT, WHERE HER EDUCATION ABOUT THE PRIVILEGES OF CLASS, RACE AND GENDER BEGAN MARIA STARTED HER EDUCATION CAREER AS A HEALTH AND BIOLOGY TEACHER IN A PAROCHIAL, INNER-CITY HIGH SCHOOL SHE SPENT THE FIRST TEN YEARS OF THE HIV/AIDS EPIDEMIC PROVIDING COUNSELING TO PEOPLE TESTING POSITIVE FOR HIV AND TRAINING AIDS EDUCATORS SHE CAME TO UNDERSTAND THAT ONLY BY ADDRESSING A ROOT CAUSE OF THE EPIDEMIC - THE LACK OF POLITICAL POWER ON THE PART OF PEOPLE AFFECTED - WOULD THERE BE ANY CHANCE FOR SUCCESS IN CURBING THE PROBLEM IN 1999, MARIA FOUNDED THE ACCESS STRATEGIES FUND AS CHAIR, WITH THE BOARD AND STAFF, THEY ADDRESS THE POLITICAL ROOT CAUSES OF SOCIAL AND ECONOMIC DISPARITIES ACCESS STRATEGIES FUNDS AND ASSISTS COMMUNITY BASED ORGANIZATIONS IN UNDERREPRESENTED, LOW-INCOME, COMMUNITIES OF COLOR AND WOMEN'S COMMUNITIES TO MAKE THEIR VOICES HEARD IN THE CREATION OF SOUND PUBLIC POLICIES IN MASSACHUSETTS THIS COLLABORATIVE, MOVEMENT BUILDING WORK HAS PRODUCED LARGE INCREASES IN VOTER TURNOUT IN URBAN AFRICAN AMERICAN, LATINO AND IMMIGRANT COMMUNITIES IN THE COMMONWEALTH MARIA RELISHES AND ENCOURAGES THE NOW FREQUENT WINNING CANDIDATES RESULTING FROM COMMUNITY ORGANIZING AND INCREASED VOTER TURNOUT SUPPORTED BY ACCESS AND SHE LOOKS FORWARD TO THE RESULTING SHIFTS IN POLICY AND BUDGET PRIORITIES MARIA'S STRATEGY IS TO BUILD ORGANIZATIONAL CAPACITY FOR PROGRESSIVES AND TO HELP CREATE OPPORTUNITY FOR THESE PERSONNEL TO BECOME LEADERS AND THEIR ORGANIZATIONS AND ISSUES TO BECOME MAINSTREAM AND PROVIDE FOR THE COMMON GOOD MARIA HELPED FOUND THE SCHOTT FOUNDATION FOR PUBLIC EDUCATION IN 1991, SHAPING MISSION, STRATEGY, BOARD, SENIOR STAFF AND OUTCOMES, MOST RECENTLY AS CHAIR OF THE STRATEGY COMMITTEE SCHOTT SUPPORTS THE MOVEMENT FOR HIGH QUALITY EDUCATION BY ELEVATING THE LEADERSHIP OF WOMEN AND SUPPORTING THE GRASSROOTS, BRINGING NATIONAL ATTENTION TO SYSTEMIC DISCRIMINATION AGAINST BLACK BOYS, AND LEADING FUNDING EFFORTS TO BETTER NURTURE ALL CHILDREN MARIA WAS A GRANTS ADVISOR TO TIDES FOUNDATION VOTER ACTION FUND AND IS ON THE BOARD OF CAMPAIGN FOR AMERICA'S FUTURE/IAF THE FORMER COMMONWEALTH COALITION OF MASSACHUSETTS BOARD ALSO SOLICITED HER MEMBERSHIP SHE HAS ADVISED DONORS AND FOUNDATIONS FOCUSED ON ELECTORAL ENGAGEMENT, AND LED WORKSHOPS AT FOUNDATION CONFERENCES SHOWCASING THE WORK OF GRANTEE PARTNERS IN CIVIC ENGAGEMENT HER FINANCIAL INVESTMENT ACUMEN MARRIES SOCIALLY-RESPONSIBLE INVESTING WITH ABOVE-AVERAGE RETURNS SHE IS RECOGNIZED BY THE CRITICAL IMPACT AWARD FROM THE COUNCIL ON FOUNDATIONS TO SCHOTT, THE MONSIGNOR ROMERO AWARD FROM THE FOUNDATION FOR SELF SUFFICIENCY IN CENTRAL AMERICA (FSSCA), AND THE MORGENTHAU AWARD FOR HUMAN RIGHTS FROM THE CAMBRIDGE CITY DEMOCRATIC COMMITTEE SHE WAS A 2008 RECIPIENT OF THE CENTER FOR COMMUNITY CHANGE CHAMPION AWARD HONORING HER EFFORTS IN IMMIGRANT AND POOR PEOPLE'S CIVIC ADVANCEMENT MARIA HELPED TO ESTABLISHED YOUNG SISTERS FOR JUSTICE AT THE BOSTON WOMEN'S FUND, GETTING GIRLS TO DIRECT PHILANTHROPY TO GIRLS MARIA EARNED A MASTERS DEGREE FROM THE HARVARD GRADUATE SCHOOL OF EDUCATION AND BACHELOR'S DEGREE FROM COLBY COLLEGE MAISIE CHIN MAISIE CHIN IS CO-FOUNDER AND CURRENT DIRECTOR OF CADRE-COMMUNITY ASSET DEVELOPMENT RE-DEFINING EDUCATION, AN INDEPENDENT, GRASSROOTS PARENT MEMBERSHIP ORGANIZATION IN SOUTH LOS ANGELES COMPRISED OF LOW-INCOME AFRICAN AMERICAN AND LATINO PARENTS/CAREGIVERS AFTER WORKING IN A K-16 INSTITUTIONAL AND FOUNDATION COLLABORATION AROUND EDUCATION REFORM FOR OVER SIX YEARS, MS CHIN AND A SOUTH LA PARENT LAUNCHED CADRE IN 2001 CADRE'S MISSION IS TO SOLIDIFY AND ADVANCE PARENT LEADERSHIP TO ENSURE THAT ALL CHILDREN ARE RIGHTFULLY EDUCATED REGARDLESS OF WHERE THEY LIVE

SCHEDULE A, PART IV, SUPPLEMENTAL INFORMATION THROUGH HUMAN RIGHTS-BASED COMMUNITY ORGANIZING AND POLICY ADVOCACY, CADRE PARENT LEADERS ARE FIGHTING TO END THE PUSHOUT OF LOW-INCOME FAMILIES OF COLOR FROM PUBLIC SCHOOLS AND THE SCHOOL-TO-PRISON PIPELINE UNDER MS CHIN'S LEADERSHIP CADRE HAS SUCCESSFULLY INFLUENCED POLICY AT THE LOCAL SCHOOL DISTRICT LEVEL AND IS MOVING TOWARDS ADDRESSING STATE AND NATIONAL POLICIES USING THE HUMAN RIGHTS FRAMEWORK RECENTLY IN FEBRUARY 2007, CADRE'S PARENT-LED RIGHT TO EDUCATION CAMPAIGN ACHIEVED A MAJOR VICTORY WHEN ITS HUMAN RIGHTS DOCUMENTATION, PEOPLE'S HEARING, ADVOCACY, AND MEDIA WORK SIGNIFICANTLY HELPED ENSURE THE LOS ANGELES UNIFIED SCHOOL DISTRICT'S PASSAGE OF A NEW DISTRICT-WIDE SCHOOL DISCIPLINE POLICY BASED ON POSITIVE BEHAVIOR SUPPORT THIS SUCCESS HAS POSITIONED CADRE'S GRASSROOTS PARENT LEADERS TO EXERT LEADERSHIP IN BROADER HUMAN RIGHTS/SOCIAL JUSTICE MOVEMENT BUILDING IN MULTIPLE POLICY ARENAS MS CHIN IS A NATIVE CALIFORNIAN AND CHILD OF CHINESE IMMIGRANTS SHE HAS BEEN PART OF THE EDUCATIONAL AND SOCIAL JUSTICE MOVEMENT FOR 16 YEARS, DEDICATED TO FIGHTING INSTITUTIONAL RACISM BY PROTECTING AND TRANSFORMING PUBLIC EDUCATION IN LOW-INCOME NEIGHBORHOODS OF COLOR SHE ALSO HAS 18 YEARS OF EXPERIENCE IN FACILITATION, TRAINING, AND ORGANIZATIONAL DEVELOPMENT MS CHIN HOLDS BOTH A BACHELORS OF ARTS IN HISTORY AND A MASTERS OF ARTS IN URBAN PLANNING - COMMUNITY DEVELOPMENT FROM THE UNIVERSITY OF CALIFORNIA, LOS ANGELES IN ADDITION TO DIRECTING CADRE, MS CHIN IS ALSO AN INDEPENDENT CONSULTANT AND SERVES ON THE BOARD OF DIRECTORS OF JUSTICE MATTERS, A NATIONAL RACIAL JUSTICE POLICY AND RESEARCH ORGANIZATION BASED IN SAN FRANCISCO, CALIFORNIA JACKIE JENKINS-SCOTT ON JULY 1, 2004, JACKIE JENKINS-SCOTT BECAME THE 13TH PRESIDENT OF WHEELOCK COLLEGE, A PRIVATE COLLEGE WITH A MISSION TO IMPROVE THE LIVES OF CHILDREN AND FAMILIES MS JENKINS-SCOTT RECEIVED HER B S DEGREE FROM EASTERN MICHIGAN UNIVERSITY, A MASTERS OF SOCIAL WORK FROM BOSTON UNIVERSITY SCHOOL OF SOCIAL WORK, AND COMPLETED A POST GRADUATE RESEARCH FELLOWSHIP AT RADCLIFFE COLLEGE IN 2003, MS JENKINS-SCOTT RECEIVED AN HONORARY DOCTORATE DEGREE IN EDUCATION FROM WHEELOCK COLLEGE WHEN SHE SERVED AS THE COMMENCEMENT SPEAKER IN ADDITION TO WHEELOCK, SHE HOLDS HONORARY DOCTORATE DEGREES FROM SUFFOLK UNIVERSITY, NORTHEASTERN UNIVERSITY, BENTLEY COLLEGE AND MOUNT IDA COLLEGE FROM 1983 UNTIL 2004, MS JENKINS-SCOTT SERVED AS THE PRESIDENT AND CHIEF EXECUTIVE OFFICER OF THE DIMOCK COMMUNITY HEALTH CENTER IN ROXBURY, MASSACHUSETTS PRIOR TO JOINING DIMOCK, SHE HELD SEVERAL POSITIONS WITH THE COMMONWEALTH OF MASSACHUSETTS, DEPARTMENTS OF PUBLIC AND MENTAL HEALTH AS A COMMUNITY LEADER, PUBLIC HEALTH ADVOCATE AND INNOVATIVE ADMINISTRATOR, SHE HAS BEEN A NATIONALLY KNOWN FIGURE FOR NEARLY THIRTY YEARS MS JENKINS-SCOTT HAS SERVED ON MANY PROFESSIONAL, CIVIC AND COMMUNITY BOARDS AND COMMITTEES SHE CURRENTLY SERVES ON THE BOARD OF DIRECTORS OF THE BOSTON FOUNDATION, THE KENNEDY LIBRARY FOUNDATION AND MUSEUM, THE BOSTON PLAN FOR EXCELLENCE AND WGBH SHE ALSO SERVES ON THE BOARD OF DIRECTORS OF CENTURY BANK AND TRUST COMPANY AND THE TUFTS HEALTH PLAN IN APRIL 2007, BOSTONS MAYOR THOMAS M MENINO SELECTED MS JENKINS-SCOTT TO CO-CHAIR HIS SCHOOL READINESS ACTION PLANNING TEAM, CHARGED WITH DEVELOPING SPECIFIC STRATEGIES TO PREVENT THE ACHIEVEMENT GAP AMONG THE NEXT GENERATION OF STUDENTS MS JENKINS-SCOTT WAS ASKED BY GOVERNOR DEVAL L PATRICK TO CO-CHAIR THE 'READINESS PROJECT,' THE GROUP RESPONSIBLE FOR DEVELOPING A 10-YEAR STRATEGIC PLAN TO IMPLEMENT THE VISION FOR EDUCATION IN THE COMMONWEALTH OF MASSACHUSETTS AS OUTLINED BY GOVERNOR PATRICK IN A JUNE 2007 SPEECH MS JENKINS-SCOTT HAS RECEIVED NUMEROUS AWARDS AND CITATIONS INCLUDING THE 2005 ASSOCIATED INDUSTRIES OF MASSACHUSETTS LEGACY OF LEADERSHIP AWARD, 2004 PINNACLE LIFETIME ACHIEVEMENT AWARD FROM THE GREATER BOSTON CHAMBER OF COMMERCE AND THE 2004 DISTINGUISHED ALUMNI AWARD FROM BOSTON UNIVERSITY IAN INABA IAN INABA IS AN ACCOMPLISHED FILMMAKER, ORGANIZER, AND NEW MEDIA EXPERT AS CO-EXECUTIVE DIRECTOR OF CITIZEN ENGAGEMENT LAB, HE HAS GUIDED THE INCUBATION OF VARIOUS PROJECTS INCLUDING PRESENTE ORG, THE LEADING ONLINE ADVOCACY ORGANIZATION FOCUSED ON THE CONCERNS OF LATINO COMMUNITIES PREVIOUSLY, HE CO-FOUNDED VIDEOTHEVOTE ORG, A NATIONWIDE NETWORK OF CITIZEN JOURNALISTS THAT MONITOR ELECTION IRREGULARITIES AND HAS AIDED THE GROWTH OF COLOROFCHANGE ORG, THE LARGEST ONLINE CONSTITUENCY REPRESENTING THE CONCERNS OF BLACK AMERICA AND GETEQUAL ORG, AN ORGANIZING PROJECT CALLING FOR LGBTQ EQUALITY IAN DIRECTED AND EDITED THE 2006 SUNDANCE AWARD-WINNING DOCUMENTARY AMERICAN BLACKOUT, CHRONICLING VOTER SUPPRESSION HE WROTE, DIRECTED, AND PRODUCED EMINEM'S MUSIC VIDEO "MOSH" WHICH WAS VIEWED OVER 10 MILLION TIMES ONLINE AND NOMINATED FOR AN MTV VIDEO MUSIC AWARD HE ALSO CO-AUTHORED THE BOOK TRUE LIES WHICH WAS PUBLISHED BY PENGUIN/PLUME IAN WAS PREVIOUSLY DIRECTOR OF CORPORATE DEVELOPMENT FOR CHECKPOINT SOFTWARE TECHNOLOGIES (NASD CHKP) AND AN INVESTMENT BANKER WITH ROBERTSON, STEPHENS AND COMPANY HE IS A GRADUATE OF THE WHARTON SCHOOL OF BUSINESS AND THE SCHOOL OF ENGINEERING AND APPLIED SCIENCE AT THE UNIVERSITY OF PENNSYLVANIA DEBORAH LABELLE DEBORAH LABELLE IS AN ATTORNEY, PROFESSOR, WRITER AND ADVOCATE WHO FOCUSES ON THE HUMAN RIGHTS OF PEOPLE IN DETENTION HER HOME BASE IS ANN ARBOR, MICHIGAN, BUT HER ADVOCACY EVIDENCES A COMMITMENT THAT IS DEFINED BY THE HIGHEST PRINCIPLES OF HUMAN RIGHTS THAT TRANSCEND NATIONAL BORDERS SHE HAS BEEN LEAD COUNSEL IN OVER A DOZEN CLASS ACTIONS THAT HAVE SUCCESSFULLY CHALLENGED POLICIES AFFECTING THE TREATMENT OF INCARCERATED MEN, WOMEN AND JUVENILES AND THEIR FAMILIES SHE HAS REPRESENTED CLIENTS BEFORE THE UNITED STATES SUPREME COURT AND IN INTERNATIONAL FORUMS MS LABELLE WAS THE FIRST AMERICAN RECOGNIZED BY HUMAN RIGHTS WATCH AS A HUMAN RIGHTS MONITOR, FOR HER WORK ON BEHALF OF INCARCERATED WOMEN AND GIRLS HER PUBLICATIONS INVOLVING HUMAN RIGHTS OF WOMEN IN DETENTION, INCLUDE WOMEN AT THE MARGINS, NEGLECT, PUNISHMENT AND RESISTANCE (HAWORTH, 2002), ENSURING RIGHTS FOR ALL REALIZING HUMAN RIGHTS FOR PRISONERS IN BRINGING HUMAN RIGHTS HOME (PRAEGER PRESS, 2008), AND BRINGING HUMAN RIGHTS HOME TO THE WORLD OF DETENTION (COLUMBIA HUMAN RIGHTS LAW REVIEW ARTICLE, VOL 40 1, FALL 2008) ATTORNEY LABELLE IS A SENIOR SOROS JUSTICE FELLOW AND, IN ADDITION TO HER PRIVATE PRACTICE, DIRECTOR OF THE AMERICAN CIVIL LIBERTIES UNION'S JUVENILE LIFE WITHOUT PAROLE INITIATIVE MS LABELLE IS A RECIPIENT OF MICHIGAN'S STATE BAR CHAMPION OF JUSTICE AWARD, RECOGNIZED AS ONE OF MICHIGAN'S TOP LAWYERS AND RECEIVED THE NATIONAL TRIAL LAWYER OF THE YEAR AWARD FROM PUBLIC INTEREST (2008) AND NATIONAL LAWYER GUILD, LAW FOR THE PEOPLE (2008) SHE HAS BEEN INTERVIEWED BY TERRY GROSS ON FRESH AIR, NPR RADIO, ON HUMAN RIGHTS, WOMEN'S RIGHTS, APPEARED ON JUSTICE TALKING WITH NPR'S MARGOT ADLER, AND HAS MADE NUMEROUS OTHER BROADCAST MEDIA APPEARANCES ON JUSTICE AND HUMAN RIGHTS ISSUES SHE HAS ALSO RECEIVED THE WADE HAMPTON MCCREE JR AWARD FOR THE ADVANCEMENT OF SOCIAL JUSTICE PRESENTED BY THE FEDERAL BAR (2009) AND THE SUSAN B ANTHONY AWARD FROM THE UNIVERSITY OF MICHIGAN (2010) IN HER MOST RECENT CASE, MS LABELLE REFORMED THE LAW FOR WOMEN IN PRISON TO PREVENT THE RAPE AND ABUSE OF WOMEN IN A PRISON IN MICHIGAN, A CASE THAT PROMPTED THE JURY TO OFFER AN APOLOGY TO THE WOMEN ON BEHALF OF THE PEOPLE OF THE STATE OF MICHIGAN ALVIN LOUIS STARKS ALVIN LOUIS STARKS IS A PROGRESSIVE RACIAL JUSTICE RESEARCHER AND ADVOCATE WHO WORKS IN PHILANTHROPY AND CIVIL RIGHTS ADVOCACY TO ADDRESS ISSUES OF SYSTEMIC INEQUALITY ALVIN'S VISIONARY LEADERSHIP AND INNOVATIVE PHILANTHROPIC RESEARCH SUPPORTS A NEW GENERATION OF IDEAS AND ORGANIZATIONS TO EXPLORE THE INTERSECTIONS OF HUMAN RIGHTS, RACIAL JUSTICE, CROSS MOVEMENT BUILDING AND GENDER EQUITY ALVIN HAS WRITTEN NUMEROUS REPORTS AND STRATEGY PAPERS FOR DONORS AND FOUNDATIONS EXPLORING PROGRESSIVE ACTIVITIES TO STRENGTHEN SOCIAL CHANGE ALVIN HAS AN EXTENSIVE PHILANTHROPIC BACKGROUND THAT HAS GRANTED HIM THE UNIQUE PRIVILEGE TO WORK AT SEVERAL LEADING FOUNDATIONS FOR OVER EIGHT YEARS, ALVIN WORKED AT THE OPEN SOCIETY INSTITUTE AND IN 2004 CREATED AND DIRECTED THE OPEN SOCIETY INSTITUTE'S RACIAL JUSTICE INITIATIVE BEFORE JOINING OSI, ALVIN HELD THE POSITION OF SENIOR PROGRAM OFFICER FOR RACIAL JUSTICE AND GENDER IDENTITY AT THE ARCUS FOUNDATION THERE HIS WORK FOCUSED ON BUILDING THE FOUNDATION'S MISSION TO ADVANCE THE INTERSECTIONS OF RACE, SEXUALITY AND GENDER IDENTITY IN LATE 2009, ALVIN BEGAN WORK WITH THE NATIONAL NAACP TO ENCOURAGE NEW PROGRESSIVE ADVOCACY AND BUILD PHILANTHROPIC ENGAGEMENT ALVIN RECEIVED HIS FORMAL EDUCATION FROM THE STATE UNIVERSITY OF NEW YORK AND COLUMBIA UNIVERSITY IN NEW YORK CITY HE SITS ON SEVERAL NON-PROFIT BOARDS

SCHEDULE A, PART IV, SUPPLEMENTAL INFORMATION DR ANTONIA DARDER IS AN INTERNATIONALLY RECOGNIZED CRITICAL SCHOLAR SHE HOLDS THE LEAVEY PRESIDENTIAL CHAIR OF ETHICS AND MORAL LEADERSHIP AT LOYOLA MARYMOUNT UNIVERSITY, LOS ANGELES AND IS PROFESSOR EMERITA OF EDUCATION POLICY, ORGANIZATION AND LEADERSHIP AT THE UNIVERSITY OF ILLINOIS URBANA CHAMPAIGN HER SCHOLARSHIP FOCUSES ON ISSUES OF RACISM, POLITICAL ECONOMY, EDUCATION, SOCIAL JUSTICE, AND SOCIETY ANTONIA IS THE AUTHOR OF CULTURE AND POWER IN THE CLASSROOM AND REINVENTING PAULO FREIRE A PEDAGOGY OF LOVE, NAMED OUTSTANDING BOOK IN CURRICULUM FOR 2001-2002 BY THE AMERICAN EDUCATIONAL RESEARCH ASSOCIATION SHE IS ALSO CO-AUTHOR OF AFTER RACE RACISM AFTER MULTICULTURALISM SHE IS THE EDITOR OF CULTURE AND DIFFERENCE AND CO-EDITOR OF LATINOS AND EDUCATION, THE LATINO STUDIES READER CULTURE, ECONOMY AND SOCIETY, AND THE CRITICAL PEDAGOGY READER, CONSIDERED A PREMIER TEXT FOR ITS USE IN FOUNDATIONS COURSES THIS YEAR, THE 20TH ANNIVERSARY EDITION OF CULTURE AND POWER IN THE CLASSROOM WAS RELEASED, AS WELL AS A DISSIDENT VOICE ESSAY ON CULTURE, PEDAGOGY, AND POWER, A TWENTY-YEAR RETROSPECTIVE OF HER WRITINGS, WHICH INCLUDES HER POETRY BEYOND HER SCHOLARLY EFFORTS, ANTONIA IS AN ACTIVIST AND VISUAL ARTIST, WHO HAS PARTICIPATED IN A VARIETY OF GRASSROOTS EFFORTS TIED TO EDUCATIONAL RIGHTS, WORKER'S RIGHTS, BILINGUAL EDUCATION, WOMEN'S ISSUES, ENVIRONMENTAL JUSTICE, AND IMMIGRANT RIGHTS IN THE 1990S, SHE CONVENED EDUCATORS FROM ACROSS THE STATE TO ESTABLISH THE CALIFORNIA CONSORTIUM OF CRITICAL EDUCATORS (CCCE), A MEMBER SUPPORTED RADICAL TEACHERS' ORGANIZATION COMMITTED TO AN EDUCATIONAL VISION OF SCHOOLING INTIMATELY LINKED TO SOCIAL JUSTICE, HUMAN RIGHTS, AND ECONOMIC DEMOCRACY IN 2005, SHE ESTABLISHED A RADIO COLLECTIVE WITH STUDENTS AND COMMUNITY MEMBERS WHO PRODUCED LIBERACION!, A PUBLIC AFFAIRS RADIO PROGRAM ON WEFT AS A MEMBER OF THE CHAMPAIGN URBANA INDEPENDENT MEDIA CENTER, SHE WAS ACTIVE AS A COMMUNITY JOURNALIST WITH THE PUBLIC I IN 2007, SHE WORKED WITH GRADUATE STUDENTS ON AN AWARD WINNING DOCUMENTARY, BREAKING SILENCE THE PERVASIVENESS OF OPPRESSION THAT EXAMINED THE PERSISTENCE OF INEQUALITY AT THE UNIVERSITY ANTONIA WAS BORN IN PUERTO RICO AND RAISED IN EAST LOS ANGELES AS A YOUNG SINGLE MOTHER OF THREE CHILDREN AND LIVING ON WELFARE, SHE COMPLETED HER STUDIES IN NURSING AT PASADENA CITY COLLEGE SHE ATTENDED CALIFORNIA STATE UNIVERSITY LOS ANGELES AND THEN PACIFIC OAKS COLLEGE WHERE SHE STUDIED HUMAN DEVELOPMENT WITH A FOCUS ON MARRIAGE AND FAMILY THERAPY SHE EARNED HER DOCTORAL DEGREE IN PHILOSOPHY OF EDUCATION FROM CLAREMONT GRADUATE UNIVERSITY ANTONIA'S SCHOLARSHIP HAS BEEN DEEPLY INFLUENCED BY HER ACQUAINTANCE WITH RENOWNED BRAZILIAN EDUCATOR PAULO FREIRE, WHOSE IDEAS ON SCHOOLING AND SOCIETY PROFOUNDLY SHAPED THE DIRECTION OF HER EARLY WORK TODAY, ANTONIA IS MOTIVATED TO PERSIST IN THE STRUGGLE FOR UNIVERSAL HUMAN RIGHTS BY HER FOUR GRANDDAUGHTERS AND THE OTHER CHILDREN OF OUR TIME, WHO WILL BE FORCED TO CONTEND WITH WORLD WE WILL LEAVE BEHIND

SCHEDULE A, PART IV, SUPPLEMENTAL INFORMATION 4 PUBLIC PARTICIPATION IN PROGRAMS OR POLICIES TREAS REG 1 170A-9(F)(3)(VI) BY DISSEMINATING ITS RESEARCH THROUGH PUBLICATIONS AND CONFERENCES, THE SCHOTT FOUNDATION SHARES ITS SCHOLARSHIP AND POLICY RECOMMENDATIONS REGARDING PUBLIC EDUCATION IN THIS COUNTRY IN THE HOPE OF CLOSING THE OPPORTUNITY GAP TO ENSURE THAT ALL CHILDREN HAVE EQUAL ACCESS TO A HIGH QUALITY PRE-K THROUGH 12TH GRADE EDUCATION TREAS REG 1 170A-9(F)(3)(VI)(B) PROVIDES THAT "AN ORGANIZATION [THAT] IS AN EDUCATIONAL OR RESEARCH INSTITUTION WHICH REGULARLY PUBLISHES SCHOLARLY STUDIES THAT ARE WIDELY USED BY COLLEGES AND UNIVERSITIES OR BY MEMBERS OF THE GENERAL PUBLIC WILL ALSO BE CONSIDERED EVIDENCE THAT SUCH ORGANIZATION IS "PUBLICLY SUPPORTED " FURTHERMORE, TREAS REG 1 170A-9(F)(3)(VI)(C) PROVIDES THAT "THE PARTICIPATION IN, OR SPONSORSHIP OF, THE PROGRAMS OF THE ORGANIZATION BY MEMBERS OF THE PUBLIC HAVING SPECIAL KNOWELDGE OR EXPERTISE, PUBLIC OFFICEALS, OR CIVIC OR COMMUNITY LEADERS" WILL BE CONSIDERED EVIDENCE THAT AN ORGANIZATION IS "PUBLICALY SUPPORTED " THE FOUNDATION CLEARLY MEETS BOTH OF THESE STANDARDS FOR EXAMPLE, FROM NOVEMBER 5-7, 2009, THE FOUNDATION HOSTED ITS 2ND ANNUAL OPPORTUNITY TO LEARN SUMMIT, ENTITLTED "BUILDING A NATIONAL MOVEMENT TO CLOSE THE OPPORTUNITY GAP " THE SUMMIT WAS DESIGNED TO PROVIDE A PLATFORM FOR PHILANTHROPIC PARTNERS, GRASSROOTS COMMUNITY ADVOCATES, FEDERAL AND STATE POLICYMAKERS, YOUTH ORGANIZERS AND RESEARCHERS TO SHARE CRITICAL ADVOCACY STRATEGIES, FUNDING APPROACHES AND NETWORKS TO BUILD A STATE AND NATIONAL MOVEMENT TO PROVIDE ALL STUDENTS AN OPPORTUNITY TO LEARN FEATURED SPEAKERS INCLUDED GOVERNMENT OFFICIALS (RUSSLYN ALI, ASSISTANT SECRETARY FOR CIVIL RIGHTS, US DEPARTMENT OF EDUCATION, CONGRESSMAN CHAKA FATTAH, US HOUSE OF REPRESENTATIVES), PROMINENT COMMUNITY LEADERS (STEPHANIE ELAM, ANCHOR, CNN, CHARLES OGLETREE, HARVARD LAW SCHOOL PROFESSOR OF LAW), LEADERS IN THE PHILANTHROPIC COMMUNITY (GAIL CHRISTOPHER, VICE PRESIDENT FOR PROGRAMS, WK KELLOGG FOUNDATION, DR FRED FRELOW, EDUCATION AND SCHOLARSHIP PROGRAM OFFICER, FORD FOUNDATION) AND EDUCATION LEADERS (DR LINDA DARLING HAMMOND, PROFESSOR OF EDUCATION, STANFORD UNIVERSITY, JOHN STOCKS, DEPUTY EXECUTIVE DIRECTOR, NATIONAL EDUCATION ASSOCIATION) A REVIEW OF THE FOUNDATION'S WEBSITE REVEALS NUMEROUS PUBLICATIONS AND REPORTS, AVAILABLE IN PDF FORMAT FOR ANY INTERESTED READER TO DOWNLOAD, IN THE FOLLOWING CATEGORIES * OPPORTUNITY TO LEARN (E G , LOST OPPORTUNITY A 50-STATE REPORT ON THE OPPORTUNITY TO LEARN IN AMERICA, PUBLISHED IN MAY 2009) * A POSITIVE FUTURE FOR BLACK BOYS (E G , GIVEN HALF A CHANCE THE SCHOTT 50 STATE REPORT ON PUBLIC EDUCATION FOR BLACK MALES, PUBLISHED IN JULY 2008) * THE SCHOTT FELLOWSHIP ON EARLY CARE AND EDUCATION (E G , ENSURING HIGH QUALITY EARLY EDUCATION FOR ALL CHILDREN IN THE COMMONWEALTH OF MASSACHUSETTS, PUBLISHED IN JUNE 2005) * PUBLIC POLICY AND LEADERSHIP (E G , PEER-LED PROFESSIONAL DEVELOPMENT FOR EQUITY AND DIVERSITY A REPORT FOR TEACHERS AND ADMINISTRATORS BASED ON FINDINGS FROM THE SEED PROJECT, PUBLISHED IN MAY 2007) * GENDER EQUITY (E G , KEEPING SCORE GIRLS' PARTICIPATION IN HIGH SCHOOL ATHLETICS IN MASSACHUSETTS, PUBLISHED IN FEBRUARY 2004) THE FOUNDATION ALSO SERVES ITS MISSION BY MAKING GRANTS TO PUBLIC CHARITIES THAT PROMOTE EQUITY IN EDUCATION RECENT GRANTEES INCLUDE THE DONOR'S EDUCATION COLLABORATIVE (DEC) IS A JOINT GRANTMAKING EFFORT THAT SUPPORTS COMMUNITY ENGAGEMENT AROUND KEY POLICY REFORMS TO ATTAIN AN EQUITABLE NEW YORK CITY PUBLIC SCHOOL SYSTEM AND MAKE IT RESPONSIVE TO THE NEEDS OF ALL CHILDREN THIS GRANT PROVIDES FUNDS TO DEC TO CONTINUE ITS GRANTMAKING OPERATIONS TO SUPPORT ORGANIZATIONS THAT USE CONSTITUENCY BUILDING AND RESEARCH TO ADVOCATE FOR SYSTEMIC CHANGES THAT IMPROVE TEACHING EFFECTIVENESS, INCREASE COLLEGE READINESS, AND SUPPORT THE DEVELOPMENT OF A LEARNING COMMUNITY RURAL COMMUNITY ALLIANCE (RCA) IS A MEMBERSHIP BASED ORGANIZATION OF PARENTS, COMMUNITY MEMBERS, YOUTH, EDUCATORS, LOCAL BUSINESS OWNERS, LOCAL ELECTED OFFICIALS, AND STATE POLICY MAKERS OPERATING IN RURAL ARKANSAS THE COMMON PURPOSE OF MEMBERS IS TO CREATE A PROSPEROUS FUTURE FOR RURAL AND COMMUNITY SCHOOLS BY INCREASING THEIR ABILITY TO ADVOCATE, THEIR AWARENESS ON THE IMPORTANCE OF RURAL SCHOOLS, AND HELPING THEM TO UNITE THEIR VOICES ON STATE-WIDE INITIATIVES MASSACHUSETTS BUDGET AND POLICY CENTER (MBPC) IS AN ORGANIZATION THAT ANALYZES BUDGETS AND TAXES FROM A PROGRESSIVE PERSPECTIVE MBPC PROVIDES TO THE PUBLIC, GRASSROOTS, AND ADVOCACY GROUPS HELPFUL INFORMATION AND ANALYSIS OF STATE ECONOMIC POLICIES AND HELPS ENSURE THAT THE IMPACT OF POLICY CHOICES ON LOW AND MODERATE INCOME RESIDENTS IS FRONT AND CENTER IN THE PUBLIC DEBATE THIS GRANT SUPPORTS THE CREATION OF A MEMO ON OPTIONS TO GENERATE REVENUE FOR BUILDING EDUCATIONAL SYSTEMS THAT PROVIDE EVERY CHILD WITH A MEANINGFUL OPPORTUNITY TO LEARN

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493059005113

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527
▶ Complete if the organization is described below.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047
2011
Open to Public Inspection

If the organization answered "Yes," to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then
- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered "Yes," to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then
- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes," to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, line 35c (Proxy Tax), then
- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization	Employer identification number
THE SCHOTT FDTN FOR PUBLIC EDUCATION	04-3457065

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1 Provide a description of the organization's direct and indirect political campaign activities on behalf of or in opposition to candidates for public office in Part IV

2 Political expenditures ▶ $

3 Volunteer hours

Part I-B Complete if the organization is exempt under section 501(c)(3).

1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ $

2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ $

3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No

4a Was a correction made? ☐ Yes ☐ No

b If "Yes," describe in Part IV

Part I-C Complete if the organization is exempt under section 501(c) except section 501(c)(3).

1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ $

2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt funtion activities ▶ $

3 Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b ▶ $

4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No

5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

(a) Name	**(b)** Address	**(c)** EIN	**(d)** Amount paid from filing organization's funds If none, enter -0-	**(e)** Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-

Part II-A **Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

A Check ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)

B Check ☐ if the filing organization checked box A and "limited control" provisions apply

	Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	**(a)** Filing Organization's Totals	**(b)** Affiliated Group Totals
1a	Total lobbying expenditures to influence public opinion (grass roots lobbying)	40,000	
b	Total lobbying expenditures to influence a legislative body (direct lobbying)	35,000	
c	Total lobbying expenditures (add lines 1a and 1b)	75,000	
d	Other exempt purpose expenditures	4,822,553	
e	Total exempt purpose expenditures (add lines 1c and 1d)	4,897,553	
f	Lobbying nontaxable amount Enter the amount from the following table in both columns	394,878	

If the amount on line 1e, column (a) or (b) is:	**The lobbying nontaxable amount is:**
Not over $500,000	20% of the amount on line 1e
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000
Over $17,000,000	$1,000,000

		(a)	(b)
g	Grassroots nontaxable amount (enter 25% of line 1f)	98,720	
h	Subtract line 1g from line 1a If zero or less, enter -0-	0	
i	Subtract line 1f from line 1c If zero or less, enter -0-	0	
j	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?	☐ **Yes** ☐ **No**	

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period

	Calendar year (or fiscal year beginning in)	**(a)** 2008	**(b)** 2009	**(c)** 2010	**(d)** 2011	**(e)** Total
2a	Lobbying non-taxable amount	362,158	372,170	357,387	394,878	1,486,593
b	Lobbying ceiling amount (150% of line 2a, column(e))					2,229,890
c	Total lobbying expenditures	55,000		105,000	75,000	235,000
d	Grassroots non-taxable amount	90,540	93,043	89,347	98,720	371,650
e	Grassroots ceiling amount (150% of line 2d, column (e))					557,475
f	Grassroots lobbying expenditures			40,000	40,000	80,000

Part II-B **Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

		(a) Yes	(a) No	(b) Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
a	Volunteers?			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			
i	Other activities? If "Yes," describe in Part IV			
j	Total lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b	If "Yes," enter the amount of any tax incurred under section 4912			
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

			Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1		
2	Did the organization make only in-house lobbying expenditures of $2,000 or less?	2		
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?	3		

Part III-B **Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes".**

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) non-deductible lobbying and political expenditures **(do not include amounts of political expenses for which the section 527(f) tax was paid).**		
a	Current year	2a	
b	Carryover from last year	2b	
c	Total	2c	
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV **Supplemental Information**

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i Also, complete this part for any additional information

Identifier	Return Reference	Explanation

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, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047
2011
Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

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? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may 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 ☐ Yes ☐ 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 importantly land area
- ☐ Protection of natural habitat
- ☐ Preservation of a certified historic structure
- ☐ Preservation of open space

2 Complete lines 2a–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 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 taxable 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 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 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 the 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
c Beginning balance	1c	
d Additions during the year	1d	
e Distributions during the year	1e	
f Ending balance	1f	

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	1,061,270	843,591	1,056,647	1,254,137	
b Contributions	5,000,000				
c Investment earnings or losses	374,275	217,679	136,944	-197,490	
d Grants or scholarships					
e Other expenditures for facilities and programs			350,000		
f Administrative expenses					
g End of year balance	6,435,545	1,061,270	843,591	1,056,647	

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

a Board designated or quasi-endowment ▶ 20 200 %

b Permanent endowment ▶

c Term endowment ▶ 79 800 %

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

		Yes	No
(i) unrelated organizations	3a(i)		No
(ii) related organizations	3a(ii)		No
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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

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

Description of property	(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		109,996	46,565	63,431
e Other				
Total. Add lines 1a-1e *(Column (d) should equal Form 990, Part X, column (B), line 10(c).)* ▶				63,431

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
Other		
Total. *(Column (b) should equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. *(Column (b) should equal Form 990, Part X, col (B) line 13)* ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
Total. *(Column (b) should equal Form 990, Part X, col.(B) line 15.)* . . . . ▶	

Part X Other Liabilities. See Form 990, Part X, line 25.

1 (a) Description of Liability	(b) Amount
Federal Income Taxes	
Total. *(Column (b) should equal Form 990, Part X, col (B) line 25)* ▶	

2. Fin 48 (ASC 740) Footnote In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC740)

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

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	2,976,031
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	5,000,799
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	-2,024,768
4	Net unrealized gains (losses) on investments	4	305,157
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 - 8	9	305,157
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-1,719,611

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	3,267,088
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains on investments	2a	305,157		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIV)	2d	21,088		
e	Add lines **2a** through **2d**			2e	326,245
3	Subtract line **2e** from line **1**			3	2,940,843
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	35,188		
b	Other (Describe in Part XIV)	4b			
c	Add lines **4a** and **4b**			4c	35,188
5	Total Revenue Add lines **3** and **4c.** (This should equal Form 990, Part I, line 12)			5	2,976,031

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

1	Total expenses and losses per audited financial statements			1	4,986,699
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	21,088		
e	Add lines **2a** through **2d**			2e	21,088
3	Subtract line **2e** from line **1**			3	4,965,611
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	35,188		
b	Other (Describe in Part XIV)	4b			
c	Add lines **4a** and **4b**			4c	35,188
5	Total expenses Add lines **3** and **4c.** (This should equal Form 990, Part I, line 18)			5	5,000,799

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, 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

Identifier	Return Reference	Explanation
DESCRIPTION OF INTENDED USE OF ENDOWMENT FUNDS	PART V, LINE 4	THE SCHOTT FOUNDATION ENDOWMENT WAS CREATED TO PROVIDE LONG-TERM FINANCIAL SUPPORT FOR THE SCHOTT FOUNDATION ACCORDINGLY, THESE FUNDS ARE MANAGED WITH DISCIPLINED LONGER-TERM INVESTMENT OBJECTIVES AND STRATEGIES DESIGNED TO MEET CASH FLOWS AND SPENDING REQUIREMENTS MANAGEMENT OF THE ASSETS IS DESIGNED TO ATTAIN THE MAXIMUM TOTAL RETURN CONSISTENT WITH ACCEPTABLE AND AGREED UPON LEVELS OF RISK IT IS THE GOAL OF THE AGGREGATE LONG-TERM INVESTMENTS TO GENERATE AN AVERAGE TOTAL ANNUAL RETURN THAT EXCEEDS THE SPENDING/PAYOUT RATE PLUS INFLATION
DESCRIPTION OF UNCERTAIN TAX POSITIONS UNDER FIN 48	PART X	THE FOUNDATION ACCOUNTS FOR THE EFFECT OF ANY UNCERTAIN TAX POSITIONS BASED ON A "MORE LIKELY THAN NOT" THRESHOLD TO THE RECOGNITION OF THE TAX POSITIONS BEING SUSTAINED BASED ON THE TECHNICAL MERITS OF THE POSITION UNDER SCRUTINY BY THE APPLICABLE TAXING AUTHORITY IF A TAX POSITION OR POSITIONS ARE DEEMED TO RESULT IN UNCERTAINTIES OF THOSE POSITIONS, THE UNRECOGNIZED TAX BENEFIT IS ESTIMATED BASED ON A "CUMULATIVE PROBABILITY ASSESSMENT" THAT AGGREGATES THE ESTIMATED TAX LIABILITY FOR ALL UNCERTAIN TAX POSITIONS THE FOUNDATION HAS IDENTIFIED ITS TAX STATUS AS A TAX-EXEMPT ENTITY AS ITS ONLY SIGNIFICANT TAX POSITION HOWEVER, THE FOUNDATION HAS DETERMINED THAT SUCH TAX POSITION DOES NOT RESULT IN AN UNCERTAINTY REQUIRING RECOGNITION THE FOUNDATION IS NOT CURRENTLY UNDER EXAMINATION BY ANY TAXING JURISDICTION ITS FEDERAL AND STATE INCOME TAX RETURNS ARE GENERALLY OPEN FOR EXAMINATION FOR THE PAST 3 YEARS
PART XII, LINE 2D - OTHER ADJUSTMENTS		FUNDRAISING EVENTS 21,088
PART XIII, LINE 2D - OTHER ADJUSTMENTS		FUNDRAISING EVENTS 21,088

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493059005113

SCHEDULE G (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

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

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

a ☐ Mail solicitations
b ☐ Internet and e-mail solicitations
c ☐ Phone solicitations
d ☐ In-person solicitations
e ☐ Solicitation of non-government grants
f ☐ Solicitation of government grants
g ☐ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☐ Yes ☐ No

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

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

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

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.

			(a) Event #1 HOT SCHOTT AWARD GALA (event type)	(b) Event #2 (event type)	(c) Other Events (total number)	(d) Total Events (Add col (a) through col (c))
Revenue	1	Gross receipts	74,673			74,673
	2	Less Charitable contributions				
	3	Gross income (line 1 minus line 2)	74,673			74,673
Direct Expenses	4	Cash prizes				
	5	Non-cash prizes	2,540			2,540
	6	Rent/facility costs	2,059			2,059
	7	Food and beverages	8,546			8,546
	8	Entertainment	2,508			2,508
	9	Other direct expenses	5,435			5,435
	10	Direct expense summary Add lines 4 through 9 in column (d) ▶				(21,088)
	11	Net income summary Combine lines 3 and 10 in column (d) ▶				53,585

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.

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

9 Enter the state(s) in which the organization operates gaming activities ____________

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," Explain ____________

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," Explain ____________

11 Does the organization operate gaming activities with nonmembers? . . . . Yes No

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? . . . . Yes No

13 Indicate the percentage of gaming activity operated in

a The organization's facility	**13a**	
b An outside facility	**13b**	

14 Provide the name and address of the person who prepares the organization's gaming/special events books and records

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? . . . . Yes No

b If "Yes," enter the amount of gaming revenue received by the organization ▶ $ __________ and the amount of gaming revenue retained by the third party ▶ $ __________

c If "Yes," enter name and address

Name ▶

Address ▶

16 Gaming manager information

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

Director/officer Employee Independent contractor

17 Mandatory distributions

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? . . . . Yes No

b Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ $

Part IV Complete this part to provide additional information for responses to quuestion on Schedule G (see instructions.)

Identifier	ReturnReference	Explanation

Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

Grants and Other Assistance to Organizations, Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . ☑ **Yes** ☐ **No**

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Governments and Organizations in the United States.

Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than $5,000. Check this box if no one recipient received more than $5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed . . . ▶ ☐

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . ▶ 42

3 Enter total number of other organizations listed in the line 1 table . . . ▶ 2

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 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

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

Identifier	Return Reference	Explanation
PROCEDURE FOR MONITORING GRANTS IN THE U S	PART I, LINE 2	SCHEDULE I, PART I, LINE 2 THE ORGANIZATION ADHERES TO A STRICT POLICY FOR MONITORING THE USE OF GRANT FUNDS IN THE UNITED STATES BY (1) ENABLING IT TO RETAIN CONTROL AND DISCRETION AS TO THE USE OF THE FUNDS, (2) MAINTAINING RECORDS THAT ESTABLISH THAT THE FUNDS WERE USED FOR EXEMPT PURPOSES, AND (3) LIMITING THE DISTRIBUTION OF FUNDS TO SPECIFIC PROJECTS THAT ARE IN FURTHERANCE OF ITS OWN EXEMPT PURPOSE IN ADDITION, EACH POTENTIAL GRANTEE MUST SUBMIT A GRANT PROPOSAL TO THE ORGANIZATION WHICH OUTLINES THE GRANT AMOUNT REQUESTED AND THE PURPOSE OF THE GRANT THE ORGANIZATION WILL THEN CONDUCT A PRE-GRANT INQUIRY WHICH ADDRESSES THE FOLLOWING (1) THE IDENTIFY, PRIOR HISTORY, AND EXPERIENCE OF THE GRANTEE ORGANIZATION AND ITS MANAGERS, (2) WHETHER THE GRANTEE HAS A HISTORY OF COMPLIANCE WITH THE TERMS OF PREVIOUS GRANTS, (3) THE CURRENT PROJECT, AND THE CONNECTION TO THE ORGANIZATION'S MISSION AFTER THE GRANT HAS BEEN APPROVED, A GRANT AWARD LETTER IS SENT TO THE GRANTEE DISCUSSING THE TERMS OF THE GRANT THIS LETTER REQUIRES THE GRANTEE TO FURNISH THE GRANTOR WITH A REPORT ON THE USE OF THE FUNDS AND THE PROGRESS MADE IN ACCOMPLISHING THE PURPOSE OF THE GRANT

Additional Data

Return to Form

Software ID:
Software Version:
EIN: 04-3457065
Name: THE SCHOTT FDTN FOR PUBLIC EDUCATION

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
AFRICAN AMERICAN POLICY FORUM 435 W 116TH ST ROOM 827 NEW YORK, NY 10027	06-1597874	501(C)(3)	12,000				ADVANCE RACE AND GENDER EQUITY IN THE U S AND INTERNATIONALLY
ALLIANCE FOR QUALITY EDUCATION94 CENTRAL AVE ALBANY, NY 12206	22-3810450	501(C)(4)	85,000				IMPROVE NY PUBLIC EDUCATION

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
APPLIED RESEARCH CENTER32 BROADWAY SUITE 1801 NEW YORK,NY 10004	94-2759879	501(C)(3)	52,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN & BOARD DISCRETIONARY GRANT
ARKANSAS ADVOCATES FOR CHILDREN & FAMILIESUNION STATION SUITE 306 1400 WMARKHAM LITTLE ROCK,AR 72201	71-0492205	501(C)(3)	50,000				CRITICAL PARTNER IN THE ARKANSAS OPPORTUNITY TO LEARN CAMPAIGN

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ARKANSAS PUBLIC POLICY PANEL1308 WEST 2ND STREET LITTLE ROCK,AR 72201	71-0467088	501(C)(3)	115,000				DEVELOP OPPORTUNITY TO LEARN CAMPAIGN IN ARKANSAS
ASSOCIATION OF BLACK FOUNDATION EXECUTIVES333 7TH AVENUE 13TH FLOOR NEW YORK,NY 10001	23-7156531	501(C)(3)	5,000				ANNUAL MEMBERSHIP SUPPORT

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
BOSTON WOMENS FUND 14 BEACON STREET SUITE 805 BOSTON, MA 02108	22-2475551	501(C)(3)	5,000				SUPPORT THE WOMEN'S PIPELINE FOR CHANGE
CITIZENS FOR PUBLIC SCHOOLS18 TREMONT STREET SUITE 320 BOSTON, MA 02108	04-3561381	501(C)(3)	6,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN MASSACHUSETTS

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
COALITION AGAINST POVERTY 105 WILLIAM STREET ROOM 26 NEW BEDFORD,MA 02470	04-3351827	501(C)(3)	5,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN MASSACHUSETTS
COMMUNITY ASSET DEVELOPMENT REDEFINING EDUCATION8510 1/2 SOUTH BROADWAY LOS ANGELES,CA 90003	26-4753821	501(C)(3)	5,500				BOARD DISCRETIONARY GRANT & 10TH ANNIVERSARY SPONSORSHIP

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
COMMUNITY FUNDS INC909 THIRD AVENUE 22ND FLOOR NEW YORK, NY 10022	13-3062214	501(C)(3)	340,000				PROMOTE PUBLIC ENGAGEMENT IN SYSTEMIC PUBLIC SCHOOL REFORM IN NYC
ECONOMIC POLICY INSTITUTE 1333 H STREET NW EAST TOWER WASHINGTON, DC 20005	52-1368964	501(C)(3)	25,000				LINK EARLY CHILDHOOD TO BROADER EDUCATION POLICY AND RAISE THE VISIBILITY OF A COMPREHENSIVE VIEW OF EARLY CHILDHOOD CARE AND EDUCATION

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
EDUCATION LAW CENTER - PA429 FOURTH AVE SUITE 702 PITTSBURGH,PA 15219	23-2581102	501(C)(3)	10,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN PENNSYLVANIA, CONVENE OPPORTUNITY TO LEARN PENNSYLVANIA SUMMIT
FAMILIES AND FRIENDS OF LOUISIANA'S INCARCERATED CHILDREN1600 ORETHA CASTLE HALEY BOULEVARD NEW ORLEANS,LA 70113	20-5924561	501(C)(3)	5,000				SUPPORT BUILDING OPPORTUNITY TO LEARN IN LOUISIANA

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
FJC520 8TH AVENUE 20TH FLOOR NEW YORK, NY 10018	13-3848582	501(C)(3)	6,000				IMPROVE THE JUVENILE JUSTICE SYSTEM IN NEW YORK AND OUTCOMES FOR JUSTICE-INVOLVED YOUTH
FUND FOR THE CITY OF NEW YORK INC121 6TH AVENUE NEW YORK, NY 10013	13-2612524	501(C)(3)	100,000				ORGANIZE, RESEARCH, AND DESIGN A BLUEPRINT FOR RAISING EDUCATIONAL OUTCOMES FOR THE STUDENTS OF BROOKLYN COMMUNITY SCHOOL DISTRICT 16

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
GIRLS FOR GENDER EQUITY30 THIRD AVE SUITE 104 BROOKLYN,NY 11217	04-3697166	501(C)(3)	30,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN-GIRLS' EQUITY
INSTITUTE FOR WISCONSIN'S FUTURE325 W SILVER SPRINGS DRIVE GLENDALE,WI 53217	39-1805801	501(C)(3)	50,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
MASSACHUSETTS BUDGET & POLICY CENTER15 COURT SQUARE SUITE 700 BOSTON,MA 02108	04-2967537	501(C)(3)	50,000				RESEARCH & ANALYSIS OF BUDGET & TAX POLICIES NATIONALLY
MOVEMENT STRATEGY CENTER 436 14TH STREET 5TH FLOOR OAKLAND,CA 94612	20-1037643	501(C)(3)	75,000				SUPPORT ALLIANCE EDUCATION JUSTICE WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
NATIONAL WOMEN'S LAW CENTER11 DUPONT CIRCLE NW SUITE 800 WASHINGTON, DC 20036	52-1213010	501(C)(3)	33,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN - GIRLS' EQUITY
NATIONAL ECONOMIC & SOCIAL RIGHTS INITIATIVE90 JOHN STREET STE 308 NEW YORK, NY 10038	73-1714118	501(C)(3)	100,000				ENABLE GREATER INVOLVEMENT OF PUBLIC SCHOOL PARENTS FROM COMMUNITIES HIGHLY IMPACTED BY THE OVER-POLICING OF LOW-INCOME BLACK AND LATINO YOUTH AND ADULTS

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
NEIGHBOR TO NEIGHBOR MASSACHUSETTS 262 WASHINGTON STREET 3RD FLOOR BOSTON,MA 02108	04-3507716	501(C)(3)	30,000				SUPPORT MASSACHUSETTS OPPORTUNITY TO LEARN CAMPAIGN
NEW ORGANIZING INSTITUTE EDUCATION FUND 1133 19TH STREET NW STE 850 WASHINGTON,DC 20036	56-2633160	501(C)(3)	5,000				BOARD DISCRETIONARY GRANT

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
NEW SETTLEMENT APARTMENTS1512 TOWNSEND AVENUE BRONX,NY 10452	14-1719016	501(C)(3)	25,000				ELEVATE PARENTS' VOICES & COMPACITY TO ADVOCATE OPPORTUNITY TO LEARN AGENDA
ONE VOICE MISSISSIPPI1072 W LYNCH STREET JACKSON,MS 39203	02-0787550	501(C)(3)	50,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN MISSISSIPPI CAMPAIGN

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
ORGANIZING AND LEADERSHIP TRAINING CENTER 1803 DORCHESTER AVENUE BOSTON, MA 02124	04-2863903	501(C)(3)	10,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN MASSACHUSETTS
ORLEANS PUBLIC EDUCATION NETWORK200 S BROAD STREET SUITE 7 NEW ORLEANS, LA 70119	80-0378257	501(C)(3)	10,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN SOUTHERN STATES

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
PHILADELPHIA STUDENT UNION 4205 CHESNUT STREET 3RD FLOOR PHILADELPHIA,PA 19104	23-2815998	501(C)(3)	5,000				BOARD DISCRETIONARY GRANT
PUBLIC INTEREST PROJECTS45 W 36TH STREET 6TH FL NEW YORK,NY 10018	13-3191113	501(C)(3)	73,000				BUILDING PUBLIC WILL FOR EDUCATION REFORM, PARTICIPATE IN THE DONOR COLLABORATIVE

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
PUBLIC POLICY AND EDUCATION FUND94 CENTRAL AVE ALBANY,NY 12206	13-3364209	501(C)(3)	30,000				INITIATIVE ON EARLY CHILDHOOD EDUCATION
PUSH FOR EXCELLENCE930 E50TH STREET CHICAGO,IL 60615	34-1230337	501(C)(3)	15,000				BUILD PUBLIC AND POLITICAL WILL AROUND THE INTERCONNECTION BETWEEN ACADEMIC ACHIEVEMENT AND CURRENT ZERO-TOLERANCE POLICIES

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
RURAL COMMUNITY ALLIANCE633 HIGHWAY 9 FOX,AR 72051	25-1919387	501(C)(3)	55,000				BUILD AN OPPORTUNITY TO LEARN AGENDA IN ARKANSAS
SOUTHERN EDUCATION FUND 135 AUBURN AVE NE 2ND FL ATLANTA,GA 30303	13-5562388	501(C)(3)	50,000				SUPPORT EARLY EDUCATION WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
STONE LANTERN FILMS28 HILLSIDE AVENUE SUFFERN, NY 10901	52-1486485	501(C)(3)	5,000				SUPPORT THE RESEARCH AND DEVELOPMENT PHASE OF THE FILM "REFORM"
STUDENT ADVOCACY CENTER OF MICHIGAN1921 WEST MICHIGAN AVE YPSILANTI, MI 48197	38-2058667	501(C)(3)	5,000				BOARD DISCRETIONARY GRANT

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
STANFORD UNIVERSITY SCHOOL OF EDUCATION520 GALVEZ MALL CERAS 325 STANFORD,CA 94305	94-1156365	501(C)(3)	50,000				GRANT TO THE STANDFORD CENTER FOR OPPORTUNITY POLICY IN EDUCATION FOR THE OPPORTUNITY TO LEARN CAMPAIGN
THE HATCHER GROUP4340 EAST WEST HIGHWAY SUITE 912 BETHESDA,MD 20814	20-0602831	N/A	203,128				EDUCATION MEDIA SERVICES

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
THE POLYTECHNIC INSTITUTE OF NYU OFFICE OF SPONSORED RESEARCH 6 MICROTECH CENTER BROOKLYN,NY 11201	11-1630820	501(C)(3)	100,000				SUPPORT THE CENTRAL BROOKLYN STEM INITIATIVE PROGRAM
UNION OF MINORITY NEIGHBORHOODS42 SEAVERNS AVENUE JAMAICA PLAIN,MA 02130	20-0011504	501(C)(3)	7,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN MASSACHUSETTS

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED WAY OF NEW YORK CITY2 PARK AVENUE NEW YORK, NY 10016	13-2617681	501(C)(3)	30,000				CHILDCARE & EARLY EDUCATION FUND
VIETNAMESE AMERICAN YOUNG LEADERS ASSOCIATION4646 MICOUD BLVD SUITE D2 NEW ORLEANS, LA 70129	33-1143213	501(C)(3)	50,000				SUPPORT WORK AS PART OF OPPORTUNITY TO LEARN CAMPAIGN IN LOUISIANA

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC Code section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
WHEELOCK COLLEGE200 THE RIVERWAY BOSTON,MA 02215	04-2103639	501(C)(3)	10,000				SUPPORT COMMUNITY DIALOGUE & BOARD DISCRETIONARY GRANT
YOUTHBUILD USA 58 DAY STREET SOMERVILLE,MA 02144	22-3076454	501(C)(3)	45,500				INCREASE YOUTH PARTICIPATION TO ACCESS TO HIGH-QUALITY EDUCATIONAL EXPERIENCES

Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
► Complete if the organization answered "Yes" to Form 990, Part IV, question 23.
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items ☐ First-class or charter travel ☐ Housing allowance or residence for personal use ☐ Travel for companions ☐ Payments for business use of personal residence ☐ Tax idemnification and gross-up payments ☑ Health or social club dues or initiation fees ☐ Discretionary spending account ☐ Personal services (e g , maid, chauffeur, chef)			
b	If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement orprovision of all the expenses described above? If "No," complete Part III to explain	**1b**	Yes	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	**2**	Yes	
3	Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply ☑ Compensation committee ☑ Written employment contract ☑ Independent compensation consultant ☑ Compensation survey or study ☐ Form 990 of other organizations ☑ Approval by the board or compensation committee			
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization			
a	Receive a severance payment or change-of-control payment?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III	**4c**		No
	Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.			
5	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of			
a	The organization?	**5a**		No
b	Any related organization? If "Yes," to line 5a or 5b, describe in Part III	**5b**		No
6	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of			
a	The organization?	**6a**		No
b	Any related organization? If "Yes," to line 6a or 6b, describe in Part III	**6b**		No
7	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**	Yes	
8	Were any amounts reported in Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	**9**		

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, columns (D) and (E) for that individual

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) JOHN H JACKSON	(i)	316,594	14,000	0	25,400	13,784	369,778	0
	(ii)	0	0	0	0	0	0	0
(2) ALFRED T MILLER JR	(i)	138,303	7,000	123	4,667	24,742	174,835	0
	(ii)	0	0	0	0	0	0	0
(3) CASSIE SCHWERNER	(i)	168,298	0	0	14,000	31,547	213,845	0
	(ii)	0	0	0	0	0	0	0

Part III Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8 Also complete this part for any additional information

Identifier	Return Reference	Explanation
	PART I, LINE 1A	ALL EMPLOYEES, INCLUDING THE PRESIDENT AND CEO ARE ELIGIBLE TO BE REIMBURSED $75 PER MONTH FOR HEALTH CLUB MEMBERSHIP
	PART I, LINE 7	JOHN JACKSON'S BONUSES ARE DECIDED BY THE BOARD CHAIR, GREG JOBIN-LEEDS ALFRED MILLER'S BONUS IS DECIDED BY JOHN JACKSON AND IS BASED ON EMPLOYEE PERFORMANCE AND THE BUDGET OF THE ORGANIZATION

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493059005113

SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION A, LINE 2	GREG JOBIN-LEEDS AND MARIA JOBIN-LEEDS ARE HUSBAND AND WIFE GREG JOBIN-LEEDS IS THE SON OF LISELOTTE J LEEDS AND GERARD G LEEDS GERARD G LEEDS AND LISELOTTE J LEEDS ARE HUSBAND AND WIFE
	FORM 990, PART VI, SECTION B, LINE 11	THE FORM 990 IS PREPARED BY THE ORGANIZATION'S OUTSIDE ACCOUNTANTS AND IS PROVIDED TO THE BOARD VIA E-MAIL PRIOR TO BEING FILED
	FORM 990, PART VI, SECTION B, LINE 12C	ANNUALLY, ALL DIRECTORS REVIEW A LIST OF CURRENT GRANTEES AND VENDOR SIGNIFICANT PARTNERS AND DECLARE ANY CONFLICTS OR POTENTIAL CONFLICTS THE CONFLICT OF INTEREST POLICY IS DISTRIBUTED ANNUALLY ALL OFFICERS AND DIRECTORS ARE REQUIRED TO SIGN AN ANNUAL ACKNOWLEDGEMENT THAT THEY HAVE RECEIVED A COPY OF THE POLICY, UNDERSTAND IT, AND AGREE TO ABIDE BY ITS TERMS
	FORM 990, PART VI, SECTION B, LINE 15	THE PROCESS OF DETERMINING INITIAL COMPENSATION OF THE ORGANIZATIONS CHIEF EXECUTIVE OFFICER AND OTHER OFFICERS AND KEY EMPLOYEES INCLUDES A REVIEW BY AN OUTSIDE SEARCH FIRM A SET OF PARAMETERS INCLUDING SALARY AND JOB DESCRIPTION GUIDELINES IS CONVEYED TO THE RECRUITMENT FIRM THE RECRUITMENT FIRM WILL SEEK OUT INDIVIDUALS WITH THE APPROPRIATE BACKGROUND AND ALSO MAKE RECOMMENDATIONS AS TO THE COMPARABLE SALARIES FOR SIMILAR POSITIONS THE BASIS OF THE COMPENSATION DECISION IS DOCUMENTED AND BASED ON A DETERMINATION THAT THE AMOUNT PAID IS NO MORE THAN REASONABLE IN VIEW OF SERVICES RENDERED THE EXECUTIVE COMMITTEE MANAGES THIS PROCESS AND MAKES A RECOMMENDATION TO THE FULL BOARD
	FORM 990, PART VI, SECTION C, LINE 19	THE ORGANIZATION MAKES IT GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST AN INTERESTED PARTY MAY MAKE A REQUEST DIRECTLY TO THE ORGANIZATION ADDITIONALLY, THE FORM 990 AND AUDITED FINANCIAL STATEMENTS ARE AVAILABLE VIA THE MASSACHUSETTS ATTORNEY GENERAL'S WEBSITE
CHANGES IN NET ASSETS OR FUND BALANCES	FORM 990, PART XI, LINE 5	NET UNREALIZED GAINS ON INVESTMENTS 305,157

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number
04-3457065

Part I **Identification of Disregarded Entities** (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II **Identification of Related Tax-Exempt Organizations** (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled organization Yes	No
(1) CAROLINE & SIGMUND SCHOTT FUND 675 MASSACHUSETTS AVENUE 8TH FL CAMBRIDGE, MA 02139 11-2856561	PRIVATE GRANTMAKING FOUNDATION	MA	501(C)(3)	PF	N/A	Yes	
(2) THE OPPORTUNITY TO LEARN ACTION FUND 675 MASSACHUSETTS AVENUE 8TH FL CAMBRIDGE, MA 02139 27-4836929	ADVOCACY ORGANIZATION - EDUCATIONAL	DC	501(C)(4)	N/A	N/A	Yes	

Part III **Identification of Related Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust** (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership

Part V Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, 35A, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III or IV

			Yes	No
1	During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a	Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties **(iv)** rent from a controlled entity	**1a**		**No**
b	Gift, grant, or capital contribution to related organization(s)	**1b**		**No**
c	Gift, grant, or capital contribution from related organization(s)	**1c**	**Yes**	
d	Loans or loan guarantees to or for related organization(s)	**1d**		**No**
e	Loans or loan guarantees by related organization(s)	**1e**		**No**
f	Sale of assets to related organization(s)	**1f**		**No**
g	Purchase of assets from related organization(s)	**1g**		**No**
h	Exchange of assets with related organization(s)	**1h**		**No**
i	Lease of facilities, equipment, or other assets to related organization(s)	**1i**		**No**
j	Lease of facilities, equipment, or other assets from related organization(s)	**1j**		**No**
k	Performance of services or membership or fundraising solicitations for related organization(s)	**1k**	**Yes**	
l	Performance of services or membership or fundraising solicitations by related organization(s)	**1l**		**No**
m	Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	**1m**	**Yes**	
n	Sharing of paid employees with related organization(s)	**1n**	**Yes**	
o	Reimbursement paid to related organization(s) for expenses	**1o**		**No**
p	Reimbursement paid by related organization(s) for expenses	**1p**	**Yes**	
q	Other transfer of cash or property to related organization(s)	**1q**		**No**
r	Other transfer of cash or property from related organization(s)	**1r**		**No**

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	**(b)** Transaction type(a-r)	**(c)** Amount involved	**(d)** Method of determining amount involved
(1) CAROLINE & SIGMUND SCHOTT FUND	C	1,572,000	CASH
(2) CAROLINE & SIGMUND SCHOTT FUND	K	35,000	CASH
(3) THE OPPORTUNITY TO LEARN ACTION FUND -INCLUDES TYPE M P K & N TRANSACTION	M	33,834	CASH
(4)			
(5)			
(6)			

Part VI **Unrelated Organizations Taxable as a Partnership** (Complete if the organization answered "Yes" on Form 990, Part IV, line 37.)

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization See instructions regarding exclusion for certain investment partnerships

(a) Name, address, and EIN of entity	**(b)** Primary activity	**(c)** Legal domicile (state or foreign country)	**(d)** Predominant income(related, unrelated, excluded from tax under sections 512-514)	**(e)** Are all partners section 501(c)(3) organizations?		**(f)** Share of total income	**(g)** Share of end-of-year assets	**(h)** Disproprtionate allocations?		**(i)** Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	**(j)** General or managing partner?		**(k)** Percentage ownership
				Yes	**No**			**Yes**	**No**		**Yes**	**No**	

Part VII Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions)

Identifier	Return Reference	Explanation

Additional Data

Software ID:
Software Version:
EIN: 04-3457065
Name: THE SCHOTT FDTN FOR PUBLIC EDUCATION

Form 990, Special Condition Description:

Special Condition Description

Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)

4d. Other program services

(Code) (Expenses $ 3,740 including grants of $) (Revenue $)
EDUCATION VOTERS INSTITUTE

(Code) (Expenses $ 1,332 including grants of $ 1,270) (Revenue $)
WOMEN'S PIPELINE FOR CHANGE