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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 private foundations)

Do not enter social security numbers on this form as it may be made public  
Information about Form 990 and its instructions is at [www.irs.gov/form990](#)

OMB No 1545-0047

2015

Open to Public Inspection

A For the 2015 calendar year, or tax year beginning 07-01-2015, and ending 06-30-2016

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Final return/terminated

☐ Amended return

☐ Application pending

C Name of organization  
BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION

Doing business as

Number and street (or P O box if mail is not delivered to street address) Room/suite

592 TENTH STREET NW

City or town, state or province, country, and ZIP or foreign postal code  
ATLANTA, GA 303185776

D Employer identification number  
58-0566141

E Telephone number  
(404) 875-9211

G Gross receipts \$ 31,884,552

F Name and address of principal officer  
DAVID SPENCE  
592 TENTH STREET NW  
ATLANTA,GA 303185776

H(a) Is this a group return for subordinates?

☐ Yes ☒ No

H(b) Are all subordinates 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.SREB.ORG

K Form of organization ☐ Corporation ☐ Trust ☐ Association ☒ Other ▶ COMPACT

L Year of formation 1948

M State of legal domicile GA

| Part I Summary                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             |              |            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------|------------|
| Activities & Governance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>1</b> Briefly describe the organization's mission or most significant activities<br>THE BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION SHALL BE DEVOTED TO THE TASK OF ASSISTING STATES, INSTITUTIONS AND AGENCIES CONCERNED WITH HIGHER EDUCATION IN THEIR EFFORTS TO ADVANCE KNOWLEDGE AND TO IMPROVE THE SOCIAL AND ECONOMIC LEVEL OF THE SOUTHERN REGION. IN AIDING SUCH STATES, INSTITUTIONS AND AGENCIES, THE BOARD SHALL EXPLORE FULLY, RECOMMEND WHERE DESIRABLE, AND DEVELOP WHERE NEEDED, INTERSTATE COLLABORATION IN THE SUPPORT, EXPANSION OR ESTABLISHMENT OF REGIONAL SERVICES OR SCHOOLS FOR GRADUATE, PROFESSIONAL AND TECHNICAL EDUCATION |             |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>3</b> Number of voting members of the governing body (Part VI, line 1a)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>3</b>    | 80           |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>4</b>    | 80           |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>5</b> Total number of individuals employed in calendar year 2015 (Part V, line 2a)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>5</b>    | 174          |            |
| Revenue                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>6</b> Total number of volunteers (estimate if necessary)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <b>6</b>    | 80           |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>7a</b>   | 0            |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>b</b> Net unrelated business taxable income from Form 990-T, line 34                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>7b</b>   | 0            |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>8</b> Contributions and grants (Part VIII, line 1h)<br><b>9</b> Program service revenue (Part VIII, line 2g)<br><b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)<br><b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)<br><b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)                                                                                                                                                                                                                                                                                  | Prior Year  | Current Year |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 24,634      | 25,220       |            |
| Expenses                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 24,979,421  | 31,534,085   |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 217,653     | 325,247      |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 0           | 0            |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 25,221,708  | 31,884,552   |            |
| <b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3)<br><b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)<br><b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)<br><b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)<br><b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶0<br><b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)<br><b>18</b> Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)<br><b>19</b> Revenue less expenses. Subtract line 18 from line 12 | 0                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 1,638,299   |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Net Assets or Fund Balances                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |             | 0            | 0          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             | 12,780,324   | 13,556,471 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             | 0            | 0          |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             | 14,227,520   | 17,267,552 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             | 27,007,844   | 32,462,322 |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |             | -1,786,136   | -577,770   |
| <b>20</b> Total assets (Part X, line 16)<br><b>21</b> Total liabilities (Part X, line 26)<br><b>22</b> Net assets or fund balances. Subtract line 21 from line 20                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Beginning of Current Year                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | End of Year |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 43,597,654                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 45,715,229  |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 15,040,629                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 17,426,581  |              |            |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 28,557,025                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 28,288,648  |              |            |

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

\*\*\*\*\*  
Signature of officer

2016-10-17  
Date

BARBARA CHANNELL DIRECTOR FINANCE & FACILITIES  
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name  
Susan Hill

Preparer's signature  
Susan Hill

Date  
2016-10-17

Check ☐ if self-employed

PTIN  
P00846200

Firm's name ▶ Warren Averett LLC

Firm's EIN ▶ 45-4084437

Firm's address ▶ Six Concourse Parkway Suite 600  
Atlanta, GA 30328

Phone no (770) 396-1100

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990(2015)

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

☒

1

Briefly describe the organization's mission

THE BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION SHALL BE DEVOTED TO THE TASK OF ASSISTING STATES, INSTITUTIONS AND AGENCIES CONCERNED WITH HIGHER EDUCATION IN THEIR EFFORTS TO ADVANCE KNOWLEDGE AND TO IMPROVE THE SOCIAL AND ECONOMIC LEVEL OF THE SOUTHERN REGION IN AIDING SUCH STATES, INSTITUTIONS AND AGENCIES, THE BOARD SHALL EXPLORE FULLY, RECOMMEND WHERE DESIRABLE, AND DEVELOP WHERE NEEDED, INTERSTATE COLLABORATION IN THE SUPPORT, EXPANSION OR ESTABLISHMENT OF REGIONAL SERVICES OR SCHOOLS FOR GRADUATE, PROFESSIONAL AND TECHNICAL EDUCATION

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 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 \$ 6,817,504 including grants of \$ 736,982 ) (Revenue \$ 6,817,504 )                                    | SREB made significant progress on each section of these grants, which were separately awarded but funded the same components and program initiatives The Benchmarking component published a professional learning report, concluding a multi-year study of 15 state efforts to foster effective professional learning for educators on state K-12 college- and career-readiness standards in English language arts and math Multiple new sites began implementing LDC/MDC tools, as state trainers worked with teacher facilitators across multiple sites on implementation of formative assessment lessons and strategies of assessment for learning This effort spanned across 8 states, reaching a total of 485 schools and 2280 teachers Major activities included training district leaders as LDC/MDC master trainers, recruiting schools to participate in program rollout during the 2016-17 school year, conducting site visits, providing coaching and professional development for schools, and developing school-level action plans to grow and sustain LDC/MDC for the 2016-17 school year The Readiness Course component achieved significant progress as over 589 teachers in 8 states received training to implement SREB Literacy and Math Ready Readiness Courses, development of the Ready for High School Math and Ready for High School Literacy courses was concluded, and the SREB Ready Pnnting Service was established to support districts seeking to print larger quantities of course materials The Ready for High School courses will be broadly piloted in North Carolina and Alabama during the upcoming school year, along with more focused pilot efforts in South Carolina and Mississippi SREB continues to provide intensive CTE curriculum through the Advanced Career program, offered in over 76 high schools and technology centers across 17 different states Trainings for 81 teachers were held these courses in 2016, and 1,153 students were assessed with end of course exams in the Fall of 2015 and the Spring of 2016 who had completed an Advanced Careers course The Educator Effectiveness component established memoranda of understanding for technical assistance sub-grants with the Alabama, Arkansas, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, and West Virginia state departments of education to support improvements in the design and implementation of teacher and principal evaluation systems This component also published three focus group reports, and a regional report on state systems with ten actions to advance teacher evaluation The Teacher Preparation component convened nearly 50 policymakers, K-12 district leaders, postsecondary institutional leaders, and experts in the field from throughout the region as SREB launched the Teacher Preparation Commission focused on building effective policy in areas such as program approval, licensure, certification and accountability                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 4b | (Code ) (Expenses \$ 6,554,800 including grants of \$ 901,317 ) (Revenue \$ 6,554,800 )                                    | SREB made significant progress on each section of these grants, which were separately awarded but funded the same components and program initiatives The Benchmarking component published a professional learning report, concluding a multi-year study of 15 state efforts to foster effective professional learning for educators on state K-12 college- and career-readiness standards in English language arts and math Multiple new sites began implementing LDC/MDC tools, as state trainers worked with teacher facilitators across multiple sites on implementation of formative assessment lessons and strategies of assessment for learning This effort spanned across 8 states, reaching a total of 485 schools and 2280 teachers Major activities included training district leaders as LDC/MDC master trainers, recruiting schools to participate in program rollout during the 2016-17 school year, conducting site visits, providing coaching and professional development for schools, and developing school-level action plans to grow and sustain LDC/MDC for the 2016-17 school year The Readiness Course component achieved significant progress as over 589 teachers in 8 states received training to implement SREB Literacy and Math Ready Readiness Courses, development of the Ready for High School Math and Ready for High School Literacy courses was concluded, and the SREB Ready Pnnting Service was established to support districts seeking to print larger quantities of course materials The Ready for High School courses will be broadly piloted in North Carolina and Alabama during the upcoming school year, along with more focused pilot efforts in South Carolina and Mississippi SREB continues to provide intensive CTE curriculum through the Advanced Career program, offered in over 76 high schools and technology centers across 17 different states Trainings for 81 teachers were held these courses in 2016, and 1,153 students were assessed with end of course exams in the Fall of 2015 and the Spring of 2016 who had completed an Advanced Careers course The Educator Effectiveness component established memoranda of understanding for technical assistance sub-grants with the Alabama, Arkansas, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, and West Virginia state departments of education to support improvements in the design and implementation of teacher and principal evaluation systems This component also published three focus group reports, and a regional report on state systems with ten actions to advance teacher evaluation The Teacher Preparation component convened nearly 50 policymakers, K-12 district leaders, postsecondary institutional leaders, and experts in the field from throughout the region as SREB launched the Teacher Preparation Commission focused on building effective policy in areas such as program approval, licensure, certification and accountability                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 4c | (Code ) (Expenses \$ 1,351,554 including grants of \$ 0 ) (Revenue \$ 2,206,983 )                                          | 1 The NM State Network CT Focused ServicesThe New Mexico Public Education Department has partnered with SREB/HSTW to create four model high quality Programs of Study in the state This partnership required a shift in the services previously provided through the New Mexico HSTW State Network With the focus on creating model Programs of Study, an application process was set forth to assist in selecting four sites, one from each of the state's workforce development regions These four sites received intensive coaching and professional development to align courses with the needs of both postsecondary and local business partners Each school was expected to identify at least one model program area that was based on employability data and student interests After identifying the target program areas, schools were assisted in solidifying a rigorous four course sequence and acceleration options for students The state has identified that acceleration options included postsecondary coursework, industry recognized credentials or work based learning experiences As a result, each of the four sites generated clear road maps to support their model programs and identified key data points that will be used to monitor implementation and success 2 Using the Enhanced Career Technical Education Design in New MexicoSREB has led face-to-face training sessions to support the design and implementation of ngorous Project Based Learning design Teachers have all designed one PBL unit during the first semester and have presented their units (and related student work) to a panel of business representatives at the last meeting in January The showcase meeting allowed teachers to receive feedback on their projects and student work that included strengths of the project and refinement areas The business representatives also participated in a brainstorming activity with the PBL Experts In addition to creating work-place scenarios, the brainstorming teams also identified reading, wrting and mathematics connections that students would encounter on the job 3 Supporting Leaders to Enhance or Adopt a Rigorous Program of StudyThe state provided leadership training to administrators to directly support programs of study (POS) The training series included 4 days of face-to-face training that was supported by monthly webinars and school site progress monitoring visits The series was based on the SREB Program of Study Evaluation Rubric and provided administrators with steps to ensure the alignment of POS with student and community needs The administrators reviewed the current status of Programs of Study for their campus, supporting the design of a Signature Feature POS 4 CT Study and Advanced Careers in New Mexico Moving ForwardThe state's final CTE Study Report was released in June of 2015 During the current school year, the state has worked to disseminate the findings of the CTE Study to stakeholders across the state SREB has assisted the state by facilitating work sessions and presenting the summary of findings to state, district and school CTE leaders SREB has also worked to craft guide books that will be used to communicate the expectations for Programs of Study across the state These CTE Program Guide Books will serve as the "how to" guide for developing and enhancing Programs of Study across the state To support the emphasis on ngorous, relevant career pathway programs of study, the state has formally adopted two of SREB's Advanced Careers Pathways The Energy and Power Pathway and Innovations in Science and Technology Pathway have been promoted on the state's website as exemplars 5 NM TEACH - Supporting Quality InstructionSREB has partnered with the New Mexico Public Education Department to support the state's NM TEACH Observation Protocol The NM TEACH system is currently in the third year of implementation To support administrators, SREB assisted with the design of a two day summer training session for administrators Within the 2015-2016 school year, the NMTEACH team worked to create on-line resources to support the observation process These resources included web-based modules to support continuous improvement and a video collection of highly effective classroom practices The NMTEACH team also facilitated train the trainer and steering committee sessions to support sustainability as the process moves into the fourth year of implementation |
|    | See Additional Data                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 4d | Other program services (Describe in Schedule O ) (Expenses \$ 16,109,901 including grants of \$ ) (Revenue \$ 15,954,798 ) |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 4e | Total program service expenses ► 30,833,759                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

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.<br>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       | No |
| 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 for escrow or custodial account liability, 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, line 10? 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 and XII                                                                                                                                                        | 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 and XII 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, Parts I and IV | 14b     | No |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts 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 other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts 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 (see instructions)                                                                                            | 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      | No |
| 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 hospital facilities? If "Yes," complete Schedule H                                                                                                                                                                                                             | 20a     | No |
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?                                                                                                                                                                                              | 20b     |    |

Part IV Checklist of Required Schedules (continued)

|     |                                                                                                                                                                                                                                                                                                                     |     |     |    |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|----|
| 21  | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government 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 or other assistance to or for domestic individuals 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, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J . . . . .                                                      | 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 lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .                            | 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 | <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b>                                                                                                                                                                                                                                                  |     |     |    |
|     | 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  | Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? 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 employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? 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 | Yes |    |
| 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 direct or indirect 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, Part II, III, or IV, and Part V, line 1 . . . . .                                                                                                                                                                  | 34  |     | No |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)?                                                                                                                                                                                                                             | 35a |     | No |
| b   | If "Yes" to line 35a, 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 |     |    |
| 36  | <b>Section 501(c)(3) organizations.</b> 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 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .                                                                                                                       | 38  | Yes |    |

Check if Schedule O contains a response or note to any line in this Part V ☐

Form **990** (2015)

**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 or note to any line in this Part VI ☒

**Section A. Governing Body and Management**

|           |                                                                                                                                                                                                                                                                                                         | Yes | No |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1a</b> | Enter the number of voting members of the governing body at the end of the tax year<br>If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O | 80  |    |
| <b>b</b>  | Enter the number of voting members included in line 1a, above, who are independent                                                                                                                                                                                                                      | 80  |    |
| <b>2</b>  | 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?                                                                                                                                   |     | No |
| <b>3</b>  | 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?                                                                                     |     | No |
| <b>4</b>  | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?                                                                                                                                                                                        |     | No |
| <b>5</b>  | Did the organization become aware during the year of a significant diversion of the organization's assets?                                                                                                                                                                                              |     | No |
| <b>6</b>  | Did the organization have members or stockholders?                                                                                                                                                                                                                                                      | Yes |    |
| <b>7a</b> | 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?                                                                                                                                                      | Yes |    |
| <b>b</b>  | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?                                                                                                                                               |     | No |
| <b>8</b>  | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following                                                                                                                                                                        |     |    |
| <b>a</b>  | The governing body?                                                                                                                                                                                                                                                                                     | Yes |    |
| <b>b</b>  | Each committee with authority to act on behalf of the governing body?                                                                                                                                                                                                                                   | Yes |    |
| <b>9</b>  | 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                                                                                            |     | No |

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

|            |                                                                                                                                                                                                                                                                                              | Yes | No |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>10a</b> | Did the organization have local chapters, branches, or affiliates?                                                                                                                                                                                                                           |     | No |
| <b>b</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?                                                                   |     |    |
| <b>11a</b> | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?                                                                                                                                                                  | Yes |    |
| <b>b</b>   | Describe in Schedule O the process, if any, used by the organization to review this Form 990                                                                                                                                                                                                 |     |    |
| <b>12a</b> | Did the organization have a written conflict of interest policy? If "No," go to line 13                                                                                                                                                                                                      | Yes |    |
| <b>b</b>   | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?                                                                                                                                                          | Yes |    |
| <b>c</b>   | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done                                                                                                                                           | Yes |    |
| <b>13</b>  | Did the organization have a written whistleblower policy?                                                                                                                                                                                                                                    | Yes |    |
| <b>14</b>  | Did the organization have a written document retention and destruction policy?                                                                                                                                                                                                               | Yes |    |
| <b>15</b>  | 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?                                                                         |     |    |
| <b>a</b>   | The organization's CEO, Executive Director, or top management official                                                                                                                                                                                                                       | Yes |    |
| <b>b</b>   | Other officers or key employees of the organization                                                                                                                                                                                                                                          | Yes |    |
|            | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)                                                                                                                                                                                                           |     |    |
| <b>16a</b> | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?                                                                                                                                        |     | No |
| <b>b</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? |     |    |

**Section C. Disclosure**

**17** List the States with which a copy of this Form 990 is required to be filed **GA**

**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 ☐ Other (explain in Schedule O)

**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 during the tax year

**20** State the name, address, and telephone number of the person who possesses the organization's books and records  
**BARBARA CHANNELL** 592 Tenth Street NW Atlanta, GA 30318 (404) 875-9211

Check if Schedule O contains a response or note to any line in this Part VII ☐

**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. 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 organization compensated any current officer, director, or trustee

[illegible]



[illegible]

**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 ► 30

|   |                                                                                                                                                                                                                                               | Yes | No  |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| 3 | Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> . . . . .                                        | 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? <i>If "Yes," complete Schedule J for such individual</i> . . . . . | 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? <i>If "Yes," complete Schedule J for such person</i> . . . . .                       | 5   | No  |

| <b>1</b> 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)<br>Name and business address                                                                                                                                                                                                                           | (B)<br>Description of services | (C)<br>Compensation |
| DAVID COLLINS<br><br>PO Box 540346<br>ORLANDO, FL 32854                                                                                                                                                                                                    | CONSULTING                     | 152,100             |
| LESLIE TEXAS CONSULTING<br><br>2430 TRADITION CIRCLE<br>LOUISVILLE, KY 40245                                                                                                                                                                               | CONSULTING                     | 143,400             |
| Paige Graiser<br><br>237 Willow Pond Way<br>Brunswick, GA 31525                                                                                                                                                                                            | CONSULTING                     | 115,800             |
| The Higher Education Policy Institute<br><br>152 N 3rd Street Ste 705<br>San Jose, CA 95112                                                                                                                                                                | CONSULTING                     | 114,000             |
|                                                                                                                                                                                                                                                            |                                |                     |
| <b>2</b> Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ► 4                                                                              |                                |                     |

Part VIII

Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

|                                                           |                                                  |                                                                                                                                  |                | (A)<br>Total revenue | (B)<br>Related or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded from<br>tax under<br>sections<br>512-514 |  |
|-----------------------------------------------------------|--------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|----------------|----------------------|----------------------------------------------------|-----------------------------------------|---------------------------------------------------------------------|--|
| Contributions, Gifts, Grants<br>and Other Similar Amounts | 1a                                               | Federated campaigns . . .                                                                                                        | 1a             |                      |                                                    |                                         |                                                                     |  |
|                                                           | b                                                | Membership dues . . . .                                                                                                          | 1b             |                      |                                                    |                                         |                                                                     |  |
|                                                           | c                                                | Fundraising events . . . .                                                                                                       | 1c             |                      |                                                    |                                         |                                                                     |  |
|                                                           | d                                                | Related organizations . . .                                                                                                      | 1d             |                      |                                                    |                                         |                                                                     |  |
|                                                           | e                                                | Government grants (contributions)                                                                                                | 1e             |                      |                                                    |                                         |                                                                     |  |
|                                                           | f                                                | All other contributions, gifts, grants, and<br>similar amounts not included above                                                | 1f             | 25,220               |                                                    |                                         |                                                                     |  |
|                                                           | g                                                | Noncash contributions included in lines<br>1a-1f \$                                                                              |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | h                                                | Total. Add lines 1a-1f . . . . .                                                                                                 |                |                      | 25,220                                             |                                         |                                                                     |  |
| Program Service Revenue                                   | 2a                                               | CONTRACT REVENUE                                                                                                                 | Business Code  |                      |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  | 900099         | 26,203,666           | 26,203,666                                         |                                         |                                                                     |  |
|                                                           | b                                                | APPROPRIATIONS BY STATES                                                                                                         | 900099         | 2,946,795            | 2,946,795                                          |                                         |                                                                     |  |
|                                                           | c                                                | REGISTRATION FEES                                                                                                                | 900099         | 1,480,177            | 1,480,177                                          |                                         |                                                                     |  |
|                                                           | d                                                | MEMBERSHIP DUES                                                                                                                  | 900099         | 623,538              | 623,538                                            |                                         |                                                                     |  |
|                                                           | e                                                | ASSESSMENTS                                                                                                                      | 900099         | 268,076              | 268,076                                            |                                         |                                                                     |  |
|                                                           | f                                                | All other program service revenue                                                                                                |                | 11,833               | 11,833                                             |                                         |                                                                     |  |
|                                                           | g                                                | Total. Add lines 2a-2f . . . . .                                                                                                 |                |                      | 31,534,085                                         |                                         |                                                                     |  |
| Other Revenue                                             | 3                                                | Investment income (including dividends, interest,<br>and other similar amounts) . . . . .                                        |                | 325,247              |                                                    |                                         | 325,247                                                             |  |
|                                                           | 4                                                | Income from investment of tax-exempt bond proceeds . .                                                                           |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | 5                                                | Royalties . . . . .                                                                                                              |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | 6a                                               | Gross rents                                                                                                                      | (i) Real       | (ii) Personal        |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | b                                                | Less rental expenses                                                                                                             |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | c                                                | Rental income or (loss)                                                                                                          |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | d                                                | Net rental income or (loss) . . . . .                                                                                            |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | 7a                                               | Gross amount from sales of assets other than inventory                                                                           | (i) Securities | (ii) Other           |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | b                                                | Less cost or other basis and sales expenses                                                                                      |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | c                                                | Gain or (loss)                                                                                                                   |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | d                                                | Net gain or (loss) . . . . .                                                                                                     |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | 8a                                               | Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c)<br>See Part IV, line 18 . . . | a              |                      |                                                    |                                         |                                                                     |  |
|                                                           | b                                                | Less direct expenses . . . .                                                                                                     | b              |                      |                                                    |                                         |                                                                     |  |
|                                                           | c                                                | Net income or (loss) from fundraising events . .                                                                                 |                |                      |                                                    |                                         |                                                                     |  |
|                                                           | 9a                                               | Gross income from gaming activities<br>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                                                       |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
| b                                                         |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
| c                                                         |                                                  |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
| d                                                         | All other revenue . . . .                        |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
| e                                                         | Total. Add lines 11a-11d . . . . .               |                                                                                                                                  |                |                      |                                                    |                                         |                                                                     |  |
| 12                                                        | Total revenue. See Instructions . . . . .        |                                                                                                                                  |                | 31,884,552           | 31,534,085                                         | 0                                       | 325,247                                                             |  |

**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)

Check if Schedule O contains a response or note to any line in this Part IX . . . . .



| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. |                                                                                                                                                                                                                                               | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| 1                                                                              | Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 . . . . .                                                                                                                                | 1,638,299             | 1,638,299                       |                                        |                             |
| 2                                                                              | Grants and other assistance to domestic individuals. See Part IV, line 22 . . . . .                                                                                                                                                           |                       |                                 |                                        |                             |
| 3                                                                              | Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 . . . . .                                                                                                    |                       |                                 |                                        |                             |
| 4                                                                              | Benefits paid to or for members . . . . .                                                                                                                                                                                                     |                       |                                 |                                        |                             |
| 5                                                                              | Compensation of current officers, directors, trustees, and key employees . . . . .                                                                                                                                                            | 1,478,710             | 345,048                         | 1,133,662                              |                             |
| 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 . . . . .                                                                                                                                                                                                            | 9,870,678             | 9,870,678                       |                                        |                             |
| 8                                                                              | Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .                                                                                                                                  | 848,161               | 848,161                         |                                        |                             |
| 9                                                                              | Other employee benefits . . . . .                                                                                                                                                                                                             | 548,092               | 548,092                         |                                        |                             |
| 10                                                                             | Payroll taxes . . . . .                                                                                                                                                                                                                       | 810,830               | 747,078                         | 63,752                                 |                             |
| 11                                                                             | Fees for services (non-employees)                                                                                                                                                                                                             |                       |                                 |                                        |                             |
| a                                                                              | Management . . . . .                                                                                                                                                                                                                          |                       |                                 |                                        |                             |
| b                                                                              | Legal . . . . .                                                                                                                                                                                                                               | 26,011                | 26,011                          |                                        |                             |
| c                                                                              | Accounting . . . . .                                                                                                                                                                                                                          | 52,220                | 52,220                          |                                        |                             |
| d                                                                              | Lobbying . . . . .                                                                                                                                                                                                                            |                       |                                 |                                        |                             |
| e                                                                              | Professional fundraising services. See Part IV, line 17                                                                                                                                                                                       |                       |                                 |                                        |                             |
| f                                                                              | Investment management fees . . . . .                                                                                                                                                                                                          | 47,997                |                                 | 47,997                                 |                             |
| g                                                                              | Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) . . . . .                                                                                                                          | 8,933,334             | 8,786,344                       | 146,990                                |                             |
| 12                                                                             | Advertising and promotion . . . . .                                                                                                                                                                                                           |                       |                                 |                                        |                             |
| 13                                                                             | Office expenses . . . . .                                                                                                                                                                                                                     | 667,389               | 627,109                         | 40,280                                 |                             |
| 14                                                                             | Information technology . . . . .                                                                                                                                                                                                              | 227,532               | 119,358                         | 108,174                                |                             |
| 15                                                                             | Royalties . . . . .                                                                                                                                                                                                                           |                       |                                 |                                        |                             |
| 16                                                                             | Occupancy . . . . .                                                                                                                                                                                                                           | 329,532               | 160,720                         | 168,812                                |                             |
| 17                                                                             | Travel . . . . .                                                                                                                                                                                                                              | 2,308,426             | 2,192,038                       | 116,388                                |                             |
| 18                                                                             | Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .                                                                                                                                      |                       |                                 |                                        |                             |
| 19                                                                             | Conferences, conventions, and meetings . . . . .                                                                                                                                                                                              | 4,184,557             | 4,184,557                       |                                        |                             |
| 20                                                                             | Interest . . . . .                                                                                                                                                                                                                            |                       |                                 |                                        |                             |
| 21                                                                             | Payments to affiliates . . . . .                                                                                                                                                                                                              |                       |                                 |                                        |                             |
| 22                                                                             | Depreciation, depletion, and amortization . . . . .                                                                                                                                                                                           | 157,388               |                                 | 157,388                                |                             |
| 23                                                                             | Insurance . . . . .                                                                                                                                                                                                                           | 72,999                | 72,999                          |                                        |                             |
| 24                                                                             | Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O) . . . . .                                    |                       |                                 |                                        |                             |
| a                                                                              | START-UP PROGRAM EXPENSES                                                                                                                                                                                                                     | 152,597               |                                 | 152,597                                |                             |
| b                                                                              | DUES AND SUBSCRIPTIONS                                                                                                                                                                                                                        | 41,782                | 41,782                          |                                        |                             |
| c                                                                              | OTHER ADMIN EXPENSES                                                                                                                                                                                                                          | 32,837                |                                 | 32,837                                 |                             |
| d                                                                              | TUITION/STAFF DEVELOPMENT                                                                                                                                                                                                                     | 27,529                | 27,529                          |                                        |                             |
| e                                                                              | All other expenses                                                                                                                                                                                                                            | 5,422                 | 545,736                         | -540,314                               |                             |
| 25                                                                             | <b>Total functional expenses.</b> Add lines 1 through 24e                                                                                                                                                                                     | 32,462,322            | 30,833,759                      | 1,628,563                              | 0                           |
| 26                                                                             | <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720) |                       |                                 |                                        |                             |

**Part X**

**Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part X ☐

|                             |                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                         |            |           | (A)               |            | (B)         |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|-------------------|------------|-------------|
|                             |                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                         |            |           | Beginning of year |            | End of year |
| Assets                      | <b>1</b>                                                                                                                                                   | Cash—non-interest-bearing . . . . .                                                                                                                                                                                                                                                                                                     |            |           | 1,621,356         | <b>1</b>   | 2,377,710   |
|                             | <b>2</b>                                                                                                                                                   | Savings and temporary cash investments . . . . .                                                                                                                                                                                                                                                                                        |            |           | 23,826,243        | <b>2</b>   | 12,816,283  |
|                             | <b>3</b>                                                                                                                                                   | Pledges and grants receivable, net . . . . .                                                                                                                                                                                                                                                                                            |            |           | 1,510,715         | <b>3</b>   | 12,404,807  |
|                             | <b>4</b>                                                                                                                                                   | Accounts receivable, net . . . . .                                                                                                                                                                                                                                                                                                      |            |           | 885               | <b>4</b>   | 1,126       |
|                             | <b>5</b>                                                                                                                                                   | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .                                                                                                                                                           |            |           |                   | <b>5</b>   |             |
|                             | <b>6</b>                                                                                                                                                   | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L . . . . . |            |           |                   | <b>6</b>   |             |
|                             | <b>7</b>                                                                                                                                                   | Notes and loans receivable, net . . . . .                                                                                                                                                                                                                                                                                               |            |           |                   | <b>7</b>   |             |
|                             | <b>8</b>                                                                                                                                                   | Inventories for sale or use . . . . .                                                                                                                                                                                                                                                                                                   |            |           |                   | <b>8</b>   |             |
|                             | <b>9</b>                                                                                                                                                   | Prepaid expenses and deferred charges . . . . .                                                                                                                                                                                                                                                                                         |            |           | 716,705           | <b>9</b>   | 819,914     |
|                             | <b>10a</b>                                                                                                                                                 | Land, buildings, and equipment—cost or other basis. Complete Part VI of Schedule D . . . . .                                                                                                                                                                                                                                            | <b>10a</b> | 3,361,402 |                   |            |             |
|                             | <b>b</b>                                                                                                                                                   | Less: accumulated depreciation . . . . .                                                                                                                                                                                                                                                                                                | <b>10b</b> | 2,278,009 | 1,217,063         | <b>10c</b> | 1,083,393   |
|                             | <b>11</b>                                                                                                                                                  | Investments—publicly traded securities . . . . .                                                                                                                                                                                                                                                                                        |            |           | 14,704,687        | <b>11</b>  | 16,211,996  |
|                             | <b>12</b>                                                                                                                                                  | Investments—other securities. See Part IV, line 11 . . . . .                                                                                                                                                                                                                                                                            |            |           |                   | <b>12</b>  |             |
|                             | <b>13</b>                                                                                                                                                  | Investments—program-related. See Part IV, line 11 . . . . .                                                                                                                                                                                                                                                                             |            |           |                   | <b>13</b>  |             |
|                             | <b>14</b>                                                                                                                                                  | Intangible assets . . . . .                                                                                                                                                                                                                                                                                                             |            |           |                   | <b>14</b>  |             |
|                             | <b>15</b>                                                                                                                                                  | Other assets. See Part IV, line 11 . . . . .                                                                                                                                                                                                                                                                                            |            |           |                   | <b>15</b>  |             |
|                             | <b>16</b>                                                                                                                                                  | <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .                                                                                                                                                                                                                                                              |            |           | 43,597,654        | <b>16</b>  | 45,715,229  |
| Liabilities                 | <b>17</b>                                                                                                                                                  | Accounts payable and accrued expenses . . . . .                                                                                                                                                                                                                                                                                         |            |           | 3,558,320         | <b>17</b>  | 3,720,623   |
|                             | <b>18</b>                                                                                                                                                  | Grants payable . . . . .                                                                                                                                                                                                                                                                                                                |            |           | 2,322,198         | <b>18</b>  | 1,808,817   |
|                             | <b>19</b>                                                                                                                                                  | Deferred revenue . . . . .                                                                                                                                                                                                                                                                                                              |            |           | 9,160,111         | <b>19</b>  | 11,897,141  |
|                             | <b>20</b>                                                                                                                                                  | Tax-exempt bond liabilities . . . . .                                                                                                                                                                                                                                                                                                   |            |           |                   | <b>20</b>  |             |
|                             | <b>21</b>                                                                                                                                                  | Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .                                                                                                                                                                                                                                                         |            |           |                   | <b>21</b>  |             |
|                             | <b>22</b>                                                                                                                                                  | Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .                                                                                                                                          |            |           |                   | <b>22</b>  |             |
|                             | <b>23</b>                                                                                                                                                  | Secured mortgages and notes payable to unrelated third parties . . . . .                                                                                                                                                                                                                                                                |            |           |                   | <b>23</b>  |             |
|                             | <b>24</b>                                                                                                                                                  | Unsecured notes and loans payable to unrelated third parties . . . . .                                                                                                                                                                                                                                                                  |            |           |                   | <b>24</b>  |             |
|                             | <b>25</b>                                                                                                                                                  | 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 . . . . .                                                                                                                                                         |            |           |                   | <b>25</b>  |             |
|                             | <b>26</b>                                                                                                                                                  | <b>Total liabilities.</b> Add lines 17 through 25 . . . . .                                                                                                                                                                                                                                                                             |            |           | 15,040,629        | <b>26</b>  | 17,426,581  |
| Net Assets or Fund Balances | <b>Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b> |                                                                                                                                                                                                                                                                                                                                         |            |           |                   |            |             |
|                             | <b>27</b>                                                                                                                                                  | Unrestricted net assets . . . . .                                                                                                                                                                                                                                                                                                       |            |           | 6,597,525         | <b>27</b>  | 6,750,322   |
|                             | <b>28</b>                                                                                                                                                  | Temporarily restricted net assets . . . . .                                                                                                                                                                                                                                                                                             |            |           | 21,938,500        | <b>28</b>  | 21,517,326  |
|                             | <b>29</b>                                                                                                                                                  | Permanently restricted net assets . . . . .                                                                                                                                                                                                                                                                                             |            |           | 21,000            | <b>29</b>  | 21,000      |
|                             | <b>Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.</b>                          |                                                                                                                                                                                                                                                                                                                                         |            |           |                   |            |             |
|                             | <b>30</b>                                                                                                                                                  | Capital stock or trust principal, or current funds . . . . .                                                                                                                                                                                                                                                                            |            |           |                   | <b>30</b>  |             |
|                             | <b>31</b>                                                                                                                                                  | Paid-in or capital surplus, or land, building or equipment fund . . . . .                                                                                                                                                                                                                                                               |            |           |                   | <b>31</b>  |             |
|                             | <b>32</b>                                                                                                                                                  | Retained earnings, endowment, accumulated income, or other funds . . . . .                                                                                                                                                                                                                                                              |            |           |                   | <b>32</b>  |             |
|                             | <b>33</b>                                                                                                                                                  | <b>Total net assets or fund balances . . . . .</b>                                                                                                                                                                                                                                                                                      |            |           | 28,557,025        | <b>33</b>  | 28,288,648  |
|                             | <b>34</b>                                                                                                                                                  | <b>Total liabilities and net assets/fund balances . . . . .</b>                                                                                                                                                                                                                                                                         |            |           | 43,597,654        | <b>34</b>  | 45,715,229  |

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI ☐

|           |                                                                                                               |           |            |
|-----------|---------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b>  | Total revenue (must equal Part VIII, column (A), line 12) . . . . .                                           | <b>1</b>  | 31,884,552 |
| <b>2</b>  | Total expenses (must equal Part IX, column (A), line 25) . . . . .                                            | <b>2</b>  | 32,462,322 |
| <b>3</b>  | Revenue less expenses Subtract line 2 from line 1 . . . . .                                                   | <b>3</b>  | -577,770   |
| <b>4</b>  | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . .                 | <b>4</b>  | 28,557,025 |
| <b>5</b>  | Net unrealized gains (losses) on investments . . . . .                                                        | <b>5</b>  | 309,393    |
| <b>6</b>  | Donated services and use of facilities . . . . .                                                              | <b>6</b>  |            |
| <b>7</b>  | Investment expenses . . . . .                                                                                 | <b>7</b>  |            |
| <b>8</b>  | Prior period adjustments . . . . .                                                                            | <b>8</b>  |            |
| <b>9</b>  | Other changes in net assets or fund balances (explain in Schedule O) . . . . .                                | <b>9</b>  | 0          |
| <b>10</b> | Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B)) | <b>10</b> | 28,288,648 |

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII ☐

|           |                                                                                                                                                                                                                                                                                                                                                                                                                          | Yes | No |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b>  | Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O                                                                                                                                        |     |    |
| <b>2a</b> | Were the organization's financial statements compiled or reviewed by an independent accountant?<br>If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both<br><input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis |     | No |
| <b>b</b>  | Were the organization's financial statements audited by an independent accountant?<br>If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis                | Yes |    |
| <b>c</b>  | If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?<br>If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O                                                                    | Yes |    |
| <b>3a</b> | 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?                                                                                                                                                                                                                                                                 |     | No |
| <b>b</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                                                                                                                                                                                                     |     |    |

Additional Data

Software ID:  
Software Version:  
EIN: 58-0566141  
Name: BOARD OF CONTROL FOR SOUTHERN  
REGIONAL EDUCATION

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

| (Code                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | (Expenses \$ | 16,109,901 | including grants of \$ | (Revenue \$ | 15,954,798 ) |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------|------------------------|-------------|--------------|
| Advanced Career - Income Stream \$228,184 00 Advanced Careers Arkansas \$13,220 00 Arkansas Dept of Career Education \$16,242 00 Alternative Certification for CTE Teachers \$154,710 00 Advanced Careers General \$1,038,058 00 Advanced Careers New Jersey \$94,513 00 Advanced Career Texas \$125,624 00 SREB-AGEP Doctoral Scholars Program \$5,132 00 Alamogordo Public Schools, NM \$91,727 00 Alabama Contracts \$131,551 00 University of Alabama at Birmingham \$175,309 00 University of Alabama at Birmingham \$49,669 00 Atlanta Public Schools Career Technical Off \$552 00 Arkansas Literacy/Math Design Collaborative \$1,466 00 Camdenton Schools, Missouri \$111,420 00 Council for Collegiate Nursing \$147,154 00 Compact Faculty Institute \$893,673 00 Compact for Faculty Diversity \$502,975 00 MUNICIPAL SCHOOLS OF CLOVIS NM \$37,208 00 LDC/MDC Open-Invitation Conference \$217,337 00 Contracted Professional Development Services \$172,539 00 Advancing Common Core Standards, Educator Eff \$100,024 00 Direct2Degree Kentucky \$36,705 00 Dale County Board of Education \$49,710 00 Dooly County School District \$45,725 00 Dover High School \$20,251 00 Dawson Education Service Cooperative, AR \$15,428 00 Dalton Public Schools GA \$48,213 00 Direct Services Developmental \$41,958 00 Distance Learning Policy Laboratory \$4,392 00 Dothan City Schools, Alabama \$116,962 00 Doctoral Scholars Professional Dev \$8,875 00 Fulton County School District Small Learning \$1 00 Florida Atlantic University \$1,218 00 State of Florida Department of Education \$98,870 00 State of Florida DOE \$175,973 00 Camden County GA Public Schools \$69,279 00 Georgia Contracts \$92,754 00 Greene County School GA \$9,499 00 Geneva County Board of Education \$33,643 00 Gwinnett County Schools, GA \$183,308 00 General Fund \$1,506,609 00 Go Alliance \$283,758 00 Collaborative Counselor Training Initiative \$105,623 00 Heart of Georgia College and Career Academy \$2,804 00 State of Pennsylvania \$24,049 00 IT Technology Fund \$224 00 Jefferson County Alabama \$185,040 00 Jefferson County Public Schoooks, Kentucky \$221,274 00 Kentucky Department of Education \$14,358 00 Kentucky Louisville Middle Schools \$261,903 00 Louisiana High School Redesign Initiative \$203,528 00 Louisiana Voc Tech \$3,153 00 Leadership State Initiatives \$154,939 00 Lumina Foundation for Education \$112,127 00 The Springfield Public Schools \$361,664 00 Meriwether County Public Schools GA \$(1 00)Muscogee County Schools, Georgia \$50,231 00 Doctoral Scholars Program \$155 00 Middle Grades Consortium \$157,828 00 Bd of Sch Commissioners of Mobile County, Al \$147,539 00 Kansas City Missouri School District \$1,950 00 Mississippi Contracted Sites \$195,817 00 Nat'l Assessment Ed Progress \$162,000 00 NASA 2 \$5,556 00 NASA Office of Education \$1,660 00 National Board for Professional Teaching Stan \$13,936 00 Hoke County Schools, NC \$52,633 00 North Carolina Lenior County Schools \$657 00 North Carolina Roanoke Rapids \$15,746 00 Turtle Mountain high School ND \$6,401 00 North East Florida Consortium of Schools \$63,242 00 New Jersey East Orange School District \$154,984 00 Albuquerque Public Schools, New Mexico \$30,793 00 New Mexico Cooperative Educational Services \$9,531 00 New Orleans Urban Initiative \$7,574 00 National Research Center Customize Profession \$149,597 00 National Research Center Conf Presentations \$25,310 00 National Research Center Manhattan Strategy \$48,372 00 National Research New Mexico Cooperative Edu \$39,121 00 Newark Public Schools, NJ \$36,443 00 Prince George County Public Schools MD \$44,674 00 Lumina for Education National State Authoriza \$37,911 00 Lumina Foundation/Western Interstate Comm \$68,557 00 National Council State Authorization Recipro \$343,258 00 National-Staff Devel Project \$76,768 00 Buffalo Public Schools \$248,771 00 New York City Small Learning Communities \$188,283 00 Great Oaks Career Centers \$441 00 Oklahoma Department of Education \$1,354 00 Pinellas County Schools \$40,636 00 Quitman County School District \$30,543 00 Richland County School District One, SC \$156,915 00 Robeson County Public Schools, NC \$132,261 00 Randolph County Schools, GA \$64,057 00 Gates - State Authorizaiton Reciprocity Agree \$28,360 00 South Carolina Department of Education \$9,693 00 South Carolina Jasper county Schools \$93,532 00 South Carolina Department of Education \$136,524 00 Sumter County School District \$117,794 00 Union County School District \$89,279 00 SC Williamsburg County School District \$154,351 00 State Educa-Tech Co-Operative \$100,470 00 Technology Centers That Work \$513,105 00 Technology Centers Alabama \$97,194 00 Technology Centers that Work Kentucky \$56,993 00 State of Pennsylvania \$376,869 00 Tennessee First to the Top Schools \$163,126 00 Metropolitan Government of Nashville \$250,832 00 Dalewood Middle School \$20,706 00 Trenton Public School System \$1 00 Texas Enhanced Network \$408,194 00 Texas San Antonio Independent School District \$170,955 00 US Prep National \$7,541 00 Virginia Project Based Learning \$21,050 00 Vocational Education Consortium \$325,776 00 Voc Ed Summer Conference Proj \$846,698 00 WICHE Pass \$1,298 00 Washington State Department of Education \$20,065 00 WV High Schools, Tech Centers & Advanced Car \$245,582 00 West Virginia Center for Professional Develop \$151 00 WV Literacy/Math Design Collaborative \$54,272 00 West Virginia STEM Benedum Foundation \$86,193 00 Wetzel County School District \$82,441 00 YouScience, LLC \$17,248 00 |              |            |                        |             |              |

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

| (A)<br>Name and Title                       | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|---------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                             |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| Alan Baker<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Asa Hutchinson<br>.....<br>Chair            | 0 00<br>.....                                                                              | X                                                                                                         |                       | X       |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Beth Gorn Cox<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Bill Haslam<br>.....<br>Board Member        | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Caroline Novak<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Chns Saxman<br>.....<br>Board Member        | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Clark Jolley<br>.....<br>Board Member       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Daniel Branch<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Darryl M Scott<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| David P Sokola<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Demck Graham<br>.....<br>Board Member       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Donnie Whitten<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Dr Adeniyi Ojutiku<br>.....<br>Board Member | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Earl Ray Tomblin<br>.....<br>Board Member   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Enk Fresen<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Glenda Scales<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Greg Abbott<br>.....<br>Board Member        | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Harry Ray Brooks<br>.....<br>Board Member   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Jack Hill<br>.....<br>Board Member          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Jennifer Monies<br>.....<br>Board Member    | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Joe H Pickens<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| John C White<br>.....<br>Board Member       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| John Legg<br>.....<br>Board Member          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Joseph U Meyer<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Joyce Elliott<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

| (A)<br>Name and Title                        | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099- MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099- MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|----------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                              |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                        |                                                                             |                                                                                               |
| Knssy DeAlejandro<br>.....<br>Board Member   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Larry Hogan<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Mary Fallin<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Michael Williams<br>.....<br>Board Member    | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Mitchell Zais<br>.....<br>Board Member       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Nancy C Detert<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Nathan Deal<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Nikki G Setzler<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Nikki Haley<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Pat McCrory<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Paul Hill<br>.....<br>Board Member           | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Phil Bryant<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Rick Scott<br>.....<br>Board Member          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Rob Eissler<br>.....<br>Board Member         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Robert Bentley<br>.....<br>Board Member      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Robert H Plymale<br>.....<br>Treasurer       | 0 00<br>.....                                                                              | X                                                                                                         |                       | X       |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Robert W Rescigno<br>.....<br>Board Member   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Roman W Prezioso Jr<br>.....<br>Board Member | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Terry Burton<br>.....<br>Board Member        | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Terry England<br>.....<br>Board Member       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Terry McAuliffe<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Thomas W Campbell<br>.....<br>Board Member   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Tommy Bice<br>.....<br>Board Member          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Videt Carmichael<br>.....<br>Board Member    | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| Wayne D Andrews<br>.....<br>Board Member     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |



| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                       |                                                                            |                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|-----------------------------------------------------------------------|----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| (A)<br>Name and Title                                                                                                                         | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|                                                                                                                                               |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                       |                                                                            |                                                                                               |
| Chuck Smith<br>.....<br>Board Member                                                                                                          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Teresa Inman<br>.....<br>Board Member                                                                                                         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Steven H Godowsky<br>.....<br>Board Member                                                                                                    | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Enn Hames<br>.....<br>Board Member                                                                                                            | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Matt Bevin<br>.....<br>Board Member                                                                                                           | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| John Bel Edwards<br>.....<br>Board Member                                                                                                     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Monty Sullivan<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Cynthia Hedge-Morrell<br>.....<br>Board Member                                                                                                | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| James D Fielder<br>.....<br>Board Member                                                                                                      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Jack R Smith<br>.....<br>Board Member                                                                                                         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Robert L Caret<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Charles L Hamson<br>.....<br>Board Member                                                                                                     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Tamara Barringer<br>.....<br>Board Member                                                                                                     | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Brandon Gosey<br>.....<br>Board Member                                                                                                        | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Tom Friedemann<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| L Anthony Wise<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| R Edward Houck<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Matt Arthur<br>.....<br>Board Member                                                                                                          | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Johnnie Roebuck<br>.....<br>Board Member                                                                                                      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Jack Markell<br>.....<br>Board Member                                                                                                         | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Francis C Thompson<br>.....<br>Board Member                                                                                                   | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Linda P Johnson<br>.....<br>Board Member                                                                                                      | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Glen D Johnson<br>.....<br>Vice Chair                                                                                                         | 0 00<br>.....                                                                              | X                                                                                                         |                       | X       |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Melanie Barton<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |
| Jimmie Don Aycock<br>.....<br>Board Member                                                                                                    | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                     | 0                                                                          | 0                                                                                             |

| Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors |                                                                                            |                                                                                                           |                       |         |              |                              |        |                                                                        |                                                                             |                                                                                               |
|-----------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------|--------------|------------------------------|--------|------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| (A)<br>Name and Title                                                                                                                         | (B)<br>Average hours per week (list any hours for related organizations below dotted line) | (C)<br>Position (do not check more than one box, unless person is both an officer and a director/trustee) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W- 2/1099- MISC) | (E)<br>Reportable compensation from related organizations (W- 2/1099- MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|                                                                                                                                               |                                                                                            | Individual trustee or director                                                                            | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                        |                                                                             |                                                                                               |
| Janet D Howell<br>.....<br>Board Member                                                                                                       | 0 00<br>.....                                                                              | X                                                                                                         |                       |         |              |                              |        | 0                                                                      | 0                                                                           | 0                                                                                             |
| David Spence<br>.....<br>President                                                                                                            | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 233,400                                                                | 0                                                                           | 30,630                                                                                        |
| James E Bottoms<br>.....<br>Senior Vice President                                                                                             | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 200,000                                                                | 0                                                                           | 20,420                                                                                        |
| Andy Baxter<br>.....<br>VP-Educator Effect                                                                                                    | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 150,000                                                                | 0                                                                           | 27,540                                                                                        |
| Joan Lord<br>.....<br>VP-EDUCATION POLICY                                                                                                     | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 146,333                                                                | 0                                                                           | 14,710                                                                                        |
| Cheryl Blanco<br>.....<br>VP Special Projects                                                                                                 | 18 13<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 129,346                                                                | 0                                                                           | 12,330                                                                                        |
| Gale Gaines<br>.....<br>VP - STATE SERVICES                                                                                                   | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 124,829                                                                | 0                                                                           | 13,450                                                                                        |
| Eula Aiken<br>.....<br>EXECUTIVE DIRECTOR                                                                                                     | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 110,000                                                                | 0                                                                           | 14,930                                                                                        |
| Tncia Avery<br>.....<br>HR Director                                                                                                           | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 113,467                                                                | 0                                                                           | 23,040                                                                                        |
| Barbara Channell<br>.....<br>CFO                                                                                                              | 36 25<br>.....                                                                             |                                                                                                           |                       | X       |              |                              |        | 108,667                                                                | 0                                                                           | 15,240                                                                                        |
| Robert Scott Warren<br>.....<br>DIR-State InitiativeS                                                                                         | 36 25<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 146,250                                                                | 0                                                                           | 15,020                                                                                        |
| Steve Broome<br>.....<br>Dir-State Development                                                                                                | 36 25<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 152,667                                                                | 0                                                                           | 35,860                                                                                        |
| JAMES STONE III<br>.....<br>Director, National Research Center                                                                                | 36 25<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 195,000                                                                | 0                                                                           | 19,810                                                                                        |
| John Buchanan<br>.....<br>school improvement consultant                                                                                       | 36 25<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 150,000                                                                | 0                                                                           | 4,550                                                                                         |
| Laun Johnson<br>.....<br>Director, School Leader Development                                                                                  | 36 25<br>.....                                                                             |                                                                                                           |                       |         |              | X                            |        | 128,000                                                                | 0                                                                           | 12,000                                                                                        |

SCHEDULE A  
(Form 990 or 990EZ)

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.  
▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047  
**2015**  
Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization  
BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION

Employer identification number  
58-0566141

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 described in **section 170(b)(1)(A)(i).**
- 2

☐

A school described in **section 170(b)(1)(A)(ii).**(Attach Schedule E (Form 990 or 990-EZ))
- 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 in lines 11a through 11d that describes the type of supporting organization and complete lines 11e, 11f, and 11g
- a

☐

**Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**
- b

☐

**Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**
- c

☐

**Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**
- d

☐

**Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**
- e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization
- f

Enter the number of supported organizations . . . . .
- g

Provide the following information about the supported organization(s)

| (i)<br>Name of supported organization | (ii)EIN | (iii)<br>Type of organization<br>(described on lines 1- 9 above (see instructions)) | (iv)<br>Is the organization listed in your governing document? |    | (v)<br>Amount of monetary support (see instructions) | (vi)<br>Amount of other support (see instructions) |
|---------------------------------------|---------|-------------------------------------------------------------------------------------|----------------------------------------------------------------|----|------------------------------------------------------|----------------------------------------------------|
|                                       |         |                                                                                     | Yes                                                            | No |                                                      |                                                    |
|                                       |         |                                                                                     |                                                                |    |                                                      |                                                    |
|                                       |         |                                                                                     |                                                                |    |                                                      |                                                    |
|                                       |         |                                                                                     |                                                                |    |                                                      |                                                    |
| Total                                 |         |                                                                                     |                                                                |    |                                                      |                                                    |

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)  
(Complete only if you checked the box on line 5, 7, or 8 of Part I 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<br>(or fiscal year beginning in) ►                                                                                                                                                      | (a)2011 | (b)2012 | (c)2013 | (d)2014 | (e)2015 | (f)Total |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|----------|
| 1 Gifts, grants, contributions, and membership fees received (Do not include any unusual grants.)                                                                                                     |         |         |         |         |         |          |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf                                                                                                     |         |         |         |         |         |          |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge                                                                                             |         |         |         |         |         |          |
| 4 Total. Add lines 1 through 3                                                                                                                                                                        |         |         |         |         |         |          |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) |         |         |         |         |         |          |
| 6 Public support. Subtract line 5 from line 4                                                                                                                                                         |         |         |         |         |         |          |

Section B. Total Support

| Calendar year<br>(or fiscal year beginning in) ►                                                                                 | (a)2011 | (b)2012 | (c)2013 | (d)2014 | (e)2015 | (f)Total |
|----------------------------------------------------------------------------------------------------------------------------------|---------|---------|---------|---------|---------|----------|
| 7 Amounts from line 4                                                                                                            |         |         |         |         |         |          |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources |         |         |         |         |         |          |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on                             |         |         |         |         |         |          |
| 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)                               |         |         |         |         |         |          |
| 11 Total support. Add lines 7 through 10                                                                                         |         |         |         |         |         |          |

12 Gross receipts from related activities, etc. (see instructions)

12

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

Section C. Computation of Public Support Percentage

|                                                                                           |    |
|-------------------------------------------------------------------------------------------|----|
| 14 Public support percentage for 2015 (line 6, column (f) divided by line 11, column (f)) | 14 |
| 15 Public support percentage for 2014 Schedule A, Part II, line 14                        | 15 |

16a 33 1/3% support test—2015.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—2014.If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization

17a 10%-facts-and-circumstances test—2015.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 VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization

b 10%-facts-and-circumstances test—2014.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 VI 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 IIISupport Schedule for Organizations Described in Section 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<br>(or fiscal year beginning in) ►                                                                                                                           | (a)2011    | (b)2012    | (c)2013    | (d)2014    | (e)2015    | (f)Total    |
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")                                                                        | 5,350,471  | 4,100,491  | 4,899,585  | 3,682,282  | 3,863,629  | 21,896,458  |
| 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 | 20,470,103 | 19,621,870 | 21,990,589 | 21,321,773 | 27,695,676 | 111,100,011 |
| 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                                                                                                                                             | 25,820,574 | 23,722,361 | 26,890,174 | 25,004,055 | 31,559,305 | 132,996,469 |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons                                                                                                |            |            |            |            |            | 0           |
| 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           | 7,019,176  | 7,732,132  | 10,717,000 | 10,605,610 | 16,644,809 | 52,718,727  |
| c Add lines 7a and 7b                                                                                                                                                      | 7,019,176  | 7,732,132  | 10,717,000 | 10,605,610 | 16,644,809 | 52,718,727  |
| 8 Public support. (Subtract line 7c from line 6.)                                                                                                                          |            |            |            |            |            | 80,277,742  |

| Section B. Total Support                                                                                                                                                                                   |            |            |            |            |            |             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------|------------|------------|------------|-------------|
| Calendar year<br>(or fiscal year beginning in) ►                                                                                                                                                           | (a)2011    | (b)2012    | (c)2013    | (d)2014    | (e)2015    | (f)Total    |
| 9 Amounts from line 6                                                                                                                                                                                      | 25,820,574 | 23,722,361 | 26,890,174 | 25,004,055 | 31,559,305 | 132,996,469 |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                                                         | 148,405    | 128,577    | 149,020    | 270,445    | 325,247    | 1,021,694   |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                                                                                                  |            |            |            |            |            |             |
| c Add lines 10a and 10b                                                                                                                                                                                    | 148,405    | 128,577    | 149,020    | 270,445    | 325,247    | 1,021,694   |
| 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 VI.)                                                                                                         |            |            |            |            |            |             |
| 13 Total support. (Add lines 9, 10c, 11, and 12.)                                                                                                                                                          | 25,968,979 | 23,850,938 | 27,039,194 | 25,274,500 | 31,884,552 | 134,018,163 |
| 14 First five years.If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ► <input type="checkbox"/> |            |            |            |            |            |             |

| Section C. Computation of Public Support Percentage                                       |    |          |
|-------------------------------------------------------------------------------------------|----|----------|
| 15 Public support percentage for 2015 (line 8, column (f) divided by line 13, column (f)) | 15 | 59.900 % |
| 16 Public support percentage from 2014 Schedule A, Part III, line 15                      | 16 | 65.040 % |

| Section D. Computation of Investment Income Percentage                                                                                                                                                                                                                                           |    |         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|---------|
| 17 Investment income percentage for 2015 (line 10c, column (f) divided by line 13, column (f))                                                                                                                                                                                                   | 17 | 0.760 % |
| 18 Investment income percentage from 2014 Schedule A, Part III, line 17                                                                                                                                                                                                                          | 18 | 0.720 % |
| 19a 33 1/3% support tests—2015.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 ► <input checked="" type="checkbox"/> |    |         |
| b 33 1/3% support tests—2014.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 ► <input type="checkbox"/>     |    |         |
| 20 Private foundation.If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ► <input type="checkbox"/>                                                                                                                                            |    |         |

Part IV Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.                                                                                                                                                                                                         | 1   |    |
| 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).                                                                                                                                                                                                                                      | 2   |    |
| 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.                                                                                                                                                                                                                                                                                                                                                                                       | 3a  |    |
| b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.                                                                                                                                                                                                                                                    | 3b  |    |
| c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.                                                                                                                                                                                                                                                                                             | 3c  |    |
| 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.                                                                                                                                                                                                                                                                                                                                         | 4a  |    |
| b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.                                                                                                                                                                                                        | 4b  |    |
| c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.                                                                                                                                                                           | 4c  |    |
| 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document). | 5a  |    |
| b <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?                                                                                                                                                                                                                                                                                                                                                           | 5b  |    |
| c <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?                                                                                                                                                                                                                                                                                                                                                                                                                  | 5c  |    |
| 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations, (b) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .                                                     | 6   |    |
| 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).                                                                                                                                                                                              | 7   |    |
| 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part II of Schedule L (Form 990).                                                                                                                                                                                                                                                                                                                                                       | 8   |    |
| 9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .                                                                                                                                                                                                                              | 9a  |    |
| b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .                                                                                                                                                                                                                                                                                                                | 9b  |    |
| c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .                                                                                                                                                                                                                                                                                     | 9c  |    |
| 10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer b below.                                                                                                                                                                                                                                                             | 10a |    |
| b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)                                                                                                                                                                                                                                                                                                                                                   | 10b |    |
| 11 Has the organization accepted a gift or contribution from any of the following persons?                                                                                                                                                                                                                                                                                                                                                                                                                                   |     |    |
| a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?                                                                                                                                                                                                                                                                                                                                                        | 11a |    |
| b A family member of a person described in (a) above?                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 11b |    |
| c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.                                                                                                                                                                                                                                                                                                                                                                                                      | 11c |    |

Part IV

Supporting Organizations (continued)

Section B. Type I Supporting Organizations

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <div>1</div> <div>Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year?<br/><i>If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i></div> |     |    |
| <div>2</div> <div>Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization?<br/><i>If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i></div>                                                                                                                                                                                                                                                                              |     |    |

Section C. Type II Supporting Organizations

|                                                                                                                                                                                                                                                                                                                                                                                                                | Yes | No |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <div>1</div> <div>Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)?<br/><i>If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i></div> |     |    |

Section D. All Type III Supporting Organizations

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <div>1</div> <div>Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?</div> |     |    |
| <div>2</div> <div>Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization?<br/><i>If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).</i></div>                                                                                                         |     |    |
| <div>3</div> <div>By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year?<br/><i>If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.</i></div>                                                                            |     |    |

Section E. Type III Functionally-Integrated Supporting Organizations

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |     |    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <div>1</div> <div>Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)</div> <div><div>a</div><div><input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.</div></div> <div><div>b</div><div><input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.</div></div> <div><div>c</div><div><input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).</div></div> |     |    |
| <div>2</div> <div>Activities Test. Answer (a) and (b) below.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Yes | No |
| <div>a</div> <div>Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive?<br/><i>If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i></div>                                                                                            |     |    |
| <div>b</div> <div>Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in?<br/><i>If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i></div>                                                                                                                                                                                                                         |     |    |
| <div>3</div> <div>Parent of Supported Organizations. Answer (a) and (b) below.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |     |    |
| <div>a</div> <div>Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                             |     |    |
| <div>b</div> <div>Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.</div>                                                                                                                                                                                                                                                                                                                                                                                                 |     |    |

**Part V**    **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

**1**    Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970: **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E. ☐

| Section A - Adjusted Net Income |                                                                                                                                                                                                          | (A) Prior Year | (B) Current Year (optional) |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------------------|
| <b>1</b>                        | Net short-term capital gain                                                                                                                                                                              | <b>1</b>       |                             |
| <b>2</b>                        | Recoveries of prior-year distributions                                                                                                                                                                   | <b>2</b>       |                             |
| <b>3</b>                        | Other gross income (see instructions)                                                                                                                                                                    | <b>3</b>       |                             |
| <b>4</b>                        | Add lines 1 through 3                                                                                                                                                                                    | <b>4</b>       |                             |
| <b>5</b>                        | Depreciation and depletion                                                                                                                                                                               | <b>5</b>       |                             |
| <b>6</b>                        | Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | <b>6</b>       |                             |
| <b>7</b>                        | Other expenses (see instructions)                                                                                                                                                                        | <b>7</b>       |                             |
| <b>8</b>                        | <b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)                                                                                                                                       | <b>8</b>       |                             |

| Section B - Minimum Asset Amount |                                                                                                                                | (A) Prior Year | (B) Current Year (optional) |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------------------|
| <b>1</b>                         | Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year) | <b>1</b>       |                             |
| <b>a</b>                         | Average monthly value of securities                                                                                            | <b>1a</b>      |                             |
| <b>b</b>                         | Average monthly cash balances                                                                                                  | <b>1b</b>      |                             |
| <b>c</b>                         | Fair market value of other non-exempt-use assets                                                                               | <b>1c</b>      |                             |
| <b>d</b>                         | <b>Total</b> (add lines 1a, 1b, and 1c)                                                                                        | <b>1d</b>      |                             |
| <b>e</b>                         | <b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI) _____                                     |                |                             |
| <b>2</b>                         | Acquisition indebtedness applicable to non-exempt use assets                                                                   | <b>2</b>       |                             |
| <b>3</b>                         | Subtract line 2 from line 1d                                                                                                   | <b>3</b>       |                             |
| <b>4</b>                         | Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)                                 | <b>4</b>       |                             |
| <b>5</b>                         | Net value of non-exempt-use assets (subtract line 4 from line 3)                                                               | <b>5</b>       |                             |
| <b>6</b>                         | Multiply line 5 by .035                                                                                                        | <b>6</b>       |                             |
| <b>7</b>                         | Recoveries of prior-year distributions                                                                                         | <b>7</b>       |                             |
| <b>8</b>                         | <b>Minimum Asset Amount</b> (add line 7 to line 6)                                                                             | <b>8</b>       |                             |

| Section C - Distributable Amount |                                                                                                                                                                          | Current Year |  |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|--|
| <b>1</b>                         | Adjusted net income for prior year (from Section A, line 8, Column A)                                                                                                    | <b>1</b>     |  |
| <b>2</b>                         | Enter 85% of line 1                                                                                                                                                      | <b>2</b>     |  |
| <b>3</b>                         | Minimum asset amount for prior year (from Section B, line 8, Column A)                                                                                                   | <b>3</b>     |  |
| <b>4</b>                         | Enter greater of line 2 or line 3                                                                                                                                        | <b>4</b>     |  |
| <b>5</b>                         | Income tax imposed in prior year                                                                                                                                         | <b>5</b>     |  |
| <b>6</b>                         | <b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)                                             | <b>6</b>     |  |
| <b>7</b>                         | Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions) <input type="checkbox"/> |              |  |



Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

| Section D - Distributions                                                                                                                  | Current Year |
|--------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| 1 Amounts paid to supported organizations to accomplish exempt purposes                                                                    |              |
| 2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity    |              |
| 3 Administrative expenses paid to accomplish exempt purposes of supported organizations                                                    |              |
| 4 Amounts paid to acquire exempt-use assets                                                                                                |              |
| 5 Qualified set-aside amounts (prior IRS approval required)                                                                                |              |
| 6 Other distributions (describe in Part VI) See instructions                                                                               |              |
| 7 Total annual distributions. Add lines 1 through 6                                                                                        |              |
| 8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions |              |
| 9 Distributable amount for 2015 from Section C, line 6                                                                                     |              |
| 10 Line 8 amount divided by Line 9 amount                                                                                                  |              |

| Section E - Distribution Allocations (see instructions)                                                                                             | (i)<br>Excess Distributions | (ii)<br>Underdistributions<br>Pre-2015 | (iii)<br>Distributable<br>Amount for 2015 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|----------------------------------------|-------------------------------------------|
| 1 Distributable amount for 2015 from Section C, line 6                                                                                              |                             |                                        |                                           |
| 2 Underdistributions, if any, for years prior to 2015 (reasonable cause required--see instructions)                                                 |                             |                                        |                                           |
| 3 Excess distributions carryover, if any, to 2015                                                                                                   |                             |                                        |                                           |
| a                                                                                                                                                   |                             |                                        |                                           |
| b                                                                                                                                                   |                             |                                        |                                           |
| c                                                                                                                                                   |                             |                                        |                                           |
| d From 2013. . . . .                                                                                                                                |                             |                                        |                                           |
| e From 2014. . . . .                                                                                                                                |                             |                                        |                                           |
| f Total of lines 3a through e                                                                                                                       |                             |                                        |                                           |
| g Applied to underdistributions of prior years                                                                                                      |                             |                                        |                                           |
| h Applied to 2015 distributable amount                                                                                                              |                             |                                        |                                           |
| i Carryover from 2010 not applied (see instructions)                                                                                                |                             |                                        |                                           |
| j Remainder Subtract lines 3g, 3h, and 3i from 3f                                                                                                   |                             |                                        |                                           |
| 4 Distributions for 2015 from Section D, line 7 \$                                                                                                  |                             |                                        |                                           |
| a Applied to underdistributions of prior years                                                                                                      |                             |                                        |                                           |
| b Applied to 2015 distributable amount                                                                                                              |                             |                                        |                                           |
| c Remainder Subtract lines 4a and 4b from 4                                                                                                         |                             |                                        |                                           |
| 5 Remaining underdistributions for years prior to 2015, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions) |                             |                                        |                                           |
| 6 Remaining underdistributions for 2015 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)                        |                             |                                        |                                           |
| 7 Excess distributions carryover to 2016. Add lines 3j and 4c                                                                                       |                             |                                        |                                           |
| 8 Breakdown of line 7                                                                                                                               |                             |                                        |                                           |
| a                                                                                                                                                   |                             |                                        |                                           |
| b                                                                                                                                                   |                             |                                        |                                           |
| c Excess from 2013. . . . .                                                                                                                         |                             |                                        |                                           |
| d From 2014. . . . .                                                                                                                                |                             |                                        |                                           |
| e From 2015. . . . .                                                                                                                                |                             |                                        |                                           |

**Part VI**   **Supplemental Information.**

Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

**Facts And Circumstances Test**

Return Reference

Explanation

SCHEDULE D  
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2015

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

► Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
► Attach to Form 990.  
Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

|                                                                                 |                                              |
|---------------------------------------------------------------------------------|----------------------------------------------|
| Name of the organization<br>BOARD OF CONTROL FOR SOUTHERN<br>REGIONAL EDUCATION | Employer identification number<br>58-0566141 |
|---------------------------------------------------------------------------------|----------------------------------------------|

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

|   |                                                                                                                                                                                                                                                                                                                                         |                              |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
|   | (a) Donor advised funds                                                                                                                                                                                                                                                                                                                 | (b) Funds and other accounts |
| 1 | Total number at end of year                                                                                                                                                                                                                                                                                                             |                              |
| 2 | Aggregate value of contributions to (during year)                                                                                                                                                                                                                                                                                       |                              |
| 3 | Aggregate value of 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? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>                                                            |                              |
| 6 | Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div> |                              |

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

|   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |    |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| 1 | Purpose(s) of conservation easements held by the organization (check all that apply) <div><input type="checkbox"/> Preservation of land for public use (e.g., recreation or education)<div><input type="checkbox"/> Protection of natural habitat <input type="checkbox"/> Preservation of open space</div><input type="checkbox"/> Preservation of an historically important land area <input type="checkbox"/> Preservation of a certified historic structure</div> |    |
| 2 | Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year                                                                                                                                                                                                                                                                                                    |    |
| 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, and not on a historic structure listed in the National Register                                                                                                                                                                                                                                                                                                                              | 2d |
| 3 | Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ►                                                                                                                                                                                                                                                                                                                               |    |
| 4 | Number of states where property subject to conservation easement is located ►                                                                                                                                                                                                                                                                                                                                                                                         |    |
| 5 | Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>                                                                                                                                                                                                                        |    |
| 6 | Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year<br>►                                                                                                                                                                                                                                                                                                                        |    |
| 7 | Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year<br>► \$                                                                                                                                                                                                                                                                                                                           |    |
| 8 | Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>                                                                                                                                                                                                                                                     |    |
| 9 | In Part XIII, 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" on Form 990, Part IV, line 8.

|      |                                                                                                                                                                                                                                                                                                                                                                                      |      |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|
| 1a   | If the organization elected, as permitted under SFAS 116 (ASC 958), 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 XIII, the text of the footnote to its financial statements that describes these items |      |
| b    | If the organization elected, as permitted under SFAS 116 (ASC 958), 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)  | Revenue included on 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 (ASC 958) relating to these items                                                                                                                                                          |      |
| a    | Revenue included on Form 990, Part VIII, line 1                                                                                                                                                                                                                                                                                                                                      | ► \$ |
| b    | Assets included in Form 990, Part X                                                                                                                                                                                                                                                                                                                                                  | ► \$ |

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

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

**d** ☐ Loan or exchange programs

**b** ☐ Scholarly research

**e** ☐ Other

**c** ☐ Preservation for future generations
- 4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII
- 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" on 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 XIII and complete the following table

|                                        | Amount    |
|----------------------------------------|-----------|
| <b>c</b> Beginning balance             | <b>1c</b> |
| <b>d</b> Additions during the year     | <b>1d</b> |
| <b>e</b> Distributions during the year | <b>1e</b> |
| <b>f</b> Ending balance                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ **Yes** ☐ **No**
- b** If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII ☐

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

|                                                                   | (a)Current year | (b)Prior year | b (c)Two years back | (d)Three years back | (e)Four years back |
|-------------------------------------------------------------------|-----------------|---------------|---------------------|---------------------|--------------------|
| <b>1a</b> Beginning of year balance . . . . .                     | 25,112          | 25,099        | 25,080              | 25,006              | 24,933             |
| <b>b</b> Contributions . . . . .                                  |                 |               |                     |                     |                    |
| <b>c</b> Net investment earnings, gains, and losses               | 10              | 13            | 19                  | 74                  | 73                 |
| <b>d</b> Grants or scholarships . . . . .                         |                 |               |                     |                     |                    |
| <b>e</b> Other expenditures for facilities and programs . . . . . |                 |               |                     |                     |                    |
| <b>f</b> Administrative expenses . . . . .                        |                 |               |                     |                     |                    |
| <b>g</b> End of year balance . . . . .                            | 25,122          | 25,112        | 25,099              | 25,080              | 25,006             |

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a** Board designated or quasi-endowment ▶ 16 410 %

**b** Permanent endowment ▶ 83 590 %

**c** Temporarily restricted endowment ▶ 0 %
- The percentages on lines 2a, 2b, and 2c should equal 100%
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by
- (i)** unrelated organizations . . . . .

**(ii)** related organizations . . . . .
- |               |            |           |
|---------------|------------|-----------|
|               | <b>Yes</b> | <b>No</b> |
| <b>3a(i)</b>  |            | No        |
| <b>3a(ii)</b> |            | No        |
| <b>3b</b>     |            |           |
- b** If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . .
- 4** Describe in Part XIII the intended uses of the organization's endowment funds

**Part VI Land, Buildings, and Equipment.**  
Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. 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 |
|---------------------------------------------------------------------------------------------------------------------|-------------------------------------|--------------------------------|-----------------------------|---------------|
| <b>1a</b> Land . . . . .                                                                                            |                                     |                                |                             |               |
| <b>b</b> Buildings . . . . .                                                                                        |                                     | 1,625,000                      | 975,000                     | 650,000       |
| <b>c</b> Leasehold improvements . . . . .                                                                           |                                     | 1,006,609                      | 680,710                     | 325,899       |
| <b>d</b> Equipment . . . . .                                                                                        |                                     | 729,793                        | 622,299                     | 107,494       |
| <b>e</b> Other . . . . .                                                                                            |                                     |                                |                             |               |
| <b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c) ) . . . . . ▶ |                                     |                                |                             | 1,083,393     |



**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**  
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

|          |                                                                                                         |           |            |
|----------|---------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Total revenue, gains, and other support per audited financial statements . . . . .                      | <b>1</b>  | 32,145,948 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part VIII, line 12                                      |           |            |
| <b>a</b> | Net unrealized gains (losses) on investments . . . . .                                                  | <b>2a</b> | 309,393    |
| <b>b</b> | Donated services and use of facilities . . . . .                                                        | <b>2b</b> |            |
| <b>c</b> | Recoveries of prior year grants . . . . .                                                               | <b>2c</b> |            |
| <b>d</b> | Other (Describe in Part XIII )<br>. . . . .                                                             | <b>2d</b> |            |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .                                                         | <b>2e</b> | 309,393    |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .                                                    | <b>3</b>  | 31,836,555 |
| <b>4</b> | Amounts included on Form 990, Part VIII, line 12, but not on line <b>1</b>                              |           |            |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                              | <b>4a</b> | 47,997     |
| <b>b</b> | Other (Describe in Part XIII ) . . . . .                                                                | <b>4b</b> |            |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .                                                             | <b>4c</b> | 47,997     |
| <b>5</b> | Total revenue Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12 ) . . . . . | <b>5</b>  | 31,884,552 |

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**  
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

|          |                                                                                                          |           |            |
|----------|----------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Total expenses and losses per audited financial statements . . . . .                                     | <b>1</b>  | 32,414,325 |
| <b>2</b> | Amounts included on line 1 but not on Form 990, Part IX, line 25                                         |           |            |
| <b>a</b> | Donated services and use of facilities . . . . .                                                         | <b>2a</b> |            |
| <b>b</b> | Prior year adjustments . . . . .                                                                         | <b>2b</b> |            |
| <b>c</b> | Other losses . . . . .                                                                                   | <b>2c</b> |            |
| <b>d</b> | Other (Describe in Part XIII ) . . . . .                                                                 | <b>2d</b> |            |
| <b>e</b> | Add lines <b>2a</b> through <b>2d</b> . . . . .                                                          | <b>2e</b> | 0          |
| <b>3</b> | Subtract line <b>2e</b> from line <b>1</b> . . . . .                                                     | <b>3</b>  | 32,414,325 |
| <b>4</b> | Amounts included on Form 990, Part IX, line 25, but not on line <b>1</b> :                               |           |            |
| <b>a</b> | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                               | <b>4a</b> | 47,997     |
| <b>b</b> | Other (Describe in Part XIII ) . . . . .                                                                 | <b>4b</b> |            |
| <b>c</b> | Add lines <b>4a</b> and <b>4b</b> . . . . .                                                              | <b>4c</b> | 47,997     |
| <b>5</b> | Total expenses Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18 ) . . . . . | <b>5</b>  | 32,462,322 |

**Part XIII Supplemental Information**

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

| Return Reference | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Part V, Line 4   | The income earned from the endowment funds are used to award outstanding educators in the SREB member states                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Part X, Line 2   | The Board is exempt from income taxes under Section 501(c)(3) of the U S Internal Revenue Code and is classified as an organization which is not a private foundation under Section 509(a) of the U S Internal Revenue Code. Management does not believe there are any uncertain tax positions as defined by FASB ASC 740, Income Taxes. The Board could be subject to income tax examinations for its U S federal tax filings for the current tax year and previous filings for fiscal years 2015, 2014 and 2013 still open under the statute of limitations |
|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

[illegible]

# 2015

58-0566141

☒ Yes      ☐ No

## Schedule I (Form 990) 2015



Part III

Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22  
Part III can be duplicated 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. Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

| Return Reference | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Part I, Line 2   | SREB uses an Excel spreadsheet to monitor the fiscal and program health of the SEA sub-grantees. Staff update the primary dashboard after each approved request for funding. When staff input new budget figures, the dashboard refreshes the amount of funds available for allocation - within a state and across the whole initiative. Separate state tabs allow staff to record more detailed information about milestones, goals, and SREB-grantee engagement. SREB maintains digital and print versions of contracts, invoices, and partnership agreements. SREB regularly monitors the performance of SEA sub-grantees. The team reaches out to sub-grantees at least twice monthly. Quarterly, grantees produce a report for SREB review. Every six months, SREB determines whether grantees have completed the work as outlined in the Letters of Agreement. At that time, the Educator Effectiveness team will issue one of three recommendations to grantees: 1. Evidence of Impact Offered. Proceed without Changes. 2. Some Challenges Experienced. Proceed with Changes. 3. Systemic Challenges Found. Approve Corrective Action before Proceeding. The first two recommendations will allow for the drafting of the next Letter of Agreement for the next six months as scheduled. |

Additional Data

Software ID:  
Software Version:  
EIN: 58-0566141  
Name: BOARD OF CONTROL FOR SOUTHERN  
REGIONAL EDUCATION

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

| (a) Name and address of organization or government                                            | (b) EIN    | (c) IRC section if applicable | (d) A mount 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 |
|-----------------------------------------------------------------------------------------------|------------|-------------------------------|---------------------------|-----------------------------------|--------------------------------------------------------|----------------------------------------|------------------------------------|
| Alabama State Department of Education<br>50 North Ripley St PO Box 771<br>MONTGOMERY,AL 36104 | 63-6000619 | GOV                           | 132,656                   | 0                                 |                                                        |                                        | GENERAL OPERATIONAL SUPPORT        |
| Arkansas Department of Education<br>Four Capitol Mall<br>LITTLE ROCK,AR 72201                 | 71-0847443 | GOV                           | 398,316                   | 0                                 |                                                        |                                        | GENERAL OPERATIONAL SUPPORT        |
| Maryland State Department of Education<br>200 W Baltimore St<br>BALTIMORE,MD 21201            | 52-6002033 | GOV                           | 222,570                   |                                   |                                                        |                                        | GENERAL OPERATIONAL SUPPORT        |

**Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.**

| <b>(a)</b> Name and address of organization or government                                        | <b>(b)</b> EIN | <b>(c)</b> IRC section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|--------------------------------------------------------------------------------------------------|----------------|--------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| Mississippi Department of Education<br>PO Box 771<br>JACKSON, MS 39205                           | 64-0897726     | GOV                                  | 212,015                         |                                          |                                                              |                                               | GENERAL OPERATIONAL SUPPORT               |
| North Carolina Department of Public Instruction<br>6301 Mail Service Center<br>Raleigh, NC 27699 | 56-1310675     | GOV                                  | 410,242                         |                                          |                                                              |                                               | GENERAL OPERATIONAL SUPPROT               |
| Oklahoma State Department of Education<br>2500 N Lincoln Boulevard<br>OKLAHOMA CITY, OK 73105    | 73-6017987     | GOV                                  | 68,000                          |                                          |                                                              |                                               | GENERAL OPERATIONAL SUPPORT               |

**Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.**

| <b>(a)</b> Name and address of organization or government                                    | <b>(b)</b> EIN | <b>(c)</b> IRC section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|----------------------------------------------------------------------------------------------|----------------|--------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| South Carolina Department of Education<br>1429 Senate Street<br>COLUMBIA, SC 29201           | 57-6000286     | GOV                                  | 89,500                          |                                          |                                                              |                                               | GENERAL OPERATIONAL SUPPORT               |
| West Virginia Department of Education<br>1900 Kanawha Boulevard East<br>CHARLESTON, WV 25305 | 55-6000768     | GOV                                  | 105,000                         |                                          |                                                              |                                               | GENERAL OPERATIONAL SUPPORT               |

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" on Form 990, Part IV, line 23.  
 ► Attach to Form 990.  
 ► Information about Schedule J (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

2015

Open to Public Inspection

Name of the organization  
BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION

Employer identification number  
58-0566141

Part I

Questions Regarding Compensation

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Yes | No |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <div>1a</div> <div>Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.</div> <div> <div> <input type="checkbox"/> First-class or charter travel                             <input type="checkbox"/> Housing allowance or residence for personal use                         </div> <div> <input type="checkbox"/> Travel for companions                             <input type="checkbox"/> Payments for business use of personal residence                         </div> <div> <input type="checkbox"/> Tax indemnification and gross-up payments                             <input type="checkbox"/> Health or social club dues or initiation fees                         </div> <div> <input type="checkbox"/> Discretionary spending account                             <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef)                         </div> </div> |     |    |
| <div>b</div> <div>If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 1b  |    |
| <div>2</div> <div>Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 2   |    |
| <div>3</div> <div>Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.</div> <div> <div> <input type="checkbox"/> Compensation committee                             <input checked="" type="checkbox"/> Written employment contract                         </div> <div> <input type="checkbox"/> Independent compensation consultant                             <input checked="" type="checkbox"/> Compensation survey or study                         </div> <div> <input checked="" type="checkbox"/> Form 990 of other organizations                             <input checked="" type="checkbox"/> Approval by the board or compensation committee                         </div> </div>                                                                                                      |     |    |
| <div>4</div> <div>During the year, did any person listed on Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization:</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |     |    |
| <div>a</div> <div>Receive a severance payment or change-of-control payment?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 4a  | No |
| <div>b</div> <div>Participate in, or receive payment from, a supplemental nonqualified retirement plan?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 4b  | No |
| <div>c</div> <div>Participate in, or receive payment from, an equity-based compensation arrangement?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 4c  | No |
| <div></div> <div>If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |     |    |
| <div></div> <div>Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |     |    |
| <div>5</div> <div>For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |     |    |
| <div>a</div> <div>The organization?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 5a  | No |
| <div>b</div> <div>Any related organization?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 5b  | No |
| <div></div> <div>If "Yes," on line 5a or 5b, describe in Part III.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |     |    |
| <div>6</div> <div>For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |     |    |
| <div>a</div> <div>The organization?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 6a  | No |
| <div>b</div> <div>Any related organization?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 6b  | No |
| <div></div> <div>If "Yes," on line 6a or 6b, describe in Part III.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |     |    |
| <div>7</div> <div>For persons listed on 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.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 7   | No |
| <div>8</div> <div>Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 8   | No |
| <div>9</div> <div>If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 9   |    |

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on 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, applicable column (D) and (E) amounts for that individual

| (A) Name and Title                                      |      | (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 in column(B) reported as deferred on prior Form 990 |
|---------------------------------------------------------|------|----------------------------------------------------|-------------------------------------|-------------------------------------|------------------------------------------------|-------------------------|---------------------------------|----------------------------------------------------------------------|
|                                                         |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |                                                |                         |                                 |                                                                      |
| 1 David SpencePresident                                 | (i)  | 233,400<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 21,900<br>-----<br>0                           | 8,739<br>-----<br>0     | 264,039<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 2 James E Bottoms<br>Senior Vice President              | (i)  | 200,000<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 19,400<br>-----<br>0                           | 1,025<br>-----<br>0     | 220,425<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 3 Andy Baxter<br>VP-Educator Effect                     | (i)  | 150,000<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 14,400<br>-----<br>0                           | 13,148<br>-----<br>0    | 177,548<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 4 Joan Lord<br>VP-EDUCATION POLICY                      | (i)  | 146,333<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 14,033<br>-----<br>0                           | 680<br>-----<br>0       | 161,046<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 5 Robert Scott Warren<br>DIR-State InitiativeS          | (i)  | 146,250<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 14,025<br>-----<br>0                           | 999<br>-----<br>0       | 161,274<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 6 Steve Broome<br>Dir-State Development                 | (i)  | 152,667<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 14,667<br>-----<br>0                           | 21,198<br>-----<br>0    | 188,532<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 7 JAMES STONE III<br>Director, National Research Center | (i)  | 195,000<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 18,900<br>-----<br>0                           | 913<br>-----<br>0       | 214,813<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |
| 8 John Buchanan<br>school improvement consultant        | (i)  | 150,000<br>-----<br>0                              | 0<br>-----<br>0                     | 0<br>-----<br>0                     | 1,806<br>-----<br>0                            | 2,744<br>-----<br>0     | 154,550<br>-----<br>0           | 0<br>-----<br>0                                                      |
|                                                         | (ii) |                                                    |                                     |                                     |                                                |                         |                                 |                                                                      |

**Part III**   **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

| Return Reference | Explanation |
|------------------|-------------|
|------------------|-------------|

Schedule L  
(Form 990 or 990-EZ)

Transactions with Interested Persons  
▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.  
▶ Attach to Form 990 or Form 990-EZ.  
▶ Information about Schedule L (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047  
**2015**  
Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization  
BOARD OF CONTROL FOR SOUTHERN REGIONAL EDUCATION

Employer identification number  
58-0566141

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only)  
Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

| 1 | (a) Name of disqualified person | (b) Relationship between disqualified person and organization | (c) Description of transaction | (d) Corrected? |    |
|---|---------------------------------|---------------------------------------------------------------|--------------------------------|----------------|----|
|   |                                 |                                                               |                                | Yes            | No |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |
|   |                                 |                                                               |                                |                |    |

2 Enter the amount of tax incurred by organization managers or disqualified persons during the year under section 4958 . . . . . ▶ \$

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . . . ▶ \$

Part II Loans to and/or From Interested Persons.  
Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

| (a) Name of interested person | (b) Relationship with organization | (c) Purpose of loan | (d) Loan to or from the organization? |      | (e) Original principal amount | (f) Balance due | (g) In default? |    | (h) Approved by board or committee? |    | (i) Written agreement? |    |
|-------------------------------|------------------------------------|---------------------|---------------------------------------|------|-------------------------------|-----------------|-----------------|----|-------------------------------------|----|------------------------|----|
|                               |                                    |                     | To                                    | From |                               |                 | Yes             | No | Yes                                 | No | Yes                    | No |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |
|                               |                                    |                     |                                       |      |                               |                 |                 |    |                                     |    |                        |    |

Total ▶ \$

Part III Grants or Assistance Benefiting Interested Persons.  
Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of assistance | (d) Type of assistance | (e) Purpose of assistance |
|-------------------------------|-----------------------------------------------------------------|--------------------------|------------------------|---------------------------|
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |
|                               |                                                                 |                          |                        |                           |



**Part IV Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

| (a) Name of interested person | (b) Relationship between interested person and the organization | (c) Amount of transaction | (d) Description of transaction | (e) Sharing of organization's revenues? |    |
|-------------------------------|-----------------------------------------------------------------|---------------------------|--------------------------------|-----------------------------------------|----|
|                               |                                                                 |                           |                                | Yes                                     | No |
| (1) BETSEY D Martin           | OFFICER'S CHILD                                                 | 50,000                    | FULL-TIME WAGES                |                                         | No |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |
|                               |                                                                 |                           |                                |                                         |    |

**Part V Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions)

| Return Reference | Explanation |
|------------------|-------------|
|------------------|-------------|

**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 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at  
[www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2015****Open to Public  
Inspection**Name of the organization  
BOARD OF CONTROL FOR SOUTHERN  
REGIONAL EDUCATION**Employer identification number**

58-0566141

**990 Schedule O, Supplemental Information**

| Return<br>Reference                        | Explanation                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Form 990, Part<br>VI, Section A,<br>line 1 | THE GOVERNING BOARD OF THE SOUTHERN REGIONAL EDUCATION BOARD IS MADE UP OF 80 INDEPENDENT MEMBERS TO EXPEDITE DECISION-MAKING, THE BOARD HAS ASSIGNED AUTHORITY TO AN EXECUTIVE COMMITTEE COMPOSED OF 18-20 MEMBERS, ALL OF WHOM ARE GOVERNING BOARD MEMBERS, TO ACT FULLY ON ITS BEHALF DURING THE FISCAL YEAR THE FULL BOARD DOES, HOWEVER, MEETING ANNUALLY AND IS RESPONSIBLE FOR COMPLIANCE WITH ALL SREB POLICIES |
| Form 990, Part<br>VI, Section A,<br>line 6 | The Board of Control for Southern Regional Education was created in 1948 as an interstate compact comprised of member states Currently there are sixteen states whose governors serve as members of the governing board each governor appoints four additional members of the governing board All board members have equal voting rights                                                                                |

**990 Schedule O, Supplemental Information**

| Return Reference                      | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Form 990, Part VI, Section A, line 7a | Governors of each member state appoint four members of the governing Board. The governors and their appointees have equal voting rights.                                                                                                                                                                                                                                                                                                                                  |
| Form 990, Part VI, Section B, line 11 | The CFO reviews the form 990-- any issues are discussed and resolved with appropriate personnel. Once all issues are resolved, a copy of the 990 is provided to the Executive Committee who are empowered to act on behalf of the entire board. The Executive Committee may direct any questions/issues to the President/CFO for resolution. Once the Executive Committee approves the 990, a copy of the final tax form is sent to all Board members before it is filed. |

**990 Schedule O, Supplemental Information**

| Return Reference                       | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Form 990, Part VI, Section B, line 12c | Officers, directors and key employees are provided copies of the conflict of interest policy and a Disclosure Questionnaire which they complete and sign, indicating that they have read and understand the Policy and that their answers are complete and accurate. Questionnaires are completed and submitted annually, however, SREB requires disclosure of potential conflicts of interest on a continuous basis. The Board/Executive Committee decides if a conflict of interest exists and, if so, appoints a disinterested person/committee to investigate alternatives. The Board determines appropriate disciplinary/corrective action for any violations of the policy. A Whistleblower Policy provides a mechanism for reporting of any suspected violations.                                                                                                                                                                               |
| Form 990, Part VI, Section B, line 15  | The Board of Directors determines the compensation of the President; the executive Committee, acting on behalf of the Board, reviews compensation benchmarking analyses (including government, education, testing, competitive nonprofits and other like organizations) for similar positions and makes recommendations as appropriate, ensuring they are well justified, reasonable and documented. The President has not received a pay raise since 2005. COMPENSATION FOR EXECUTIVE STAFF/KEY EMPLOYEES IS DETERMINED BY THE EXECUTIVE COMMITTEE BASED ON AN ANNUAL PERFORMANCE REVIEW AND RECOMMENDATIONS BY THE PRESIDENT, INCLUDING ATTAINMENT OF PERFORMANCE GOALS AND EXPECTATIONS. LAST DATE OF PAY RAISES ARE: SENIOR VP (2014), VP FOR SPECIAL PROJECTS (2014), VP FOR EDUCATIONAL POLICIES (2015), EXECUTIVE DIRECTOR-COUNCIL FOR COLLEGIATE NURSING (2011), CFO (2015), VP FOR STATE SERVICES (2015), DIRECTOR OF HUMAN RESOURCES (2015). |

**990 Schedule O, Supplemental Information**

| Return Reference                      | Explanation                                                                                                                                    |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Form 990, Part VI, Section C, line 19 | Documents are available on an as requested basis                                                                                               |
| Form 990, Part IX, line 11g           | CONTRACTED SERVICES Program service expenses 8,786,344 Management and general expenses 146,990 Fundraising expenses 0 Total expenses 8,933,334 |