

Form **990**  
 Department of the Treasury  
 Internal Revenue Service

**Return of Organization Exempt From Income Tax**  
**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)**  
 The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047  
**2012**  
**Open to Public Inspection**

**A For the 2012 calendar year, or tax year beginning 07-01-2012, 2012, and ending 06-30-2013**

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

**C** Name of organization: THE SCHOTT FDTN FOR PUBLIC EDUCATION  
 Doing Business As:  
 Number and street (or P O box if mail is not delivered to street address) Room/suite: 675 MASSACHUSETTS AVENUE 8TH FLOOR  
 City or town, state or country, and ZIP + 4: CAMBRIDGE, MA 02139

**D** Employer identification number: 04-3457065  
**E** Telephone number: (617) 876-7700  
**G** Gross receipts \$ 2,291,889

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

**H(a)** Is this a group return for affiliates?  Yes  No  
**H(b)** Are all affiliates included?  Yes  No  
 If "No," attach a list (see instructions)  
**H(c)** Group exemption number ▶

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no )  4947(a)(1) or  527

**J** Website: WWW.SCHOTTFOUNDATION.ORG

**K** Form of organization:  Corporation  Trust  Association  Other ▶  
**L** Year of formation: 1999 **M** State of legal domicile: MA

**Part I Summary**

Activities & Governance	<b>1</b> Briefly describe the organization's mission or most significant activities THE PURPOSE OF THE CORPORATION IS TO ENGAGE IN THE FOLLOWING ACTIVITIES (1) TO OPERATE EXCLUSIVELY FOR CHARITABLE AND EDUCATIONAL PURPOSES UNDER CODE SECTION 501(C)(3), (2) TO DEVELOP AND STRENGTHEN A BROAD-BASED AND REPRESENTATIVE MOVEMENT TO ACHIEVE FULLY RESOURCED, QUALITY PRE K-12 PUBLIC EDUCATION, AND (3) TO ENGAGE IN ANY AND ALL OTHER LAWFUL ACTIVITIES INCIDENTAL TO AND IN PURSUIT OF THE FOREGOING PURPOSES, EXCEPT AS SPECIFICALLY RESTRICTED BY THE ARTICLES OF ORGANIZATION		
	<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>	13
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	13
	<b>5</b> Total number of individuals employed in calendar year 2012 (Part V, line 2a)	<b>5</b>	20
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	13
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	20,000
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34	<b>7b</b>	0	
Revenue	<b>8</b> Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	<b>9</b> Program service revenue (Part VIII, line 2g)	2,794,345	1,909,990
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	0	0
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	93,101	361,899
	<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	88,585	20,000
Expenses	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	2,976,031	2,291,889
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	2,046,757	1,874,040
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	0	0
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	1,904,839	1,970,882
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶92,012	0	0
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	1,049,203	720,796
	<b>18</b> Total expenses Add lines 13-17 (must equal Part IX, column (A), line 25)	5,000,799	4,565,718
<b>19</b> Revenue less expenses Subtract line 18 from line 12	-2,024,768	-2,273,829	
Net Assets or Fund Balances	<b>20</b> Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	<b>21</b> Total liabilities (Part X, line 26)	10,582,125	8,579,415
	<b>22</b> Net assets or fund balances Subtract line 21 from line 20	1,003,481	819,174

**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: \*\*\*\*\*  
 Date: 2014-05-14  
 JOHN H JACKSON PRESIDENT AND CEO  
 Type or print name and title

**Paid Preparer Use Only**

Preparer's name: JOSEPH M GISO	Preparer's signature:	Date:	Check <input type="checkbox"/> if self-employed	PTIN: P00030126
Firm's name: CBIZ TOFIAS	Firm's address: 500 BOYLSTON STREET, BOSTON, MA 02116		Firm's EIN: 26-3753134	Phone no: (617) 761-0600

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

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III [ ] Yes [X] No

1 Briefly describe the organization's mission

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

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No

If "Yes," describe these changes on Schedule O

4 Describe the 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 \$ 3,098,264 including grants of \$ 1,805,040 ) (Revenue \$ )

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

4b (Code ) (Expenses \$ 147,214 including grants of \$ ) (Revenue \$ )

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

4c (Code ) (Expenses \$ 203,916 including grants of \$ ) (Revenue \$ )

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

(Code ) (Expenses \$ 55 including grants of \$ ) (Revenue \$ )

WOMEN'S PIPELINE FOR CHANGE

(Code ) (Expenses \$ 69,000 including grants of \$ 69,000 ) (Revenue \$ )

TEACHERS AS LEADERS

4d Other program services (Describe in Schedule O )

(Expenses \$ 69,055 including grants of \$ 69,000 ) (Revenue \$ )

4e Total program service expenses 3,518,449

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i> <input type="checkbox"/>	Yes	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> (see instructions)? <input type="checkbox"/>	Yes	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i> <input type="checkbox"/>		No
<b>4 Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> <input type="checkbox"/>	Yes	
<b>5</b> 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? <i>If "Yes," complete Schedule C, Part III</i> <input type="checkbox"/>		No
<b>6</b> 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? <i>If "Yes," complete Schedule D, Part I</i> <input type="checkbox"/>		No
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i> <input type="checkbox"/>		No
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i> <input type="checkbox"/>		No
<b>9</b> 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? <i>If "Yes," complete Schedule D, Part IV</i> <input type="checkbox"/>		No
<b>10</b> Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i> <input type="checkbox"/>	Yes	
<b>11</b> 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		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i> <input type="checkbox"/>	Yes	
<b>b</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? <i>If "Yes," complete Schedule D, Part VII</i> <input type="checkbox"/>		No
<b>c</b> Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i> <input type="checkbox"/>		No
<b>d</b> Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i> <input type="checkbox"/>		No
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i> <input type="checkbox"/>		No
<b>f</b> 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)? <i>If "Yes," complete Schedule D, Part X</i> <input type="checkbox"/>	Yes	
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i> <input type="checkbox"/>	Yes	
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i> <input type="checkbox"/>		No
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		No
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?		No
<b>b</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? <i>If "Yes," complete Schedule F, Parts I and IV</i>		No
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Parts II and IV</i>		No
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Parts III and IV</i>		No
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions)</i>		No
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		No
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		No
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		No
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		

**Part IV Checklist of Required Schedules** (continued)

<b>21</b>	Did the organization report more than \$5,000 of grants and other assistance to any government or organization in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i> . . . . .	<b>21</b>	Yes	
<b>22</b>	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> . . . . .	<b>22</b>		No
<b>23</b>	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? <i>If "Yes," complete Schedule J</i> . . . . .	<b>23</b>	Yes	
<b>24a</b>	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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25</i> . . . . .	<b>24a</b>		No
<b>b</b>	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . . .	<b>24b</b>		
<b>c</b>	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .	<b>24c</b>		
<b>d</b>	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . . .	<b>24d</b>		
<b>25a</b>	<b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	<b>25a</b>		No
<b>b</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? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	<b>25b</b>		No
<b>26</b>	Was a loan to or by a current or former officer, director, trustee, key employee, highest compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i> . . . . .	<b>26</b>		No
<b>27</b>	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? <i>If "Yes," complete Schedule L, Part III</i> . . . . .	<b>27</b>		No
<b>28</b>	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)			
<b>a</b>	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28a</b>		No
<b>b</b>	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28b</b>		No
<b>c</b>	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? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	<b>28c</b>		No
<b>29</b>	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> . . . . .	<b>29</b>		No
<b>30</b>	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> . . . . .	<b>30</b>		No
<b>31</b>	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> . . . . .	<b>31</b>		No
<b>32</b>	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .	<b>32</b>		No
<b>33</b>	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> . . . . .	<b>33</b>		No
<b>34</b>	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> . . . . .	<b>34</b>	Yes	
<b>35a</b>	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	<b>35a</b>	Yes	
<b>b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .	<b>35b</b>	Yes	
<b>36</b>	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .	<b>36</b>		No
<b>37</b>	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? <i>If "Yes," complete Schedule R, Part VI</i>	<b>37</b>		No
<b>38</b>	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 . . . . .	<b>38</b>	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

Table with columns for question ID, question text, and Yes/No response boxes. Rows include questions 1a-1b, 1c, 2a-2b, 3a-3b, 4a-4b, 5a-5c, 6a-6b, 7a-7h, 8, 9a-9b, 10a-10b, 11a-11b, 12a-12b, 13a-13c, and 14a-14b.

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

Check if Schedule O contains a response to any question in this Part VI . . . . . [X]

Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a Enter the number of voting members of the governing body at the end of the tax year (13); 1b Enter the number of voting members included in line 1a, above, who are independent (13); 2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? (Yes); 3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? (No); 4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? (No); 5 Did the organization become aware during the year of a significant diversion of the organization's assets? (No); 6 Did the organization have members or stockholders? (No); 7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? (No); 7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? (No); 8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 8a The governing body? (Yes); 8b Each committee with authority to act on behalf of the governing body? (Yes); 9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O (No).

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

Table with 3 columns: Question, Yes, No. Rows include: 10a Did the organization have local chapters, branches, or affiliates? (No); 10b 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?; 11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? (Yes); 11b Describe in Schedule O the process, if any, used by the organization to review this Form 990; 12a Did the organization have a written conflict of interest policy? If "No," go to line 13 (Yes); 12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? (Yes); 12c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done (Yes); 13 Did the organization have a written whistleblower policy? (Yes); 14 Did the organization have a written document retention and destruction policy? (Yes); 15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? 15a The organization's CEO, Executive Director, or top management official (Yes); 15b Other officers or key employees of the organization (Yes); 16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? (No); 16b 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: MA, NY
18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply: [X] Own website, [X] Another's website, [X] 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, physical address, and telephone number of the person who possesses the books and records of the organization: ALFRED T MILLER JR SR VP OF OPE 675 MASSACHUSETTS AVENUE 8TH FLOOR CAMBRIDGE, MA (617) 876-7700

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

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

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

**1a** Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

• List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation 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 parts VII 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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) GREG JOBIN-LEEDS CO-CHAIR	1 00 0 00	X		X				0	0	0
(2) BAISHALI RINKU SEN CO-CHAIR	1 00 0 00	X		X				0	0	0
(3) MICHELLE COFFEY CLERK	1 00 0 00	X		X				0	0	0
(4) MARIA JOBIN-LEEDS TREASURER	1 00 1 00	X		X				0	0	0
(5) MAISIE CHIN BOARD DIRECTOR	1 00 0 00	X						0	0	0
(6) ANDREW GILLUM BOARD DIRECTOR	1 00 1 00	X						0	0	0
(7) JACKIE JENKINS-SCOTT BOARD DIRECTOR	1 00 0 00	X						0	0	0
(8) GERARD LEEDS BOARD DIRECTOR	1 00 0 00	X						0	0	0
(9) LILO LEEDS BOARD DIRECTOR	1 00 0 00	X						0	0	0
(10) IAN INABA BOARD DIRECTOR	1 00 0 00	X						0	0	0
(11) DEBORAH LABELLE BOARD DIRECTOR	1 00 0 00	X						0	0	0
(12) ALVIN LOUIS STARKS BOARD DIRECTOR	1 00 0 00	X						0	0	0
(13) JOHN H JACKSON PRESIDENT/CEO, EX-OFFICIO	39 00 1 00			X				379,126	0	48,287
(14) CASSIE SCHWERNER SENIOR VP OF PROGRAMS	39 00 1 00			X				172,647	0	46,866
(15) ALFRED T MILLER JR SENIOR VP OF OPERATIONS	35 00 5 00			X				154,608	0	35,927
(16) ANN E BEAUDRY VP OF DEVELOPMENT & STRATEGY	40 00 0 00			X				138,936	0	22,424

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
<b>1b Sub-Total</b>										
<b>c Total from continuation sheets to Part VII, Section A</b>										
<b>d Total (add lines 1b and 1c)</b>							845,317	0	153,504	

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

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

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

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

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



**Part VIII Statement of Revenue**

Check if Schedule O contains a response to any question in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1a</b>	Federated campaigns . . . . . <b>1a</b>					
	<b>b</b>	Membership dues . . . . . <b>1b</b>					
	<b>c</b>	Fundraising events . . . . . <b>1c</b>					
	<b>d</b>	Related organizations . . . . . <b>1d</b>					
	<b>e</b>	Government grants (contributions) <b>1e</b>					
	<b>f</b>	All other contributions, gifts, grants, and similar amounts not included above <b>1f</b>	1,909,990				
	<b>g</b>	Noncash contributions included in lines 1a-1f \$					
	<b>h</b>	<b>Total.</b> Add lines 1a-1f . . . . .	1,909,990				
<b>Program Service Revenue</b>	<b>2a</b>	_____ Business Code _____					
	<b>b</b>	_____					
	<b>c</b>	_____					
	<b>d</b>	_____					
	<b>e</b>	_____					
	<b>f</b>	All other program service revenue					
	<b>g</b>	<b>Total.</b> Add lines 2a-2f . . . . .					
<b>Other Revenue</b>	<b>3</b>	Investment income (including dividends, interest, and other similar amounts) . . . . .	155,535			155,535	
	<b>4</b>	Income from investment of tax-exempt bond proceeds . . . . .					
	<b>5</b>	Royalties . . . . .					
	<b>6a</b>	Gross rents	(i) Real				
			(ii) Personal				
			<b>b</b> Less rental expenses				
			<b>c</b> Rental income or (loss)				
	<b>d</b>	Net rental income or (loss) . . . . .					
	<b>7a</b>	Gross amount from sales of assets other than inventory	(i) Securities	206,364			
			(ii) Other				
			<b>b</b> Less cost or other basis and sales expenses	0			
			<b>c</b> Gain or (loss)	206,364			
	<b>d</b>	Net gain or (loss) . . . . .	206,364			206,364	
	<b>8a</b>	Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18 . . . . .					
	<b>a</b>						
<b>b</b>	Less direct expenses . . . . . <b>b</b>						
<b>c</b>	Net income or (loss) from fundraising events . . . . .						
<b>9a</b>	Gross income from gaming activities See Part IV, line 19 . . . . .						
<b>a</b>							
<b>b</b>	Less direct expenses . . . . . <b>b</b>						
<b>c</b>	Net income or (loss) from gaming activities . . . . .						
<b>10a</b>	Gross sales of inventory, less returns and allowances . . . . .	<b>a</b>					
		<b>b</b> Less cost of goods sold . . . . . <b>b</b>					
		<b>c</b> Net income or (loss) from sales of inventory . . . . .					
Miscellaneous Revenue		Business Code					
<b>11a</b>	MANAGEMENT FEE-RELATED	561000	20,000		20,000		
<b>b</b>	_____						
<b>c</b>	_____						
<b>d</b>	All other revenue . . . . .						
<b>e</b>	<b>Total.</b> Add lines 11a-11d . . . . .		20,000				
<b>12</b>	<b>Total revenue.</b> See Instructions . . . . .		2,291,889	0	20,000	361,899	

**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 to any question in this Part IX

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>		<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
<b>1</b>	Grants and other assistance to governments and organizations in the United States. See Part IV, line 21	1,874,040	1,874,040		
<b>2</b>	Grants and other assistance to individuals in the United States. See Part IV, line 22				
<b>3</b>	Grants and other assistance to governments, organizations, and individuals outside the United States. See Part IV, lines 15 and 16				
<b>4</b>	Benefits paid to or for members				
<b>5</b>	Compensation of current officers, directors, trustees, and key employees	792,405	402,238	339,085	51,082
<b>6</b>	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b>	Other salaries and wages	744,940	555,867	180,834	8,239
<b>8</b>	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
<b>9</b>	Other employee benefits	433,537	260,016	161,815	11,706
<b>10</b>	Payroll taxes				
<b>11</b>	Fees for services (non-employees)				
<b>a</b>	Management	4,875		4,875	
<b>b</b>	Legal	14,566	1,743	12,823	
<b>c</b>	Accounting	41,550		41,550	
<b>d</b>	Lobbying				
<b>e</b>	Professional fundraising services. See Part IV, line 17				
<b>f</b>	Investment management fees	41,455		41,455	
<b>g</b>	Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	136,275	128,852	6,833	590
<b>12</b>	Advertising and promotion	258	258		
<b>13</b>	Office expenses	8,361	3,171	5,141	49
<b>14</b>	Information technology				
<b>15</b>	Royalties				
<b>16</b>	Occupancy				
<b>17</b>	Travel	138,169	97,833	35,155	5,181
<b>18</b>	Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b>	Conferences, conventions, and meetings	16,287	11,602	4,685	
<b>20</b>	Interest				
<b>21</b>	Payments to affiliates				
<b>22</b>	Depreciation, depletion, and amortization	27,990	15,916	12,037	37
<b>23</b>	Insurance	10,636	742	9,894	
<b>24</b>	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)				
<b>a</b>	RENT & UTILITIES	177,933	104,829	69,208	3,896
<b>b</b>	TELEPHONE	40,367	29,711	8,733	1,923
<b>c</b>	PRINTING & PUBLICATIONS	17,480	16,696	304	480
<b>d</b>	RECRUITING	10,687		2,021	8,666
<b>e</b>	All other expenses	33,907	14,935	18,809	163
<b>25</b>	<b>Total functional expenses.</b> Add lines 1 through 24e	4,565,718	3,518,449	955,257	92,012
<b>26</b>	<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 to any question in this Part X

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	1,421,165	<b>1</b>	1,348,171
	<b>2</b> Savings and temporary cash investments . . . . .	896,914	<b>2</b>	365,348
	<b>3</b> Pledges and grants receivable, net . . . . .		<b>3</b>	
	<b>4</b> Accounts receivable, net . . . . .	1,711,968	<b>4</b>	343,017
	<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 . . . . .	21,027	<b>9</b>	29,490
	<b>10a</b> Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D . . . . .	<b>10a</b> 107,531		
	<b>b</b> Less accumulated depreciation . . . . .	<b>10b</b> 61,461	63,431	<b>10c</b> 46,070
	<b>11</b> Investments—publicly traded securities . . . . .	6,435,545	<b>11</b>	6,412,188
	<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 . . . . .	32,075	<b>15</b>	35,131
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 34) . . . . .	10,582,125	<b>16</b>	8,579,415	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	230,681	<b>17</b>	197,174
	<b>18</b> Grants payable . . . . .	772,800	<b>18</b>	622,000
	<b>19</b> Deferred revenue . . . . .		<b>19</b>	
	<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 Total liabilities.</b> Add lines 17 through 25 . . . . .	1,003,481	<b>26</b>	819,174
<b>Net Assets or Fund Balances</b>	<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 . . . . .	1,200,824	<b>27</b>	1,089,268
	<b>28</b> Temporarily restricted net assets . . . . .	8,377,820	<b>28</b>	6,670,973
	<b>29</b> Permanently restricted net assets . . . . .		<b>29</b>	
	<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> Total net assets or fund balances . . . . .	9,578,644	<b>33</b>	7,760,241	
<b>34</b> Total liabilities and net assets/fund balances . . . . .	10,582,125	<b>34</b>	8,579,415	

**Part XI Reconciliation of Net Assets**

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

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	2,291,889
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	4,565,718
<b>3</b>	Revenue less expenses Subtract line 2 from line 1	<b>3</b>	-2,273,829
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	9,578,644
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	455,426
<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>	7,760,241

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response to any question 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 _____ 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? 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 <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		No
<b>2b</b> Were the organization's financial statements audited by an independent accountant? 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 <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	Yes	
<b>2c</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? 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>3b</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		

**SCHEDULE A**  
(Form 990 or 990EZ)

**Public Charity Status and Public Support**

OMB No 1545-0047

**2012**

**Open to Public Inspection**

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

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

Department of the Treasury  
Internal Revenue Service

**Name of the organization**

THE SCHOTT FDTN FOR PUBLIC EDUCATION

**Employer identification number**

04-3457065

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

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

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2  A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E )
- 3  A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4  A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state \_\_\_\_\_
- 5  An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II )
- 6  A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7  An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II )
- 8  A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II )
- 9  An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III )
- 10  An organization organized and operated exclusively to test for public safety See **section 509(a)(4)**.
- 11  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h  
 a  Type I   b  Type II   c  Type III - Functionally integrated   d  Type III - Non-functionally integrated
- e  By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)
- f  If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box
- g  Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?  
 (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?  
 (ii) A family member of a person described in (i) above?  
 (iii) A 35% controlled entity of a person described in (i) or (ii) above?
- h Provide the following information about the supported organization(s)

	Yes	No
<b>11g(i)</b>		
<b>11g(ii)</b>		
<b>11g(iii)</b>		

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

**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 (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	5,270,100	3,043,575	13,558,997	2,794,345	1,909,990	26,577,007
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>4 Total.</b> Add lines 1 through 3	5,270,100	3,043,575	13,558,997	2,794,345	1,909,990	26,577,007
<b>5</b> 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)						18,792,730
<b>6 Public support.</b> Subtract line 5 from line 4						7,784,277

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>7</b> Amounts from line 4	5,270,100	3,043,575	13,558,997	2,794,345	1,909,990	26,577,007
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	28,444	22,008	18,939	120,467	155,535	345,393
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on	35,000	35,000	35,000	35,000	20,000	160,000
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)		34,258	16,850	74,673		125,781
<b>11 Total support</b> (Add lines 7 through 10)						27,208,181
<b>12</b> Gross receipts from related activities, etc. (see instructions)					<b>12</b>	65,675
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and <b>stop here</b> . . . . . <input type="checkbox"/>						

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

<b>14</b> Public support percentage for 2012 (line 6, column (f) divided by line 11, column (f))	<b>14</b>	28.610 %
<b>15</b> Public support percentage for 2011 Schedule A, Part II, line 14	<b>15</b>	27.240 %
<b>16a 33 1/3% support test—2012.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization <input type="checkbox"/>		
<b>b 33 1/3% support test—2011.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization <input type="checkbox"/>		
<b>17a 10%-facts-and-circumstances test—2012.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input checked="" type="checkbox"/>		
<b>b 10%-facts-and-circumstances test—2011.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support</b> (Subtract line 7c from line 6)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) 2012	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						
<b>14 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and <b>stop here</b> <input type="checkbox"/>						

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

<b>15</b> Public support percentage for 2012 (line 8, column (f) divided by line 13, column (f))	<b>15</b>	
<b>16</b> Public support percentage from 2011 Schedule A, Part III, line 15	<b>16</b>	

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

<b>17</b> Investment income percentage for <b>2012</b> (line 10c, column (f) divided by line 13, column (f))	<b>17</b>	
<b>18</b> Investment income percentage from <b>2011</b> Schedule A, Part III, line 17	<b>18</b>	

- 19a 33 1/3% support tests—2012.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization
- b 33 1/3% support tests—2011.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization
- 20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

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

Table with 2 columns: Facts And Circumstances Test, Explanation. The Facts And Circumstances Test section contains a detailed biography of Maria Chien, highlighting her leadership roles in education, her work with the Schott Foundation, and her various awards and community contributions. The Explanation section provides further context on her educational background, professional achievements, and her commitment to social justice and community development.

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

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

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

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



SCHEDULE C (Form 990 or 990-EZ)

Political Campaign and Lobbying Activities

OMB No 1545-0047

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

2012

Open to Public Inspection

Department of the Treasury Internal Revenue Service

If the organization answered "Yes" to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
Section 527 organizations Complete Part I-A only

If the organization answered "Yes" to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered "Yes" to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, Part V, line 35c (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Table with 2 columns: Name of the organization (THE SCHOTT FDTN FOR PUBLIC EDUCATION) and Employer identification number (04-3457065)

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

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV
2 Political expenditures \$
3 Volunteer hours

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

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 \$
2 Enter the amount of any excise tax incurred by organization managers under section 4955 \$
3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? Yes No
4a Was a correction made? Yes No
b If "Yes," describe in Part IV

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

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities \$
2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities \$
3 Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b \$
4 Did the filing organization file Form 1120-POL for this year? Yes No
5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments

Table with 5 columns: (a) Name, (b) Address, (c) EIN, (d) Amount paid from filing organization's funds, (e) Amount of political contributions received and promptly and directly delivered to a separate political organization

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).****A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)**B** Check  if the filing organization checked box A and "limited control" provisions apply

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
<b>1a</b>	Total lobbying expenditures to influence public opinion (grass roots lobbying)	35,000													
<b>b</b>	Total lobbying expenditures to influence a legislative body (direct lobbying)	15,000													
<b>c</b>	Total lobbying expenditures (add lines 1a and 1b)	50,000													
<b>d</b>	Other exempt purpose expenditures	4,423,706													
<b>e</b>	Total exempt purpose expenditures (add lines 1c and 1d)	4,473,706													
<b>f</b>	Lobbying nontaxable amount Enter the amount from the following table in both columns	373,685													
<table border="1" style="width: 100%;"> <thead> <tr> <th style="text-align: left;">If the amount on line 1e, column (a) or (b) is:</th> <th style="text-align: left;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000</td> </tr> </tbody> </table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
<b>g</b>	Grassroots nontaxable amount (enter 25% of line 1f)	93,421													
<b>h</b>	Subtract line 1g from line 1a If zero or less, enter -0-	0													
<b>i</b>	Subtract line 1f from line 1c If zero or less, enter -0-	0													
<b>j</b>	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		<input type="checkbox"/> Yes <input type="checkbox"/> No												

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

**Lobbying Expenditures During 4-Year Averaging Period**

Calendar year (or fiscal year beginning in)	(a) 2009	(b) 2010	(c) 2011	(d) 2012	(e) Total
<b>2a</b> Lobbying nontaxable amount	372,170	357,387	390,072	373,685	1,493,314
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					2,239,971
<b>c</b> Total lobbying expenditures		105,000	75,000	50,000	230,000
<b>d</b> Grassroots nontaxable amount	93,043	89,347	97,518	93,421	373,329
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					559,994
<b>f</b> Grassroots lobbying expenditures		40,000	40,000	35,000	115,000

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

For each "Yes" response to lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

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

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

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

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

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

**Part IV Supplemental Information**

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, Part II-A (affiliated group list), Part II-A, line 2, and Part II-B, line 1. Also, complete this part for any additional information

Identifier	Return Reference	Explanation

SCHEDULE D (Form 990)

OMB No 1545-0047

Supplemental Financial Statements

2012

Open to Public Inspection

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. Attach to Form 990. See separate instructions.

Department of the Treasury Internal Revenue Service

Name of the organization THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number

04-3457065

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

Table with 2 columns: (a) Donor advised funds, (b) Funds and other accounts. Rows include: 1 Total number at end of year, 2 Aggregate contributions to (during year), 3 Aggregate grants from (during year), 4 Aggregate value at end of year, 5 Did the organization inform all donors...?, 6 Did the organization inform all grantees...?

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

Table with 2 columns: Description, Held at the End of the Year. Rows include: 1 Purpose(s) of conservation easements, 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution..., 3 Number of conservation easements modified..., 4 Number of states where property subject to conservation easement is located..., 5 Does the organization have a written policy..., 6 Staff and volunteer hours..., 7 Amount of expenses..., 8 Does each conservation easement..., 9 In Part XIII, describe how the organization reports...

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

Table with 2 columns: Description, Amount. Rows include: 1a If the organization elected, as permitted under SFAS 116..., 1b If the organization elected, as permitted under SFAS 116..., 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain...

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

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

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

**4** Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part 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" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

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

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

	Amount
<b>1c</b>	
<b>1d</b>	
<b>1e</b>	
<b>1f</b>	

**2a** Did the organization include an amount on Form 990, Part X, line 21?  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	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .	6,435,545	1,061,270	843,591	1,056,647	1,254,137
<b>b</b> Contributions . . . . .		5,000,000			
<b>c</b> Net investment earnings, gains, and losses	793,568	374,275	217,679	136,944	-197,490
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .	616,825			350,000	
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .	6,612,288	6,435,545	1,061,270	843,591	1,056,647

**2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

- a** Board designated or quasi-endowment ▶ 18 090 %
  - b** Permanent endowment ▶ 0 %
  - c** Temporarily restricted endowment ▶ 81 910 %
- The percentages in 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

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

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

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements . . . . .				
<b>d</b> Equipment . . . . .		107,531	61,461	46,070
<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).) . . . . .				46,070

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

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

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

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

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

(a) Description	(b) Book value
<b>Total.</b> (Column (b) must equal Form 990, Part X, col.(B) line 15.)	

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

1 (a) Description of liability	(b) Book value
Federal income taxes	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col (B) line 25.)	

**2.** Fin 48 (ASC 740) Footnote. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**

<b>1</b>	Total revenue, gains, and other support per audited financial statements . . . . .	<b>1</b>	2,705,860
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
<b>a</b>	Net unrealized gains on investments . . . . .	<b>2a</b>	455,426
<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 ) . . . . .	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .	<b>2e</b>	455,426
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .	<b>3</b>	2,250,434
<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>	41,455
<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>	41,455
<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>	2,291,889

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return**

<b>1</b>	Total expenses and losses per audited financial statements . . . . .	<b>1</b>	4,524,263
<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>	4,524,263
<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>	41,455
<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>	41,455
<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>	4,565,718

**Part XIII Supplemental Information**

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

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

Schedule I (Form 990)

OMB No 1545-0047

Grants and Other Assistance to Organizations, Governments and Individuals in the United States
Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
Attach to Form 990

2012

Open to Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number 04-3457065

Part I General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?
2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

Table with 8 columns: (a) Name and address of organization or government, (b) EIN, (c) IRC Code section if applicable, (d) Amount of cash grant, (e) Amount of non-cash assistance, (f) Method of valuation (book, FMV, appraisal, other), (g) Description of non-cash assistance, (h) Purpose of grant or assistance.

See Additional Data Table

Main data table grid with 8 columns corresponding to the headers in Part II.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . 40
3 Enter total number of other organizations listed in the line 1 table . . . . . 1



**Part III Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22.  
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.**

Complete this part to provide the information required in Part I, line 2, Part III, column (b), and any other additional information

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

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

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ACTION INSTITUTE OF NORTH CAROLINA 5500 EXECUTIVE CENTER DR SUITE 234 CHARLOTTE, NC 28212	56-1088116	501(C)(3)	30,000				SUPPORTS A OTL MESSAGING & ORGANIZING STRATEGY IN NC
AMERICAN FEDERATION OF TEACHERS EDUCATIONAL FOUNDATION 555 NEW JERSEY AVENUE NW WASHINGTON, DC 20001	52-1439116	501(C)(3)	65,000				SUPPORT FOR THE 2013 AFT-OTL SUMMIT

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
APPLIED RESEARCH CENTER 32 BROADWAY SUITE 1801 NEW YORK, NY 10004	94-2759879	501(C)(3)	50,000				SUPPORT THE 2012 FACING RACE CONFERENCE & TRAINING
ARKANSAS ADVOCATES FOR CHILDREN AND FAMILIES UNION STATION SUITE 306 LITTLE ROCK, AR 72201	71-0492205	501(C)(3)	30,000				SUPPORT REPORTING & RESEARCH & ANALYZING

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
ARKANSAS PUBLIC POLICY PANEL1308 WEST 2ND STREET LITTLE ROCK, AR 72201	71-0467088	501(C)(3)	90,000				DEVELOP THE OPPORTUNITY TO LERAN CAMPAIGN IN ARKANSAS
BROOKLYN COLLEGE FOUNDATION2900 BEDFORD AVE BROOKLYN, NY 11210	11-1904329	501(C)(3)	75,000				SUPPORT FOR TEACHERS AS LEADERS PROJECT IN BROOKLYN COLLEGE IN NY

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CENTER FOR LABOR EDUCATION AND RESEARCH INC 3353 WASHINGTON STREET BOSTON, MA 02130	22-2604923	501(C)(3)	40,000				SUPPORTS MA JWJ'S ORGANIZING EFFORT EDUCATION FOR OTL CAMPAIGN
COMMUNITY ASSET DEVELOPMENT REDEFINING EDUCATION 8510 1/2 SOUTH BROADWAY LOS ANGELES, CA 90003	26-4753821	501(C)(3)	23,000				BOARD DISCRETIONARY GRANTS

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
ECONOMIC POLICY INSTITUTE 1333 H STREET NW EAST TOWER WASHINGTON, DC 20005	52-1368964	501(C)(3)	35,000				PRODUCE A POLICY GUIDE BASED ON A BROADER BOLDER APPROACH FOR STATE AND LOCAL STACKHOLDER'S USE
EDUCATORS FOR SOCIAL RESPONSIBILITY 23 GARDEN STREET CAMBRIDGE, MA 02139	04-2764204	501(C)(3)	10,000				COMMUNICATION EFFORTS FOR PERSONAL OPPORTUNITY PLAN WORK IN MA

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
FAMILIES AND FRIENDS OF LOUISIANA'S INCARCERATED CHILDREN 1600 ORETHA CASTLE HALEY BOULEVARD NEW ORLEANS, LA 70113	20-5924561	501(C)(3)	30,000				SOLUTION NOT SUSPENSION-MORATORIUM IN LOUISIANA
FUND FOR THE CITY OF NEW YORK 121 6TH AVENUE NEW YORK, NY 10013	13-2612524	501(C)(3)	80,000				ORGANIZING, TRAININGS & GRANTMAKING FOR IMPROVING STUDENT OPPORTUNITY IN NY

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
GLOBAL POLICY SOLUTIONS LLC 1830 11TH STREET NW SUITE 1 WASHINGTON, DC 20001	56-2521323	N/A	88,500				SUPPORT FOR THE MANAGEMENT COMMUNICATION EFFORTS FOR OTL CAMPAIGN
INSTITUTE FOR AMERICA'S FUTURE 1825 K STREET NW SUITE 400 WASHINGTON, DC 20006	52-1971942	501(C)(3)	115,000				SUPPORT FOR PROMOTION OF OTL CAMPAIGN MESSAGING



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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
INSTITUTE FOR WISCONSIN'S FUTURE 325 W SILVER SPRINGS DRIVE GLENDALE, WI 53217	39-1805801	501(C)(3)	50,000				THIS GRANT SUPPORTS OTL-MIDWEST PROJECT
KENWOOD OAKLAND COMMUNITY ORGANIZATION 4242 S COTTAGE GROVE CHICAGO, IL 60653	36-2598637	501(C)(3)	6,000				SUPPORTS THE 2012 JOURNEY FOR JUSTICE BUS CARAVAN TO D C

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
MASSACHUSETTS ADVOCATES FOR CHILDREN 25 KINGSTON STREET BOSTON, MA 02111	04-2488456	501(C)(3)	30,000				SUPPORT REFORM SCHOOL DISCIPLINE & TESTING POLICY IN MA
MASSACHUSETTS BUDGET & POLICY CENTER 15 COURT SQUARE SUITE 700 BOSTON, MA 02108	04-2967537	501(C)(3)	50,000				RESEARCH & ANALYSIS OF BUDGET & TAX POLICIES NATIONALLY

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NATIONAL CENTER FOR FAIR AND OPEN TESTING INCPO BOX 300204 BOSTON, MA 02108	22-2653502	501(C)(3)	10,000				RESEARCH & DATA ANALYSIS FOR SOLUTION NOT SUSPENSION WORK IN MA
NATIONAL ECONOMIC & SOCIAL RIGHTS INITIATIVE 90 JOHN STREET STE 308 NEW YORK, NY 10038	73-1714118	501(C)(3)	50,000				SOLUTION NOT SUSPENSION - MORATORIUM CAMPAIGN NATIONALLY

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NATIONAL PUBLIC EDUCATION SUPPORT FUND PO BOX 55273 WASHINGTON, DC 20040	26-3015634	501(C)(3)	10,000				MINI OTL CONFERENCE OF FUNDERS AND POLICYMAKERS
NORTH SHORE CHILD & FAMILY GUIDANCE CENTER 480 OLD WESTBURY ROAD ROSLIN HEIGHTS, NY 11577	11-1797183	501(C)(3)	10,000				BOARD DISCRETIONARY GRANT

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ONE VOICE MISSISSIPPI 1072 WLYNCH STREET JACKSON,MS 39203	02-0787550	501(C)(3)	85,000				SUPPORT WORK AS PART OF THE OPPORTUNITY TO LEARN IN MISSISSIPPI
ORGANIZING AND LEADERSHIP TRAINING CENTER 1803 DORCHESTER AVENUE 3RD FLOOR BOSTON,MA 02124	04-2863903	501(C)(3)	30,000				MOBILIZING EFFORTS TO SUPPORT EQUITABLE SCHOOL FUNDING IN MA

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PARENTS FOR PUBLIC SCHOOLS OF JACKSON 200 NORTH CONGRESS STREET SUITE 500 500 JACKSON, MS 39201	57-0907683	501(C)(3)	10,000				COORDINATION EFFORTS FOR THE OTL-MS CONFERENCE
PROGRESSIVE STATES NETWORK 82 WALL STREET SUITE 200 NEW YORK, NY 10005	20-2912052	501(C)(3)	10,000				SUPPORT OTL ADVANCING PUBLIC EDUCATION CAMPAIGN

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PUBLIC INTEREST PROJECTS 45 W 36TH STREET 6TH FLOOR NEW YORK, NY 10018	13-3191113	501(C)(3)	74,000				SUPPORTING GRASSROOTS COMMUNITY OTL EFFORTS NATIONALLY & OTL-MS CONFERENCE
PUBLIC POLICY AND EDUCATION FUND 94 CENTRAL AVE NEW YORK, NY 12206	13-3364209	501(C)(3)	40,000				SUPPORTS THE 2013 NY OTL SUMMIT & NY STATE ADVOCACY WORK

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
PYRAMID COMMUNITY PARENT RESOURCE CENTER 3132 NAPOLEON AVE NEW ORLEANS, LA 70125	90-0149460	501(C)(3)	10,000				"PERFECT STORM" DOCUMENTARY FOR REPLACEMENT OF PUBLIC SCHOOLS IN NEW ORLEANS
ROOT CAUSE 11 AVENUE DE LAFAYETTE BOSTON, MA 02111	20-0703238	501(C)(3)	16,000				SUPPORT THE THEORY OF CHANGE PROCESS FOR THE SCHOTT FOUNDATION



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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
RURAL COMMUNITY ALLIANCE 633 HIGHWAY 9 FOX, AR 72051	25-1917387	501(C)(3)	50,000				THIS GRANT SUPPORTS ONGOING OTL EFFORTS IN ARKANSAS
SOUTHERN ECHO 1350 LIVINGSTON LANE SUITE C JACKSON, MS 39213	64-0819311	501(C)(3)	20,000				SOLUTION NOT SUSPENSION IN MS & YOUTH ORGANIZING AND TRAINING

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SOUTHERN EDUCATION FOUNDATION 135 AUBURN AVE NE 2ND FLOOR ATLANTA, GA 30303	13-5562388	501(C)(3)	60,000				SOUTHERN STATES IN THE EQUITABLE HIGH QUALITY EARLY CHILDHOOD PROGRAMS & OTL CONFERENCE
SPITFIRE STRATEGIES 1800 M STREET NW SUITE 300 NORTH WASHINGTON, DC 20036	81-0561016	N/A	33,670				COMMUNICATION SUPPORT FOR THE OTL MORATORIUM

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
STRIVE FOR COLLEGE COLLABORATIVE 556 VALLEY WAY MILPITAS, CA 95035	27-2416448	501(C)(3)	69,000				SUPPORT OPERATING COSTS OF NY CITY REGIONAL OFFICE & SUMMER NATIONAL CONFERENCE
THE ALLIANCE FOR QUALITY EDUCATION 94 CENTRAL AVENUE ALBANY, NY 12206	22-3810450	501(C)(4)	75,000				IMPROVE NY PUBLIC EDUCATION

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE BOARD OF TRUSTEES OF THE LELAND STANFORD JUNIOR UNI STANFORD UNIV 520 GALVEZ MALL CERAS 325 STANFORD, CA 943053084	94-1156365	501(C)(3)	90,000				GRANT TO THE STANFORD CENTER RESEARCH FOR OPPORTUNITY POLICY IN EDUCATION
THE COMMUNITY FUNDS INC 909 THIRD AVENUE 22ND FLOOR NEW YORK, NY 10022	13-3062214	501(C)(3)	30,000				PROMOTE PUBLIC ENGAGEMENT IN SYSTEMIC CHANGE PUBLIC SCHOOL REFORM IN NY

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
THE NORTH STAR FUND 520 EIGHTH AVENUE SUITE 2203 NEW YORK, NY 10018 6656	13-2950801	501(C)(3)	50,000				SUPPORT OTL CAMPAIGN IN NY
VIETNAMESE AMERICAN YOUNG LEADERS ASSOCIATION 4646 MICOUD BLVD SUITE D2 NEW ORLEANS, LA 70129 1816	33-1143213	501(C)(3)	50,000				SUPPORT WORK AS PART OF THE OPPORTUNITY TO LEARN IN LOUISIANA

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

<b>(a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC Code 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
YOUTHBUILD USA58 DAY STREET SOMERVILLE,MA 02144	22-3076454	501(C)(3)	40,000				SUPPORT YOUNG'S YOUTH ORGANIZING EFFORTS IN THE BOSTON-AREA

**Schedule J**  
(Form 990)

**Compensation Information**

OMB No 1545-0047

**2012**

**Open to Public Inspection**

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

Department of the Treasury  
Internal Revenue Service

Name of the organization  
THE SCHOTT FDTN FOR PUBLIC EDUCATION

Employer identification number

04-3457065

**Part I Questions Regarding Compensation**

- 1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items
- |  |   |
|--|---|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use          |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence          |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input checked="" type="checkbox"/> Health or social club dues or initiation fees |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)          |

**b** If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

**3** 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

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input checked="" type="checkbox"/> Written employment contract                     |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input type="checkbox"/> Form 990 of other organizations                | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization

- a** Receive a severance payment or change-of-control payment?
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- c** Participate in, or receive payment from, an equity-based compensation arrangement?  
If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III

**Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.**

**5** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of

- a** The organization?
- b** Any related organization?  
If "Yes," to line 5a or 5b, describe in Part III

**6** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of

- a** The organization?
- b** Any related organization?  
If "Yes," to line 6a or 6b, describe in Part III

**7** For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III

**8** Were any amounts reported in 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

**9** If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
<b>1b</b>	Yes	
<b>2</b>	Yes	
<b>4a</b>		No
<b>4b</b>		No
<b>4c</b>		No
<b>5a</b>		No
<b>5b</b>		No
<b>6a</b>		No
<b>6b</b>		No
<b>7</b>	Yes	
<b>8</b>		No
<b>9</b>		

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

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, 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 reported as deferred in prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) JOHN H JACKSON PRESIDENT/CEO, EX-OFFICIO	(i)	324,126	55,000	0	20,000	28,287	427,413	0
	(ii)	0	0	0	0	0	0	0
(2) CASSIE SCHWERNER SENIOR VP OF PROGRAMS	(i)	167,647	5,000	0	14,000	32,866	219,513	0
	(ii)	0	0	0	0	0	0	0
(3) ALFRED T MILLER JR. SENIOR VP OF OPERATIONS	(i)	151,886	2,500	222	12,200	23,727	190,535	0
	(ii)	0	0	0	0	0	0	0
(4) ANN E BEAUDRY VP OF DEVELOPMENT & STRATEGY	(i)	121,936	17,000	0	9,800	12,624	161,360	0
	(ii)	0	0	0	0	0	0	0



**Part III Supplemental Information**

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

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

**SCHEDULE O**  
(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

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

OMB No 1545-0047

**2012**

**Open to Public  
Inspection**

Name of the organization  
THE SCHOTT FDTN FOR PUBLIC EDUCATION

**Employer identification number**

04-3457065

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

**SCHEDULE R  
(Form 990)**

**Related Organizations and Unrelated Partnerships**

OMB No 1545-0047

**2012**

**Open to Public Inspection**

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

Department of the Treasury  
Internal Revenue Service

Name of the organization  
THE SCHOTT FDTN FOR PUBLIC EDUCATION

**Employer identification number**

04-3457065

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

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

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

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

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end- of-year assets	(h) Percentage ownership	(i) Section 512 (b)(13) controlled entity?	
								Yes	No

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

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

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a** Receipt of **(i)** interest **(ii)** annuities **(iii)** royalties or **(iv)** rent from a controlled entity
- b** Gift, grant, or capital contribution to related organization(s)
- c** Gift, grant, or capital contribution from related organization(s)
- d** Loans or loan guarantees to or for related organization(s)
- e** Loans or loan guarantees by related organization(s)

- f** Dividends from related organization(s)
- g** Sale of assets to related organization(s)
- h** Purchase of assets from related organization(s)
- i** Exchange of assets with related organization(s)
- j** Lease of facilities, equipment, or other assets to related organization(s)

- k** Lease of facilities, equipment, or other assets from related organization(s)
- l** Performance of services or membership or fundraising solicitations for related organization(s)
- m** Performance of services or membership or fundraising solicitations by related organization(s)
- n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)
- o** Sharing of paid employees with related organization(s)

- p** Reimbursement paid to related organization(s) for expenses
- q** Reimbursement paid by related organization(s) for expenses

- r** Other transfer of cash or property to related organization(s)
- s** Other transfer of cash or property from related organization(s)

	Yes	No
<b>1a</b>		No
<b>1b</b>		No
<b>1c</b>	Yes	
<b>1d</b>		No
<b>1e</b>		No
<b>1f</b>		No
<b>1g</b>		No
<b>1h</b>		No
<b>1i</b>		No
<b>1j</b>		No
<b>1k</b>		No
<b>1l</b>	Yes	
<b>1m</b>		No
<b>1n</b>	Yes	
<b>1o</b>	Yes	
<b>1p</b>		No
<b>1q</b>	Yes	
<b>1r</b>		No
<b>1s</b>		No

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

(a) Name of other organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
<b>(1)</b> CAROLINE & SIGMUND SCHOTT FUND	C	1,265,000	CASH

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

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

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

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

**Part VII Supplemental Information**

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

Identifier	Return Reference	Explanation	
------------	------------------	-------------	--

-->