

**CitizenAudit.org**

**Return of Private Foundation  
or Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation**

**2009**

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning **2009**, and ending \_\_\_\_\_

G Check all that apply:  Initial return  Initial Return of a former public charity  Final return  
 Amended return  Address change  Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Lumina Foundation for Education 30 S Meridian Street #700 Indianapolis, IN 46204	<b>A</b> Employer identification number 351813228
		<b>B</b> Telephone number (see the instructions) 317-951-5300
		<b>C</b> If exemption application is pending, check here <input type="checkbox"/> <b>D 1</b> Foreign organizations, check here <input type="checkbox"/> <b>2</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
<b>H</b> Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation	<b>I</b> Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 1098556458.	<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc. received (att sch)				
2	Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
3	Interest on savings and temporary cash investments	7,688.	7,688.	7,688.	
	Dividends and interest from securities	18,583,272.	18,852,541.	18,852,541.	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain/(loss) from sale of assets not on line 10	-89,919,956.			
b	Gross sales price for all assets on line 6a 457631621.				
7	Capital gain net or (loss) See Stmt # 20				
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: cost of goods sold				
c	Gross profit/(loss) (att sch)				
11	Other income (attach schedule) See Stmt # 21		-890,878.	-890,878.	
12	<b>Total.</b> Add lines 1 through 11	-71,328,996.	17,969,351.	17,969,351.	
13	Compensation of officers, directors, trustees, etc	2,114,017.	589,992.		1,522,508.
14	Other employee salaries and wages	3,433,485.	473,801.		3,212,048.
15	Pension plans, employee benefits	2,957,619.	204,367.		1,532,467.
16a	Legal fees (attach schedule) See St. 2	187,438.	32,107.		134,418.
b	Accounting fees (attach sch) See St 3	100,522.	25,130.		75,392.
c	Other prof fees (attach sch) See St 4	4,908,975.	2,202,687.		2,586,054.
17	Interest See Stmt # 22		238,855.		
18	Taxes (attach schedule)(see instr.) See Stm. 5	2,616,155.	131,340.		
19	Depreciation (attach sch) and deple See Stmt # 23	424,467.	58,218.		
20	Occupancy	551,199.	68,956.		479,941.
21	Travel, conferences, and meetings	1,059,187.	27,038.		1,033,694.
22	Printing and publications	482,462.	6,256.		478,678.
23	Other expenses (attach schedule) See Statement 6	905,247.	5,351,445.		782,470.
24	<b>Total operating and administrative expenses.</b> Add lines 13 through 23	19,740,773.	9,410,192.		11,837,670.
25	Contributions, gifts, grants paid Part XV	55,676,228.			52,089,887.
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	75,417,001.	9,410,192.	0.	63,927,557.
27	Subtract line 26 from line 12:				
a	<b>Excess of revenue over expenses and disbursements</b>	-146,745,997.			
b	Net investment income (if negative, enter -0-)		8,559,159.		
c	<b>Adjusted net income</b> (if negative, enter -0-)			17,969,351.	

ENVELOPE NOV 15 2010 POSTMARK DATE

e Stmt # 19

REVENUE SCANNED

NOV 23 2010 ADMINISTRATIVE EXPENSES

RECEIVED  
NOV 18 2010  
IRS-OSC

3  
614

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
ASSETS	1	Cash – non-interest-bearing			
	2	Savings and temporary cash investments	115,817,934.	22,683,640.	22,683,640.
	3	Accounts receivable	1,636,220.		
		Less: allowance for doubtful accounts	1,170,243.	1,636,220.	1,636,220.
	4	Pledges receivable			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach sch)			
		Less: allowance for doubtful accounts			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	1,435,093.	1,334,243.	1,334,243.
	10a	Investments – U.S. and state government obligations (attach schedule) Statement 7	93,272,191.	183,544,824.	183,544,824.
	b	Investments – corporate stock (attach schedule) Statement 8	404,608,631.	457,557,872.	457,557,872.
	c	Investments – corporate bonds (attach schedule) Statement 9		53,529,463.	53,529,463.
	11	Investments – land, buildings, and equipment basis			
	Less: accumulated depreciation (attach schedule)				
12	Investments – mortgage loans				
13	Investments – other (attach schedule) Statement 10	371,844,645.	377,188,495.	377,188,495.	
14	Land, buildings, and equipment: basis	4,300,485.			
	Less: accumulated depreciation (attach schedule) See Stmt 11	3,218,784.	1,470,961.	1,081,701.	
15	Other assets (describe)				
16	<b>Total assets</b> (to be completed by all filers – see instructions Also, see page 1, item I)	989,619,698.	1,098,556,458.	1,098,556,458.	
LIABILITIES	17	Accounts payable and accrued expenses	2,246,092.	5,697,775.	
	18	Grants payable	21,360,509.	26,967,701.	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe)			
	23	<b>Total liabilities</b> (add lines 17 through 22)	23,606,601.	32,665,476.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>				
	24	Unrestricted	966,013,097.	1,065,890,982.	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, building, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds.				
30	<b>Total net assets or fund balances</b> (see the instructions)	966,013,097.	1,065,890,982.		
31	<b>Total liabilities and net assets/fund balances</b> (see the instructions)	989,619,698.	1,098,556,458.		

Part III: Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	966,013,097.
2	Enter amount from Part I, line 27a	2	-146,745,997.
3	Other increases not included in line 2 (itemize) See Statement 12	3	246,623,882.
4	Add lines 1, 2, and 3	4	1,065,890,982.
5	Decreases not included in line 2 (itemize)	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) – Part II, column (b), line 30	6	1,065,890,982.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)

(b) How acquired  
P — Purchase  
D — Donation

(c) Date acquired  
(month, day, year)

(d) Date sold  
(month, day, year)

1a	See Stmt # <b>24</b>		
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss). <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>	2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	64,345,923.	1,236,336,284.	0.052046
2007	60,913,704.	1,406,464,295.	0.043310
2006	58,713,698.	1,279,335,144.	0.045894
2005	55,939,649.	1,101,056,382.	0.050805
2004	44,826,223.	1,022,385,905.	0.043845

2	Total of line 1, column (d)	2	0.235900
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.047180
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,009,983,344.
5	Multiply line 4 by line 3	5	47,651,014.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	85,592.
7	Add lines 5 and 6	7	47,736,606.
8	Enter qualifying distributions from Part XII, line 4	8	63,945,527.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

**Part VI Excise Tax Based on Investment Income** (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	85,592.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	85,592.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		5	85,592.
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	1,252,288.	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,252,288.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,166,696.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <u>500,000.</u> Refunded <u>Refunded</u>	11	666,696.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file <b>Form 1120-POL</b> for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <u>\$ 0.</u> (2) On foundation managers <u>\$ 0.</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <u>\$ 0.</u>		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities.</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the instrument.</i> See Stmt # 29	X	
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions). <u>DE IN</u>		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

**Part VII-A. Statements Regarding Activities Continued**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions) . . . . .	See Stmt # <b>25</b>	11	X	
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? . . . . .		12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .		13	X	
Website address . . . . . ▶ <u>www.luminafoundation.org</u>					
14	The books are in care of ▶ <u>David A. Brown</u>	Telephone no ▶ <u>317-951-5300</u>			
Located at ▶ <u>30 S. Meridian Street</u>		ZIP + 4 ▶ <u>46204</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . .	N/A	▶ <input type="checkbox"/> N/A		
and enter the amount of tax-exempt interest received or accrued during the year . . . . .		▶ <u>15</u>	▶ <input type="checkbox"/> N/A		

**Part VII-B. Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

		Yes	No
<b>1 a</b>	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here . . . . . ▶ <input type="checkbox"/>	1b	X
<b>c</b>	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? . . . . .	1c	X
<b>2</b>	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
<b>a</b>	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes,' list the years ▶ <u>20 08</u> , 20__ , 20__ , 20__ . . . . .		
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions) . . . . .	2b	X
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20__ , 20__ , 20__ , 20__ . . . . .		
<b>3 a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
<b>b</b>	If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) . . . . .	3b	X
<b>4 a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	X
<b>b</b>	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? . . . . .	4b	X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No
- (3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No
- (4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).  Yes  No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

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

Organizations relying on a current notice regarding disaster assistance check here

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

See Stmt # 26  Yes  No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes  No

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

If 'Yes' to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

Yes  No

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

7b N/A

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

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

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement # 13	0	2,114,017.	334,778.	7,550.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 14	0	741,065.	170,808.	7,800.

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

24

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
See Statement # 15		
		2,527,209.
Total number of others receiving over \$50,000 for professional services		2

**Part IX-A** Summary of Direct Charitable Activities

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

	Expenses
1 Conferences and Convenings Statement # 16	877,034.
2 Research and Publications Statement # 16	1,754,067.
3 Philanthropy Statement # 16	438,517.
4 Technical Assistance Statement 16	1,315,550.

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

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

Total. Add lines 1 through 3

BAA



**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	978,034,664.
b	Average of monthly cash balances.	1b	45,739,693.
c	Fair market value of all other assets (see instructions)	1c	1,638,630.
d	<b>Total</b> (add lines 1a, b, and c)	1d	1,025,412,987.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	49,186.
3	Subtract line 2 from line 1d	3	1,025,363,801.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	15,380,457.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,009,983,344.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	50,499,167.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	50,499,167.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	85,592.
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	85,592.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	50,413,575.
4	Recoveries of amounts treated as qualifying distributions	4	2,020,651.
5	Add lines 3 and 4	5	52,434,226.
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	52,434,226.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1a	63,927,557.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	17,970.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	63,945,527.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	85,592.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	6	63,859,935.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				52,434,226.
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only.			42,424,160.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 63,945,527.				
a Applied to 2008, but not more than line 2a			42,424,160.	
b Applied to undistributed income of prior years (Election required – see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2009 distributable amount				21,521,367.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0.		
d Subtract line 6c from line 6b. Taxable amount – see instructions.		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount – see instructions.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010.				30,912,859.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9) N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . .

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

	Tax year				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities.					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test - enter:					
(1) Value of all assets . . . . .					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
c 'Support' alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 **Information Regarding Foundation Managers:**  
 a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )  
 None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.  
 None

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:**  
 Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

See Statement **27**

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

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

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

See Statement for Line 2a

**Part XV: Supplementary Information** (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See statement # 17				52,089,887.
<b>Total</b>				▶ 3a 52,089,887.
b Approved for future payment See Statement # 18				27,085,862.
<b>Total</b>				▶ 3b 27,085,862.

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue.					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	7,688.	
4 Dividends and interest from securities			14	18,583,272.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-89,919,956.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e)				-71,328,996.	
13 Total. Add line 12, columns (b), (d), and (e)					13 -71,328,996.

(See worksheet in the instructions for line 13 to verify calculations.)

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See the instructions )
N/A	

**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash
- (2) Other assets

b Other transactions:

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

	Yes	No
1 a (1)		X
1 a (2)		X
1 b (1)		X
1 b (2)		X
1 b (3)		X
1 b (4)		X
1 b (5)		X
1 b (6)		X
1 c		X

d If the answer to any of the above is 'Yes,' complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

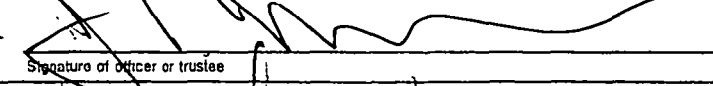
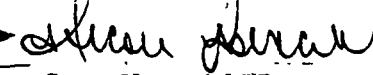
(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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

b If 'Yes,' complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

SIGN HERE	 Signature of officer or trustee	11/12/10 Date	President & CEO Title
	 Preparer's signature	11/11/10 Date	Check if self-employed <input type="checkbox"/> N/A Preparer's identifying number (See Signature in the instrs)
	Firm's name (or yours if self-employed), address, and ZIP code Crowe Horwath LLP 3815 River Crossing Parkway, Suite 300 Indianapolis, IN 46240-0977	EIN N/A	
	Phone no. 317-569-8989		

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
Part 1

Net Gain/(Loss)  
Lines 6a and Line 7

Statement Number 1

Description	(A) Revenue Per Books	(B) Net Investment Income	(c) Adjusted Net Income
See attached Northern Trust Report Realized Gain/Loss Detail	\$ (89,919,956)		
See attached Northern Trust Tax Letters Part IV Statement Number 20		\$ (104,044,464)	
Information on K-1s		(4,053,505)	
Elimination of Loss		108,097,969	
	<u>\$ (89,919,956)</u>	<u>\$ (0)</u>	

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
Part 1

Line 16a

Legal Fees

Statement Number 2

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
	\$ 187,438	\$ 32,107	\$ -	\$ 134,418
Legal Fees	\$ 187,438	\$ 32,107	\$ -	\$ 134,418



Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
Part 1

Line 16b

Accounting Fees

Statement Number 3

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
	\$ 100,522	25,130		\$ 75,392
Accounting Fees	<u>\$ 100,522</u>	<u>\$ 25,130</u>	<u>\$ -</u>	<u>\$ 75,392</u>

Lumina Foundation For Education  
 Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
 Part 1

Line 16c

Other Professional

Statement Number 4

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
Publication Research Projects (Consulting for Research, Editing and Publishing)	\$ 362,837	\$	\$ 0	\$ 346,714
Investment Managers, Brokerage, Custodian and Investment Consulting	2,152,538	2,152,538	0	-
Consulting on Employee Development, Benefits & Compensation	3,100	-	0	2,968
Software (consulting for development, enhancements and maintenance)	308,708		0	294,989
Grant Evaluations	116,736	-		111,554
Grant Program Development	1,817,880			1,737,119
General Consulting	147,178	50,149	0	92,712
<b>Total</b>	<b>\$ 4,908,975</b>	<b>\$ 2,202,687</b>	<b>\$ 0</b>	<b>\$ 2,586,054</b>

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF

Taxes

Statement Number 5

Part 1

Line 18

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
Excise Tax Current Year	\$ 149,913	\$ 0	\$ 0	0
Deferred Excise Taxes	2,466,242	0	0	0
Foreign Taxes paid on Tax Letter	0	123,061	0	0
Foreign Taxes paid on K-1s	0	8,279	0	0
Total Taxes	<u>\$ 2,616,155</u>	<u>\$ 131,340</u>	<u>\$ 0</u>	<u>0</u>

<b>Lumina Foundation For Education</b>		<b>Tax ID 35-1813228</b>	
<b>Tax Return for Year Ending</b>		<b>December 31, 2009</b>	
<b>Form 990 PF</b>	<b>Other Expenses</b>		<b>Statement Number 6</b>
<b>Part 1</b>	<b>Line 23</b>		

Description	(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
Insurance Expense	\$ 179,454	\$ 18,480	\$ 0	\$ 160,974
Employee Recruiting	1,678		0	1,678
Equipment Maintenance	217,025	68,326	0	148,699
Seminars & Training	66,582	4,175	0	62,407
Dues	171,733	5,038	0	166,695
Staff Development	1,914		0	1,914
Sponsorships	120,685		0	120,685
Subscriptions and office supplies	27,110	5,117	0	21,993
Miscellaneous Amortization of Computer Software	107,777	593	0	97,425
	11,289		0	0
Other Deductible Expenses - Custodian Tax		550,907	0	0
Informational Letters Expenses on K-1s		4,698,809	0	0
<b>Total Other Expenses</b>	<b>\$ 905,247</b>	<b>\$ 5,351,445</b>	<b>\$ 0</b>	<b>\$ 782,470</b>

<b>Lumina Foundation For Education</b>			<b>Tax ID 35-1813228</b>
<b>Tax Return for Year Ending</b>	<b>December 31, 2009</b>		
<b>Form 990 PF</b>	<b>Investments</b>	<b>Statements Number</b>	<b>7, 8, 9, &amp; 10</b>
<b>Part II</b>	<b>Lines 10, 12, and 13</b>		

	Beginning of year	End of Year	
	(a) Book Value	(b) Book Value	(c) Fair Market Value
Line 10a	\$ 93,272,191	\$ 183,544,824	\$ 183,544,824
Line 10b	404,608,631	457,557,872	457,557,872
Line 10c	0	53,529,463	53,529,463
Line 12	0	0	0
Line 13	371,844,645	377,188,495	377,188,495
	<u>\$ 869,725,467</u>	<u>\$ 1,071,820,654</u>	<u>\$ 1,071,820,654</u>

Investment Report from Northern Trust

<b>Lumina Foundation For Education</b>		<b>Tax ID 35-1813228</b>
<b>Tax Return for Year Ending</b>	<b>December 31, 2009</b>	
<b>Form 990 PF</b>		<b>Statement Number 11</b>
<b>Part II</b>	<b>Line 14</b>	<b>Land, Buildings and Equipment</b>

	Beginning of year		End of Year	
	(a) Book Value	(b) Book Value	(c) Fair Market Value	
		(Net of writeoffs)	(Net of writeoffs)	
Leasehold Improvements	\$ 2,607,646	\$ 2,607,646	\$ 2,607,646	
Accumulated Depreciation	1,724,450	1,988,926	1,988,926	
Furniture and Equipment	1,697,209	1,692,840	1,692,840	
Accumulated Depreciation	1,109,444	1,229,859	1,229,859	
Net Furniture and Equipment	<u>\$ 1,470,961</u>	<u>\$ 1,081,701</u>	<u>\$ 1,081,701</u>	

**Lumina Foundation For Education**  
**Tax Return for Year Ending**

**December 31, 2009**

**Tax ID 35-1813228**

**Form 990 PF**

**Statement Number 12**

**Part III Line 3 and 5 Increases/Decreases on part of income**

Unrealized Investment Gain	\$	385,883,023
Unrealized Investment Loss		139,259,141
Net Unrealized Gain	\$	<u>246,623,882</u>

Part VIII

Information About Officers, Directors, Trustees

Statement Number

13

Line 1 Officers and Directors

(a)	(b)	(c)	(d)	(e)
Name and Address Note (1)	Title/ Ave Hours Worked Per Week Note (2)	Total Paid Compensation	Deferred Compensation and Employee Benefit Expense	Expense Account Other Allowances
Gerald L Bepko, Esq	Director	3 40,000	0	0
Norns Darrell Jr, Esq	Director	2 25,500	0	0
James C Lintzenich	Director	3 38,750	0	0
Marie V McDemmond	Director	2 37,250	0	0
John M Mutz	Director	3 48,750	0	0
J Bonnie Newman	Director	2 35,750	0	0
Edward R Schmidt, Esq	Director	1 9,125	0	0
Michael L Smith	Director	3 37,750	0	0
Randolph H. Waterfield Jr	Director	1 19,250	0	0
Frank D Alvarez	Director	3 36,750	0	0
Laura Palmer Noone	Director	2 31,250	0	0
Belle Wheelan	Director	1 18,375	0	0
Mark Yudof	Director	1 7,750	0	0
F Joseph Loughrey	Director	2 29,875	0	0
<b>Subtotal for Directors</b>		<u>416,125</u>	<u>0</u>	<u>0</u>
<b>Officers</b>				
Jamie P Merisotis	President & CEO	40+ 413,906	75,599	1,320
J David Maas	Sr Vice-President, Treasurer & CFO	40+ 237,283	64,720	1,395
Juan Suarez	Sr Vice-President - External Affairs	40+ 237,032	24,789	1,320
James Applegate	Sr Vice-President - Programs	40+ 233,923	42,653	1,320
Holiday McKiernan	Sr Vice-President, Secretary, and General Counsel	40+ 238,767	81,000	1,320
Nathan Fischer	Chief Investment Officer	40+ 336,982	46,017	875
		<u>1,697,892</u>	<u>334,778</u>	<u>7,550</u>
<b>Totals for Directors and Officers</b>		<u>2,114,017</u>	<u>334,778</u>	<u>7,550</u>
	263,457	See Note 4	See Note 5	See Note 6



Notes:

1) Address for all Directors and Officers is 30 South Meridian Street, Suite 700, Indianapolis, IN 46204

2) Director compensation is based on the number of Board and committee meetings attended during the year Actual amounts paid fluctuate among members based on their assignments

3) Directors Mr Schmidt retired April 2009 (after attending meetings in January - April), Ms Wheelan and Mr Loughrey were elected in April 2009 and Mr Yudof was elected in June 2009 Mr Fischer resigned in July 2009

4) Total Paid Compensation

Officers' compensation is set by a Committee of the Board composed entirely of independent directors who utilize compensation data of comparable private foundations and grantmaking institutions when establishing Executive and Director compensation to ensure that it is appropriate and reasonable The Committee engages outside legal and compensation consultants to advise it

5) Benefits and Deferred Compensation

Benefits and Deferred Compensation include Employer 401(k) matching funds (\$65,783 ) and officer contributions for 401(k) and 457 plans (\$ 129,530)

6) Expense Account and Other Allowances

Directors and Officers do not have an expense account or allowance They are reimbursed for actual business expenses The amount reflected in column "e" includes parking and miscellaneous taxable and non-taxable work related expenses

The Directors and Officers of the Foundation are responsible for managing assets of approximately \$1 billion to advance the Foundation's charitable mission of expanding access and success in postsecondary education In 2009, the assets increased 11 percent (after payment of grant and operational expenses) from \$ 990 million to \$ 1.1 billion Investment earnings supported the grants payout of \$ 52 million

In addition to managing the assets and the grant portfolio, the Foundation leaders exercised oversight of the ambitious agenda of activities to expand the impact of grants, including the dissemination of research through grants and publications, a robust web site, and strategic media and public outreach The Foundation leaders hold the Foundation to high standards of transparency and accountability for the effectiveness of its work by supporting a series of external evaluations, publishing an annual report and posting evaluation information on its web site

Lumina Foundation For Education  
Form 990 PF

Tax ID 35-1813228

Tax Return for Year Ending  
Information About Officers, Directors, Trustees  
Highly Paid Staff

December 31, 2009

Part VIII

Statement Number 14

Line 2

Staff

(a)

(b)

(c)

(d)

(e)

Name and Address Note (1)	Title	Ave Hours Worked Per Week	Total Paid Compensation	Total Employee Benefit Expense	Expense Account Other Allowances Note (2)
Indira Anand	Director of Information Technology	40	122,350	26,775	1,600
Sam Cargile	Vice-President for Grantmaking	40	168,590	35,440	1,500
Eileen Scott	Sr. Investment Officer	40	184,176	32,867	1,600
Mary Williams	Sr. Evaluation Director	40	120,454	35,669	1,600
Dewayne A. Matthews	Vice-President for Policy and Strategy	40	145,496	40,057	1,500
			<u>741,065</u>	<u>170,808</u>	<u>7,800</u>

Notes:

1) Address for all staff is 30 South Meridian Street, Suite 700 Indianapolis, IN 46204

2) Staff does not receive an expense account or allowance. They are reimbursed for actual Business Expenses. The amount listed in column E is for parking (\$7,500.00 ) and miscellaneous taxable and non-taxable payments.

<b>Lumina Foundation For Education</b>		<b>Tax ID 35-1813228</b>
<b>Form 990 PF</b>		
<b>Tax Return for Year Ending</b>		<b>December 31, 2009</b>
<b>Part VIII</b>	<b>Information About Officers, Directors, Trustees Highly Paid Staff and Contractors</b>	<b>Statement Number 15</b>
<b>Line 3</b>	<b>Contractors</b>	

(a) Name and address	(b) Type of Service	(c) Compensation
Northern Trust Company 50 S. LaSalle Street Chicago, IL 60603	Custodial and investment reporting	\$ 818,959
The Bridgespan Group 535 Boylston Street, 10th Floor Boston, MA 02119	Program Expansion (Achieving the Dream)	615,247
Len Ventures, LLC The Presido Building 36, Suite 220 San Francisco, CA 94129	Program Development	384,719
Albourne American, LLC 655 Montgomery Street, Suite 1910 San Francisco, CA 94111	Investment Consulting	360,000
Southeastern Asset Management 6410 Poular Avenue, Suite 900 Memphis, TN 38199	Investment Manager	<u>348,284</u>
		<u>\$ 2,527,209</u>

<b>Lumina Foundation For Education</b>		<b>Tax ID 35-1813228</b>	
<b>Form 990 PF</b>			
<b>Part IX - A</b>	<b>Tax Return for Year Ending</b>	<b>December 31, 2009</b>	
	<b>Summary of Direct Charitable Activities</b>	<b>Statement Number</b>	<b>16</b>
<b>Line 1</b>	<b>Direct Charitable Activities</b>		

**Description**

Introduction – Lumina Foundation for Education achieves its charitable mission by making grants designed to expand access to and success in postsecondary education. The foundation also engages in direct charitable activities that extend its effectiveness well beyond the absolute dollar value of these grants. Statements are not a report of mere activity, this report summarizes highlights among key categories of such activities that resulted in discernible impact in 2009. The Foundation is actively involved in the policy arena, but does not engage in lobbying activities. Specifically, the Foundation adheres to the requirements set forth in Section 4945 of the Internal Revenue Code.

In addition to making grants to further the Foundation’s educational and charitable goals, Lumina also devotes a portion of its operating expenses to direct charitable activities. These direct charitable activities are work Foundation staff lead or direct that further Lumina’s goal of dramatically increasing the percentage of Americans with high-quality degrees and credentials. This work focuses on supporting effective practice, building public will, and promoting public policy.

Within building effective practice Foundation staff provide grantees with technical assistance, advice and counsel. This assistance includes, but is not limited to, a wide array of efforts that are designed to provide grantees with networking and learning opportunities, with counsel on program design and development, with access to research and analysis, with support in communication strategies and implementation, and with counsel on capacity building. All of these staff driven efforts are designed to provide grantees with the necessary assistance that can lead the work to impact and sustainability.

The Foundation staff is involved in the philanthropic sector. Lumina believes it is important for the Foundation to contribute its expertise and time to the sector.

To build the public’s will - to change hearts and minds around the issues of access and attainment and the urgency of increasing degree attainment in the United States to 60% by 2025 – necessitates a focused and staff driven communication model that includes a variety of communication vehicles and convenings. Because of the unique role Lumina Foundation can play in bringing together stakeholders around higher education issues of preparation, attainment and institutional and system productivity, during 2009 the Foundation continued to enhance its convening function. Strategic convenings were planned and executed with clear defined objectives and outcomes that lead the way to issue refinement, exploratory work and the development of new ideas. The Foundation also produced 9 e-newsletters, each issue begin disseminated to approximately 13,000 individuals, higher education leaders, and stakeholders.

The Foundation’s capacity to work in public policy was enhanced in 2009 with the dedication of staff time and financial resources to nonpartisan research and analysis necessary to begin to develop a policy issue agenda that provided a way to frame Lumina’s thinking. This research resulted in significant publications. This work provided additional clarity on the issues that need to be addressed so that the Foundation’s goal of increased degree attainment can be achieved.

<b>Lumina Foundation For Education</b>	<b>Tax Return for Year Ending</b>	<b>Tax ID 35-1813228</b>
		<b>December 31, 2009</b>
<b>Form 990 PF</b>		<b>Statement Number 17</b>
<b>Part XV</b>	<b>Line 3 a</b>	<b>Grants and Contributions Paid during the Year</b>

All of the following organizations are classified as publicly supported charities. Lumina Foundation makes grants to organizations that are classified as tax-exempt under section 501(c)(3) of the Internal Revenue Code and as public charities under section 509(a)(1), (2), or (3) of the Code, or to public organizations that are designated under section 170(c) of the Code. Please note that Lumina Foundation for Education does not make grants to (a) supporting organizations controlled by disqualified persons to Lumina, or (b) Type III supporting organizations that are not functionally integrated Type III supporting organizations (as such terms are defined in the Internal Revenue Code)

See the attached Annual Report Financial Information for Grant detail by Theme. \$ 50,562,213

See the attached Annual Report Financial Information for Special Programs 1,257,826

	Purpose of grant or contribution	Amount
<b>Plus the following Grants for Miscellaneous grants.</b>		
ACE Mentor Program	General Support	375
American Camp Association	General Support	2,500
American Cancer Society	General Support	5,000
American Heart Association	General Support	1,000
American Indian College Fund	General Support	2,500
Archdiocese of Indianapolis	General Support	5,000
Asian American Alliance	General Support	3,000
Ball State University	General Support	1,000
Barbara K. Townsend Memorial Scholarship Fund	General Support	500
Building Tomorrow	General Support	250
Carmel Clay Education Foundation	General Support	1,000
Center Grove Education Foundation	General Support	1,000
Central Indiana Community Foundation	General Support	4,500
Charter School Service Center	General Support	500
Christian Help, Inc	General Support	500
City of Bloomington Community and Family Resources	General Support	1,000
Coalition for Homelessness Intervention and Prevention	General Support	250
Community Foundation of Greater Lafayette	General Support	1,000
Community Foundation of Morgan County	General Support	2,500
Council on Foundations	General Support	40,500
CUMNS Kids	General Support	1,000
Delta Sigma Theta Sorority, Inc	General Support	3,000
Dress for Success Indianapolis	General Support	2,950
Emerging Pearls Foundation	General Support	2,500
Evangelical United Methodist Church	General Support	1,500
Evansville-Vanderburgh County Human Relations Commission	General Support	2,500
Family Services	General Support	300
Giving Sum	General Support	2,000
Greater Indianapolis Progress Committee	General Support	1,500
Greenwich Roundtable	General Support	5,000
Guardian Scholars	General Support	5,000
Guild, Inc	General Support	200
Habitat for Humanity	General Support	1,500
Hamilton County Humane Society	General Support	3,000
Hendricks County Community Foundation	General Support	2,500
Indiana Healthy Marriage and Family Coalition	General Support	5,000
Indiana Sports Corporation	General Support	1,500
Indiana State University	General Support	5,000
Indianapolis Professional Association	General Support	2,000
Indy Reads	General Support	3,300
IUPUI	General Support	250
Lapel High School	General Support	500
Loop for Life Foundation	General Support	250
Lupus Foundation	General Support	500
McCoy, Inc	General Support	2,500
Metropolitan School District of Lawrence Township	General Support	200
Michigan Maritime Museum	General Support	250
MSD of Wayne Township	General Support	444
National Multiple Sclerosis Society	General Support	200
Outreach Indiana	General Support	250
Philanthropy Roundtable	General Support	10,000
Play Ball Indiana	General Support	2,500

<b>Lumina Foundation For Education</b>	<b>Tax Return for Year Ending</b>	<b>Tax ID 35-1813228</b>
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**Purpose of grant  
or contribution**      **Amount**

Power Soccer of Indy	General Support	2,500
SACUBO	General Support	1,000
Scleroderma Foundation/Tri-State	General Support	100
Special Olympics Indiana	General Support	435
St. Joseph Catholic Church/Providence Cristo Rey HS	General Support	2,500
St. Jude's Children's Research Hospital	General Support	1,000
St. Therese - Little Flower Roman Catholic Church	General Support	3,000
Susan G. Komen for the Cure	General Support	1,000
Teacher's Treasures	General Support	3,000
Teb's Troops	General Support	250
Tech Point Foundation	General Support	3,200
The Brotherhood Sister SOL	General Support	1,000
The Leukemia & Lymphoma Society, Indiana Chapter	General Support	5,000
The Salvation Army	General Support	1,000
Thurgood Marshall College Fund	General Support	2,500
United Christmas Service	General Support	750
United Way of Central Indiana	General Support	74,164
Vigo County Education Foundation	General Support	2,980
William J. Clinton Foundation	General Support	19,000
YMCA of Central Indiana	General Support	1,000
Youth Leadership Academy of Madison County	General Support	1,500
<b>Grand Total Grants Disbursed</b>		<b><u>\$ 52,089,887</u></b>

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access 5519 STD American Student Achievement Institute 931 25th Street Columbus, IN 47201  To increase opportunities for low-income, first-generation and minority students to earn college credits in high school	\$1,200,000	\$0	\$500,000	\$0	\$0	\$0	\$0	\$700,000
5863 STD Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790  To evaluate the effectiveness of student information portals and provide recommendations for future development and support of college-access portals	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
5636 STD Finance Project, The 1401 New York Avenue, NW Suite 800 Washington, DC 20005  To provide technical assistance to Breaking the Cycle grantees involved in the Connected by 25 collaborative demonstration projects in Tampa, FL, Indianapolis, IN, and Oakland, CA	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
5897 STD Cities at Peace, Inc 104 West 27th Street, 12th Floor New York, NY 10001  To research, document and disseminate the key factors for City at Peace's success in advancing high school graduation and college enrollment	\$72,000	\$0	\$0	\$0	\$0	\$0	\$0	\$72,000
5861 STD Board of Trustees of State Institutions of Higher Learning 3825 Ridgewood Road Suite 930 Jackson, MS 39211  To support College Goal SundaySM 2009-2011 in Mississippi	\$80,000	\$0	\$40,000	\$0	\$0	\$0	\$0	\$40,000

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access								
5322 STD Connecticut Association of Professional Financial Aid Administrators, Inc. Manchester Community College Great Path, MS #11 PO Box 1046 Manchester, CT 06045	\$24,100	\$0	\$24,100	\$0	\$0	\$0	\$0	\$0
To implement College Goal SundaySM in Connecticut	\$65,800	\$0	\$65,800	\$0	\$0	\$0	\$0	\$0
5256 STD Louisiana Student Financial Assistance Commission PO Box 91202 Baton Rouge, LA 70821	\$10,000	\$0	\$10,000	\$0	\$0	\$0	\$0	\$0
To implement College Goal SundaySM in 2008 through 2010 in Louisiana	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$10,000
5270 STD Massachusetts Association of Student Financial Aid Administrators P O Box 66003 Auburndale, MA 02466-0001	\$0	\$3,375	\$3,375	\$0	\$0	\$0	\$0	\$0
To continue support to the College Goal SundaySM program from 2008 through 2010 in Massachusetts	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5901 STD Massachusetts Higher Education Assistance Corporation 100 Cambridge Street Suite 1600 Boston, MA 02114	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
To extend College Goal SundaySM in Washington, DC, into 2009	\$25,000	\$0	\$15,000	\$0	\$0	\$0	\$0	\$10,000
5891 STD Minnesota Minority Education Partnership, Inc 2233 University Avenue, West Suite 220 Saint Paul, MN 55114-1698	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
To continue College Goal SundaySM in Minnesota for 2008 - 2011	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0



**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access								
5615 STD National Association of Student Financial Aid Administrators 1101 Connecticut Avenue, Northwest Suite 1100 Washington, DC 20036-4374	\$100,000	\$0	\$0	\$100,000	\$0	\$0	\$0	\$0
To fund and expand ongoing College Goal SundaySM activities from July 1, 2008, through December 31, 2008								
5991 STD New Jersey Association of Student Financial Aid Administrators Brookdale Community College 765 Newman Springs Road Lincroft, NJ 07061	\$25,000	\$0	\$15,000	\$0	\$0	\$0	\$0	\$10,000
To continue College Goal SundaySM in New Jersey for 2009-2011								
4611 STD Northwest Education Loan Association 190 Queen Anne Avenue North, Suite 300 Seattle, WA 98109	\$12,000	\$0	\$12,000	\$0	\$0	\$0	\$0	\$0
To support College Goal SundaySM 2006-2009 in Washington								
5293 STD Rhode Island Student Loan Authority 560 Jefferson Boulevard Suite 200 Warwick, RI 02886	\$43,200	\$0	\$6,000	\$0	\$0	\$0	\$0	\$37,200
To implement College Goal SundaySM in Rhode Island								
5996 STD Scholarship America 160 South 68th Street West Des Moines, IA 50266-9305	\$45,000	\$0	\$30,000	\$0	\$0	\$0	\$0	\$15,000
To implement College Goal SundaySM in Iowa for 2009-2011								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Access</b>								
4609 STD South Carolina Commission on Higher Education 1333 Main Street Suite 200 Columbia, SC 29201	\$45,000	\$0	\$45,000	\$0	\$0	\$0	\$0	\$0
To support College Goal Sunday SM 2007-2009 in South Carolina								
6000 STD Southeastern Association of Educational Opportunity Program Personnel, Inc 75 Piedmont Avenue, Northeast Suite 408 Atlanta, GA 30303-2518	\$35,300	\$0	\$35,300	\$0	\$0	\$0	\$0	\$0
To implement College Goal Sunday SM in Georgia for 2009-2010								
5328 STD State of Alaska 800 East Dimond Boulevard, Suite 200 Anchorage, AK 99515-2049	\$10,000	\$0	\$10,000	\$0	\$0	\$0	\$0	\$0
To continue support for College Goal SundaySM in Alaska								
5251 STD Student Assistance Foundation of Montana 2500 Broadway Helena, MT 59601	\$10,000	\$0	\$10,000	\$0	\$0	\$0	\$0	\$0
To continue support for College Goal SundaySM in Montana from 2008 to 2010								
5250 STD University of Mary 7500 University Drive Bismarck, ND 58504	\$40,000	\$0	\$40,000	\$0	\$0	\$0	\$0	\$0
To implement College Goal SundaySM in North Dakota from 2008 to 2010								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access 4610 STD University of Sioux Falls 1101 West 22nd Street Sioux Falls, SD 57105-1699	\$29,170	\$0	\$29,170	\$0	\$0	\$0	\$0	\$0
To support College Goal SundaySM 2006-2009 in South Dakota.								
5999 STD University of South Florida 4202 East Fowler SOC 107 Tampa, FL 33620	\$25,000	\$0	\$15,000	\$0	\$0	\$0	\$0	\$10,000
To continue College Goal SundaySM in Florida for 2009-2011								
5871 STD Wisconsin Association of Student Financial Aid Administrators 300 Seeward Street P O Box 248 Ripon, WI 54971	\$25,000	\$0	\$15,000	\$0	\$0	\$0	\$0	\$10,000
To continue College Goal SundaySM in Wisconsin for 2009-2011								
5717 STD Council for Opportunity in Education 1025 Vermont Avenue, N W Suite 1025 Washington, DC 20005	\$65,000	\$0	\$65,000	\$0	\$0	\$0	\$0	\$0
To study alternative and innovative approaches to college admission and academic support								
4922 STD Education Writers Association 2122 P Street NW Suite 201 Washington, DC 20037	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To increase the depth and sophistication of news coverage of higher education issues nationwide								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access								
5616 STD FrameWorks Institute 1776 I Street, Northwest 9th Floor Washington, DC 20006	\$141,600	\$0	\$141,600	\$0	\$0	\$0	\$0	\$0
To conduct research on public perceptions of and attitudes toward higher education attainment, and test possible approaches to reshaping public discussion of the attainment issue								
5425 STD Indianapolis Center for Education Entrepreneurship, Inc 407 North Fulton Street Suite 102 Indianapolis, IN 46202	\$175,000	\$0	\$175,000	\$0	\$0	\$0	\$0	\$0
To increase college access by expanding College Summit in high-need high schools throughout Marion County								
5737 STD National College Access Network, Inc 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036	\$340,000	\$0	\$219,700	\$0	\$0	\$0	\$0	\$120,300
To support the National College Access Network's capacity building as an intermediary organization promoting college access								
5978 STD International Center for Innovation in Civic Participation 1776 Massachusetts Avenue, Northwest Suite 201 Washington, DC 20036	\$260,600	\$0	\$140,000	\$0	\$0	\$0	\$0	\$120,600
To support a summer community service model for at-risk youth and to integrate the program within the KnowHow2GO network structure								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
5408 STD Johns Hopkins University Center for Summer Learning Education Building 2800 North Charles Street, Suite 307 Baltimore, MD 21218	\$87,200	\$0	\$87,200	\$0	\$0	\$0	\$0	\$0
To enhance the Summer Youth Program Fund by providing an intentional focus on improving learning outcomes and college access for underserved students in Indianapolis								
5714 STD Center for Nonprofit Excellence 703 South Main Street Suite 200 Akron, OH 44311	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
To conduct a comprehensive formative evaluation of the KnowHow2GO certification process.								
5444 STD Central Indiana Community Foundation 615 North Alabama Street Room 119 Indianapolis, IN 46204	\$2,132,000	\$0	\$572,000	\$0	\$0	\$0	\$0	\$1,560,000
To create the College Readiness Fund, a funding collaborative to improve and expand college access in Marion County								
5888 STD Greater Cincinnati Foundation, The The Robert & Ruth Westheimer Center for Philanthropy 200 West Fourth Street Cincinnati, OH 45202-2602	\$600,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$300,000
To establish the College Readiness Fund, a funding collaborative to improve and expand college access in Cincinnati and Northern Kentucky								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access								
5889 STD Legacy Foundation, Inc 1000 East 80th Place South Tower 302 Merrillville, IN 46410	\$490,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$240,000
To create the College Readiness Fund, a funding collaborative to improve and expand college access in Lake County, Indiana								
5123 STD Education Trust, Inc., The 1250 H Street, Northwest Suite 700 Washington, DC 20005	\$329,800	\$0	\$329,800	\$0	\$0	\$0	\$0	\$0
To serve as a partner in the Making Opportunity Affordable initiative by working with members of the National Association of System Heads to produce improvements in student access and success								
5793 STD National Academy of Sciences 500 Fifth Street, Northwest, 11th Floor Washington, DC 20001	\$300,000	\$0	\$0	\$0	\$0	\$0	\$0	\$300,000
To develop improved measures of productivity within U S higher education								
4472 STD Mancopa County Community College District Foundation 2411 West 14th Street Tempe, AZ 85281-6942	\$116,500	\$0	\$72,750	\$0	\$0	\$0	\$0	\$43,750
To determine what program practices enhance academic achievement and persistence for at-risk high school and college students								
5130 STD University of Indianapolis 1400 East Hanna Avenue Indianapolis, IN 46227-3697	\$98,700	\$0	\$98,700	\$0	\$0	\$0	\$0	\$0
To study institutional and state policies that affect Advanced Placement, International Baccalaureate and dual-credit courses in Indiana								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Access								
4480 STD Washington University in St Louis Center for Social Development George Warren Brown School of Social Work Campus Box 1196 One Brookings Drive St Louis, MO 63130-4899	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
To develop policy recommendations and support for Children's Savings Accounts dedicated to postsecondary education								
5373 STD Women in Government, Ltd. 1319 F Street, Northwest Suite 710 Washington, DC 20004-1153	\$86,800	\$0	\$86,800	\$0	\$0	\$0	\$0	\$0
To assist state policymakers in understanding college access and success issues								
<b>Total for Access</b>	<b>\$7,444,770</b>	<b>\$3,375</b>	<b>\$3,759,295</b>	<b>\$100,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,588,850</b>
Attainment/Retention								
5498 STD American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036	\$300,000	\$0	\$0	\$0	\$0	\$0	\$0	\$300,000
To build policy analysis capacity at the organization to advance the objectives of the Achieving the Dream initiative at the national level								
5680 STD Association for Institutional Research 1435 East Piedmont Drive Suite 211 Tallahassee, FL 32308	\$726,000	\$0	\$500,000	\$0	\$0	\$0	\$0	\$226,000
To develop online institutional research training courses that will help the Achieving the Dream community colleges and others to use data effectively to improve student success.								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention								
4983 STD Board of Trustees of the University of Illinois, The 1901 South First Street Suite A Champaign, IL 61820-7406	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To support the establishment of the Transfer Experience and Advising Mentors program								
4652 STD University of Florida Division of Sponsored Research 219 Grinter Hall Gainesville, FL 32611	\$300,000	\$0	\$0	\$300,000	\$0	\$0	\$0	\$0
To serve as a partner in the Achieving the Dream initiative								
4800 STD WestEd, SF 730 Harrison Street San Francisco, CA 94107	\$58,600	\$0	\$58,600	\$0	\$0	\$0	\$0	\$0
To support the Achieving the Dream Initiative								
5495 STD American Legislative Exchange Council 1101 Vermont Avenue, Northwest 11th Floor Washington, DC 20005	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To create a two-year policy development and communication program to educate state lawmakers about higher education topics								
5622 STD Association of American Colleges and Universities 1818 R Street, Northwest Washington, DC 20009	\$100,000	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000
To work with three state postsecondary education systems to increase the participation and success of underserved students								



**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 5253 STD Association of Public and Land-grant Universities 1307 New York Avenue, Northwest, Suite 400 Washington, DC 20005-4722	\$14,800	\$0	\$14,800	\$0	\$0	\$0	\$0	\$0
To implement and refine a voluntary system of accountability								
5164 STD Baton Rouge Community College 5310 Florida Boulevard Baton Rouge, LA 70806	\$82,000	\$0	\$61,400	\$0	\$0	\$0	\$0	\$20,600
To increase student success by implementing strategies that improve persistence and graduation rates								
5823 STD Board of Regents of the University System of Georgia 270 Washington Street, Southwest Atlanta, GA 30334-1450	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To improve the retention and graduation of African-American males within the University System of Georgia								
5730 STD Board of Trustees of the University of Illinois, The 1901 South First Street Suite A Champaign, IL 61820-7406	\$175,000	\$0	\$0	\$0	\$0	\$0	\$0	\$175,000
To facilitate the dissemination and adoption of best practices in the assessment of college learning outcomes								
5163 STD Bossier Parish Community College Foundation 6220 East Texas Street Bossier City, LA 71111	\$20,600	\$0	\$0	\$0	\$0	\$0	\$0	\$20,600
To increase student success by implementing strategies that improve persistence and graduation rates								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 5950 STD United Way of Central Indiana, Inc P. O. Box 88409 3901 North Meridian Street Indianapolis, IN 46208-0409	\$200,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$100,000
To increase the number of foster youth who complete high school and pursue higher education								
5745 STD Corporation for a Skilled Workforce 900 Victors Way Suite 350 Ann Arbor, MI 48108	\$48,000	\$0	\$48,000	\$0	\$0	\$0	\$0	\$0
To disseminate and promote public, institutional and business policies and practices shown to advance postsecondary access and attainment among Latino immigrant workers in the United States.								
5628 STD Education Commission of the States 700 Broadway, Suite 810 Denver, CO 80203	\$1,005,400	\$0	\$505,400	\$0	\$0	\$0	\$0	\$500,000
To align state and system policies to increase college success for students who require remedial and developmental education								
5029 STD Education Trust, Inc., The 1250 H Street Northwest Suite 700 Washington, DC 20005-5935	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To focus higher education on improving student access and success by engaging in public advocacy								
5477 STD Evergreen State College Foundation, The 2700 Evergreen Parkway, Northwest Olympia, WA 98505-0002	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To support improved postsecondary educational services for Native students in Washington State								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b>								
5858 STD Harlem Children's Zone, Inc 35 East 125th Street New York, NY 10035	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To strengthen the College Success Program.								
5627 STD Higher Education Policy Institute 152 North Third Street Suite 705 San Jose, CA 95112	\$500,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To provide national policy expertise that will enable the federal government, states and institutions to improve rates of college participation and attainment								
5928 STD Indiana Housing and Community Development Authority 30 South Meridian Street Suite 1000 Indianapolis, IN 46204	\$500,000	\$0	\$0	\$0	\$0	\$0	\$0	\$500,000
To improve college access and success rates for parents of Twenty-first Century Scholars and their dependents								
5613 STD Community College of Aurora 16000 East CentreTech Parkway Aurora, CO 80011-9036	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To establish an organization focused on mobilizing the voices of business leaders to stimulate new thinking, strengthen political will, and move policies to increase the number and quality of college graduates								
5837 STD Excelencia in Education, Inc 1752 N Street Northwest 6th Floor Washington, DC 20036	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To increase Excelencia's organizational capacity to better serve Latino students pursuing success in higher education								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention 5454 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036	\$215,000	\$0	\$215,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support for, including but not limited to, building organizational capacity to improve student outcomes in higher education								
5212 STD Kentucky Council on Postsecondary Education 1024 Capital Center Drive Suite 320 Frankfort, KY 40601	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
To develop a statewide strategy to encourage adult learners to pursue a postsecondary education								
5800 STD Low Income Families Empowerment Through Education P O Box 1953 San Leandro, CA 94577	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To help low-income families gain access to, and achieve success in, postsecondary education								
4684 STD Maine Community Foundation 245 Main Street Ellsworth, ME 04605	\$49,400	\$0	\$49,400	\$0	\$0	\$0	\$0	\$0
To help 10,000 Maine workers, with support from their employers, earn two-year or four-year college degrees over the next decade								
5924 STD Big Picture Company, Inc , The 325 Public Street Providence, RI 02905-2340	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000
To develop a replicable pilot program for first-generation college students that increases student knowledge, applied skills and graduation rates								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b>								
5867 STD Board of Trustees of Illinois State University, The Research and Sponsored Programs Campus Box 3040 Normal, IL 61790-3040	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To aid policymakers, higher education officials, and students and their families by studying effects of Illinois' and Georgia's guarantee-tuition laws on college and university productivity and on undergraduate degree attainment								
5775 STD Board of Trustees of the University of Illinois, The Room 364 HAB 506 South Wright Urbana, IL 61801	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0	\$50,000
To examine the effects of the Global Campus academic, service and business models on student persistence, graduation rates, employment and career success								
5435 STD Delta Project on Postsecondary Costs, Productivity and Accountability 1250 H Street, Northwest Suite 700 Washington, DC 20005	\$97,600	\$0	\$97,600	\$0	\$0	\$0	\$0	\$0
To improve productivity and accountability in higher education								
5352 STD Midwestern Higher Education Compact 1300 South Second Street Suite 130 Minneapolis, MN 55454-1079	\$400,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$200,000
To develop group purchasing programs to reduce institutions' cost of procuring energy and providing health benefits to employees and students								

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**Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 5849 STD National Association of College and University Business Officers 1110 Vermont Avenue, Northwest Suite 800 Washington, DC 20005	\$300,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$100,000
To strengthen the capacity of college and university leaders to make higher education more efficient and cost effective								
5497 STD Teachers College of Columbia University Box 174 525 West 120th Street 439 Thorndike Hall New York, NY 10027-6696	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To examine effective policy and implementation design features that make performance funding systems more likely to be adopted by states								
5993 STD Teachers College of Columbia University 525 West 120th Street Box 127 New York, NY 10027	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To produce an increase in Hechinger Institute's capacity to initiate high quality journalism, including an analytical, magazine-style story that examines the University System of Maryland's initiative to increase efficiency and cost effectiveness.								
5517 STD National Center for Educational Accountability 4030-2 West Braker Lane, Suite 200 Austin, TX 78759	\$500,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To build state capacity to share data across educational sectors.								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 2982 STD National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251	\$276,500	\$0	\$276,500	\$0	\$0	\$0	\$0	\$0
To provide a central resource to help states understand and shape increasingly complex patterns of student progress through postsecondary education								
5779 STD National Governors Association Center for Best Practices Hall of the States 444 North Capitol Street Suite 267 Washington, DC 20001-1012	\$0	\$615,000	\$430,500	\$0	\$0	\$0	\$0	\$184,500
To increase awareness of the importance of developing the adult workforce and assist governors in selected states to develop an action plan to increase degree attainment rates among adults								
5159 STD Ohio State University Research Foundation, The 1960 Kenny Road Columbus, OH 43210	\$266,200	\$0	\$266,200	\$0	\$0	\$0	\$0	\$0
To enable undereducated, underemployed adults to earn a postsecondary certificate and remove state and institutional policy barriers that inhibit degree completion								
5905 STD State Higher Education Executive Officers 3035 Center Green Drive Suite 100 Boulder, CO 80301-2251	\$175,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$75,000
To increase states' capacity to make data-driven, results-oriented higher education policy affecting student access and success								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 5600 STD Teachers College of Columbia University 525 West 120th Street Box 127 New York, NY 10027  To support in-depth projects that improve news reporting on higher education finance, community college and international postsecondary attainment issues	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
5769 STD Trustees of Indiana University, The Research and Sponsored Programs 620 Union Drive, Room 618 Indianapolis, IN 46202-5167  To explore and support the educational success of African-American males in high school and college across the state of Indiana	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000
5883 STD Trustees of Indiana University, The P O Box 1847 Bloomington, IN 47402-1847  To develop and implement the Indiana Workforce Intelligence System, a student unit record data system that integrates education and workforce data	\$699,800	\$0	\$0	\$0	\$0	\$0	\$0	\$699,800
5084 STD Trustees of the University of Pennsylvania 3451 Walnut Street Room P-221 Philadelphia, PA 19104  To analyze, disseminate and engage six different institutions in implementing strategies and findings as identified by the National Black Male College Achievement Study	\$249,200	\$0	\$149,200	\$0	\$0	\$0	\$0	\$100,000



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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 4981 STD University of Texas at Austin, The 2609 University Avenue Building UJ49, Suite 3 104 Austin, TX 78712	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To support the development and national launch of the Survey of Entering Student Engagement for community colleges.								
5449 STD University of Toledo Foundation University of Toledo Student African American Brotherhood 2801 West Bancroft Street Scott Park Campus, Mail Stop 400 Toledo, OH 43606-3390	\$325,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$125,000
To conduct an evaluation of the National Student African American Brotherhood program and increase the organization's capacity and sustainability.								
5936 STD W M Corporation 5471 Wisconsin Avenue Suite 300 Chevy Chase, MD 20815	\$400,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$200,000
To underwrite news analyses that explore topics such as the urgent need for higher U S degree attainment rates, especially among underserved student populations								
5696 STD Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 80301-2204	\$100,000	\$0	\$0	\$0	\$0	\$0	\$0	\$100,000
To pilot an accountability project that will provide policymakers and adult learners with consumer information about student outcomes in distance education programs at various institutions								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 5776 STD Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 80301-2204	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To expand the scale and scope of the "Non-traditional No More" grant by adding two states and creating a national network of states to inform the enactment of policies and practices supporting adult learners								
5862 STD Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 80301-2204	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To develop a deeper understanding of the processes of articulation and transfer between community colleges and four-year institutions in order to guide policy and practice within state higher education organizations								
<b>Total for Attainment/Retention</b>	<b>\$10,884,100</b>	<b>\$615,000</b>	<b>\$6,672,600</b>	<b>\$300,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,526,500</b>
<b>Philanthropy Budget</b> 5549 STD Calvert Social Investment Foundation 7315 Wisconsin Avenue Bethesda, MD 20814	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To increase civic participation and community wealth in rural communities of color								
5746 STD Center for Effective Philanthropy, Inc , The 675 Massachusetts Avenue Seventh Floor Cambridge, MA 02139	\$100,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$50,000
To build capacity at the Center for Effective Philanthropy								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Philanthropy Budget								
5887 STD	\$175,000	\$0	\$0	\$0	\$0	\$0	\$0	\$175,000
Community Alliance of the Far Eastside 8902 East 38th Street Indianapolis, IN 46226								
To provide community building and economic development on the far eastside, with the ultimate goal of strengthening educational attainment for students and families.								
6307 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Community Investment Network 2205 Up Above Lane Raleigh, NC 27614								
To support the 2009 Community Investment Network Conference.								
5044 STD	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
Forum for the Future of Higher Education MIT E48-402 238 Main Street Cambridge, MA 02142								
To examine the demographics of future student populations and labor markets								
6308 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Foundation Center, The 79 Fifth Avenue New York, NY 10003-3607								
To support the Foundation's Center's Funding for Education Month programming in June, 2009.								
5870 STD	\$80,000	\$0	\$40,000	\$0	\$0	\$0	\$0	\$40,000
Grantmakers for Education 720 SW Washington Street, Suite 605 Portland, OR 97205								
To provide general operating support to build the organizational capacity of Grantmakers for Education								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Philanthropy Budget								
6088 STD Greenwich Roundtable, Inc., The P O Box 4019 One River Road, Garden Level Cos Cob, CT 06807	\$0	\$49,000	\$49,000	\$0	\$0	\$0	\$0	\$0
To develop and disseminate an alternative investment curriculum guide for foundation chief investment officers								
5195 STD Indiana Grantmakers Alliance, Inc 1100 Symphony Centre 32 East Washington Street Indianapolis, IN 46204-3583	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To build capacity to support grant maker needs and improve effectiveness in philanthropy in Indiana.								
6546 STD Indiana Grantmakers Alliance, Inc 1100 Symphony Centre 32 East Washington Street Indianapolis, IN 46204-3583	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide resources to facilitate and encourage statewide participation of foundation staff and trustees in the Indiana chapter of Emerging Practitioners in Philanthropy, Indiana Blacks in Philanthropy, a corporate grant makers group, an Indianapolis program officers group, and other IGA-sponsored affinity groups around the state								
5597 STD Indianapolis Downtown, Inc 111 Monument Circle Suite 1900 Indianapolis, IN 46204	\$26,000	\$0	\$13,000	\$0	\$0	\$0	\$0	\$13,000
To provide operating support for Indianapolis Downtown, Inc								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Philanthropy Budget								
5947 STD John H Boner Community Center, Inc 2236 East Tenth Street Indianapolis, IN 46201-2089	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To support Indianapolis Public Schools and the city's Super Bowl Legacy Project to implement education, nonprofit and economic development initiatives on the near eastside								
6333 STD Keep Indianapolis Beautiful, Inc 1029 East Fletcher Avenue Suite 100 Indianapolis, IN 46203	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support to Keep Indianapolis Beautiful								
5150 STD Central Indiana Community Foundation 615 North Alabama Street Room 119 Indianapolis, IN 46204	\$285,400	\$0	\$285,400	\$0	\$0	\$0	\$0	\$0
To fund academic and college preparatory programs through the Summer Youth Program Fund								
6530 STD Morgan State University Foundation 1700 East Cold Spring Lane Baltimore, MD 21251	\$0	\$12,000	\$12,000	\$0	\$0	\$0	\$0	\$0
To support the National Association for Equal Opportunity in Higher Education (NAFEO) Kellogg Leadership Fellows' reunion as part of the annual White House Conference on Historically Black Colleges and Universities								
5509 STD New World Foundation 666 West End Avenue Suite 1B New York, NY 10025	\$90,000	\$0	\$55,000	\$0	\$0	\$0	\$0	\$35,000
To build capacity within the Emerging Practitioners in Philanthropy organization								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Philanthropy Budget								
6214 STD New World Foundation 666 West End Avenue Suite 1B New York, NY 10025	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To provide professional development opportunities to young grant makers								
6334 STD OMG Center for Collaborative Learning 1528 Walnut Street, Suite 805 Philadelphia, PA 19102	\$0	\$192,800	\$192,800	\$0	\$0	\$0	\$0	\$0
To contribute to the field of philanthropy an improved understanding of what constitutes foundation effectiveness and how foundations can add value, beyond dollars, to the strategies they support								
6247 STD Philanthropic Research, Inc 4801 Courthouse Street, Suite 220 Williamsburg, VA 23188	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support a project to provide the new 990 tax forms to nonprofit organizations and to implement the GuideStar Exchange Program								
4834 STD Scholarship America 1550 American Boulevard East Suite 155 Minneapolis, MN 55425-1197	\$150,000	\$0	\$0	\$150,000	\$0	\$0	\$0	\$0
To support the Disaster Relief Fund for Postsecondary Education Students								
<b>Total for Philanthropy Budget</b>	<b>\$1,231,400</b>	<b>\$306,800</b>	<b>\$1,075,200</b>	<b>\$150,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$313,000</b>
Preparation Budget								
6528 STD Achieve, Inc 1775 I Street, Northwest Suite 410 Washington, DC 20005	\$0	\$395,700	\$395,700	\$0	\$0	\$0	\$0	\$0
To strengthen the alignment of higher education with college and career-readiness standards.								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Preparation Budget</b>								
6590 STD Center for Law and Social Policy 1015 15th Street Northwest Suite 400 Washington, DC 20005	\$0	\$208,000	\$158,000	\$0	\$0	\$0	\$0	\$50,000
To conduct research on federal non-higher education programs with education and training components, including a state-by-state analysis of how these funds are used and develop relevant policy briefs.								
6598 STD Central Indiana Corporate Partnership Foundation 111 Monument Circle, Suite 1800 P.O. Box 82026 Indianapolis, IN 46204	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To expand access to Advanced Placement professional development for high school teachers in Indiana.								
6036 STD College Entrance Examination Board, The 45 Columbus Avenue New York, NY 10023-6917	\$0	\$118,700	\$118,700	\$0	\$0	\$0	\$0	\$0
To generate national awareness and support for the proposals to improve the federal student aid system that were issued by the Rethinking Student Aid study group in September 2008.								
6386 STD College Entrance Examination Board, The 45 Columbus Avenue New York, NY 10023-6917	\$0	\$215,000	\$215,000	\$0	\$0	\$0	\$0	\$0
To identify effective ways to simplify the Free Application for Federal Student Aid.								
5980 STD National Council of the Young Men's Christian Associations of the USA 101 North Wacker Drive Chicago, IL 60606	\$0	\$5,127,600	\$3,127,600	\$0	\$0	\$0	\$0	\$2,000,000
To manage, expand and integrate the College Goal SundaySM program into the national YMCA movement								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6188 STD Community Foundation for the National Capital Region, The c/o Sponsored Program Fund 1201 15th Street, NW Suite 420 Washington, DC 20005	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the work of the Youth Transition Funders Group								
6290 STD Corporation for Enterprise Development 1200 G Street, NW Suite 400 Washington, DC 20005	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the 2009 National Conference on Children and Youth Savings and showcase the current impact and potential scale of Children's Development Accounts - universal savings accounts for children and youth								
6523 STD DonorsChoose 3047 North Lincoln Avenue Chicago, IL 60657	\$0	\$300,000	\$150,000	\$0	\$0	\$0	\$0	\$150,000
To engage middle school teachers in the KnowHow2GO campaign								
6234 STD Encouragement Services, Inc 5931 West State Road 46 Bloomington, IN 47404	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To create a plan to integrate Encouragement Services, Inc., into the Indiana KnowHow2GO work and the national college access library								
6472 STD First American Land-grant College Organization and Network 3508 South Woods Edge Road Columbia, MO 65203	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the annual FALCON conference focused on student access and success at tribal colleges								



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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget 6134 STD I Have a Dream Foundation 2411 California Street, NW Washington, DC 20008	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support leadership development and increase organizational capacity								
6380 STD Indiana Association of United Ways 3901 North Meridian Street, Suite 306 Indianapolis, IN 46208	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To advance the afterschool movement in Indianapolis and Central Indiana through collaboration with other after school providers and community leaders								
6515 STD Jobs for America's Graduates, Inc 1729 King Street Suite 100 Alexandria, VA 22314	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the JAG National Thought Leader Event to discuss how to close the academic and career achievement gap for at-risk minority students								
5952 STD Academy for Educational Development 1825 Connecticut Avenue, NW Washington, DC 20009-5721	\$0	\$2,600,000	\$868,400	\$0	\$0	\$0	\$0	\$1,731,600
To strengthen and sustain the KnowHow2GO ground campaign by providing technical assistance to state partners, involving additional collaborators and organizing an improved learning community for all partners								
6289 STD Academy for Educational Development 100 Fifth Avenue New York, NY 10011	\$0	\$149,300	\$149,300	\$0	\$0	\$0	\$0	\$0
To support a planning grant for mapping data about college access and success networks								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6600 STD Academy for Educational Development 1825 Connecticut Avenue, NW Washington, DC 20009-5721	\$0	\$667,700	\$417,700	\$0	\$0	\$0	\$0	\$250,000
To continue the process evaluation and evaluation technical assistance for the KnowHow2GO initiative.								
6696 STD Academy for Educational Development 1825 Connecticut Avenue, NW Washington, DC 20009-5721	\$0	\$56,300	\$56,300	\$0	\$0	\$0	\$0	\$0
To coordinate KnowHow2GO technical support provided by Community Partners/Paul Vandeventer and Anthony Macklin								
5934 STD Advertising Council, Inc 815 Second Avenue/42nd Street Ninth Floor New York, NY 10017-4503	\$0	\$1,544,400	\$451,000	\$0	\$0	\$0	\$0	\$1,093,400
To support the KnowHow2GO campaign that encourages more low-income students and their families to take the necessary steps toward postsecondary education								
5954 STD American Council on Education One Dupont Circle, NW Washington, DC 20036-1193	\$0	\$2,305,000	\$768,400	\$0	\$0	\$0	\$0	\$1,536,600
To support in 2009-2011 the KnowHow2GO ground and air campaigns with national and local outreach and communication activities								
6360 STD Board of Regents of the University of Wisconsin System 1738 Van Hise Hall 1220 Linden Drive Madison, WI 53706-1559	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
To develop a sustainable statewide college access network in Wisconsin that will support advocacy and policy								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget 6639 STD Center for Nonprofit Excellence 703 South Main Street Suite 200 Akron, OH 44311	\$0	\$104,500	\$64,500	\$0	\$0	\$0	\$0	\$40,000
To connect findings from the KnowHow2GO evaluation to similar communities of learning practices identified in the Making Opportunity Affordable evaluation								
6354 STD Community Partners 1000 North Alameda Street Suite 240 Los Angeles, CA 90012	\$0	\$95,300	\$95,300	\$0	\$0	\$0	\$0	\$0
To plan for the next phase of KnowHow2GO in the southern California region								
6621 STD Council for Opportunity in Education 1025 Vermont Ave, NW, Suite 900 Washington, DC 20005	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
To improve the reach and effectiveness of KnowHow2GO state networks by integrating TRIO programs on the national and state level								
6361 STD EducationQuest Foundation, Inc P O Box 82552 Lincoln, NE 68501	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
To develop and implement a sustainable statewide college access network in Nebraska that will support advocacy and policy efforts								
6349 STD Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015	\$0	\$93,500	\$93,500	\$0	\$0	\$0	\$0	\$0
To plan for the next phase of KnowHow2GO in Illinois								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Preparation Budget</b>								
6345 STD Indiana Commission for Higher Education 101 West Ohio Street, Suite 550 Indianapolis, IN 46204-4254	\$0	\$115,500	\$115,500	\$0	\$0	\$0	\$0	\$0
To plan for the next phase of KnowHow2GO in Indiana								
6436 STD National College Access Network, Inc 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036	\$0	\$72,200	\$72,200	\$0	\$0	\$0	\$0	\$0
To host an NCAN post-conference day on policy issues and process for the KnowHow2GO learning community								
6346 STD New England Educational Opportunity Association University of Maine EOC & TS Chadbourne Hall Room 318 Room 318 Orono, ME 04469-5713	\$0	\$140,000	\$46,700	\$0	\$0	\$0	\$0	\$93,300
To develop a sustainable college access network in Connecticut that will support advocacy and policy								
6375 STD Northwest Education Loan Association 190 Queen Anne Avenue North, Suite 300 Seattle, WA 98109	\$0	\$58,400	\$58,400	\$0	\$0	\$0	\$0	\$0
To plan for the next phase of KnowHow2GO in Washington								
6173 STD Ohio College Access Network 41 South High Street Suite 1650 Columbus, OH 43215	\$0	\$80,500	\$80,500	\$0	\$0	\$0	\$0	\$0
To provide bridge funding for the Ohio College Access Network to continue as the coordinator for KnowHow2GO								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6355 STD	\$0	\$163,500	\$163,500	\$0	\$0	\$0	\$0	\$0
Ohio College Access Network 41 South High Street Suite 1650 Columbus, OH 43215								
To plan for the next phase of KnowHow2GO in Ohio								
6342 STD	\$0	\$117,700	\$117,700	\$0	\$0	\$0	\$0	\$0
Prichard Committee for Academic Excellence, The P O Box 1658 Lexington, KY 40588-1658								
To plan for the next phase of KnowHow2GO in Kentucky								
6344 STD	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
Scholarship America One Scholarship Way P O Box 297 St Peter, MN 56082								
To develop a sustainable statewide college access network in Iowa that will support advocacy and policy efforts								
6341 STD	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
Student Assistance Foundation of Montana 2500 Broadway Helena, MT 59601								
To develop a sustainable statewide college access network in Montana that will support advocacy and policy efforts								
6343 STD	\$0	\$140,000	\$75,000	\$0	\$0	\$0	\$0	\$65,000
Tennessee Higher Education Commission 404 James Robertson Parkway Suite 1900 Nashville, TN 37243								
To develop a sustainable college access network in Tennessee that will support advocacy and policy								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6482 STD University of North Carolina - Chapel Hill 104 Airport Drive, Suite 2200 CB 1350 Chapel Hill, NC 27599-1350	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
To continue the partnership with the National College Advising Corps and the KnowHow2GO campaign								
6332 STD University of South Florida 4202 East Fowler SOC 107 Tampa, FL 33620	\$0	\$73,900	\$73,900	\$0	\$0	\$0	\$0	\$0
To plan for the next phase and expansion of KnowHow2GO in Florida								
6564 STD What Kids Can Do, Inc P O Box 603252 Providence, RI 02906	\$0	\$870,000	\$290,000	\$0	\$0	\$0	\$0	\$580,000
To manage Lumina's three-year initiative to link national youth-serving organizations to the KnowHow2GO campaign								
6746 STD Marion County Commission on Youth, Inc 3901 North Meridian Street, Suite 201 Indianapolis, IN 46208	\$0	\$60,000	\$60,000	\$0	\$0	\$0	\$0	\$0
To create college access networks within Marion County's public high schools to provide wrap-around services touching on all four steps of KnowHow2GO for students								
6168 STD Martin University, Inc 2171 Avondale Place P O Box 18567 Indianapolis, IN 46218	\$0	\$75,000	\$75,000	\$0	\$0	\$0	\$0	\$0
To provide flood relief funds to Martin University								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6561 STD New America Foundation 1899 L Street NW Fourth Floor Washington, DC 20036	\$0	\$325,000	\$225,000	\$0	\$0	\$0	\$0	\$100,000
To promote policy options that make investing in state-administered 529 college savings plans more appealing for low- and moderate-income families								
6677 STD OMG Center for Collaborative Learning 1528 Walnut Street, Suite 805 Philadelphia, PA 19102	\$0	\$9,100	\$9,100	\$0	\$0	\$0	\$0	\$0
To design a White Paper and McCabe Evaluation report								
6517 STD State of Indiana 151 West Ohio Street Indianapolis, IN 46204	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
To sponsor the Indiana Dropout Prevention Leadership Summit								
6674 STD State of Indiana 151 West Ohio Street Indianapolis, IN 46204	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To coordinate state efforts to increase college access and success by engaging partners and leveraging resources.								
6518 STD United Way of Central Indiana, Inc. P. O. Box 88409 3901 North Meridian Street Indianapolis, IN 46208-0409	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
To support the Community Economic Relief Fund								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6559 STD University of Southern California 3551 Trousdale Parkway, ADM 303 Los Angeles, CA 90089-4019	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the January 2010 conference, "What Matters Now: College Access and Success in the Age of Obama"								
6487 STD What Kids Can Do, Inc P. O. Box 603252 Providence, RI 02906	\$0	\$99,900	\$99,900	\$0	\$0	\$0	\$0	\$0
To bring student-produced research and media to the attention of local and national policymakers and stakeholders								
<b>Total for Preparation Budget</b>								
	\$0	\$17,549,200	\$9,859,300	\$0	\$0	\$0	\$0	\$7,689,900
Productivity Budget								
6366 STD Association of Capitol Reporters and Editors 5 West Hargett Street, Suite 502 Raleigh, NC 27602	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To educate journalists nationally who cover state government about state finance and higher education productivity issues affecting college access and student academic success								
<b>Total for Productivity Budget</b>								
	\$0	\$600,000	\$400,000	\$0	\$0	\$0	\$0	\$200,000
6235 STD Association of Governing Boards of Universities and Colleges 1133 20th Street, NW Suite 300 Washington, DC 20036								
To inform boards and presidents of America's colleges and universities to improve student success rates								



**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget 6126 STD Business Innovation Factory 60 Valley Street, Suite 25 Providence, RI 02909	\$0	\$280,000	\$280,000	\$0	\$0	\$0	\$0	\$0
To map the student experience in higher education in order to put a face on the Lumina Foundation Big Goal and identify opportunities where experiences may be enhanced in order to graduate more students								
6477 STD Carnegie Mellon University 5000 Forbes Avenue Pittsburgh, PA 15213	\$0	\$750,000	\$550,000	\$0	\$0	\$0	\$0	\$200,000
To establish a consortium of community colleges, in collaboration with state agencies and national groups, to enact a large-scale process that increases efficiency in the way instruction is developed, delivered and continuously improved								
6367 STD Cornell University 256 Ives Hall Ithaca, NY 14853-3901	\$0	\$80,500	\$60,500	\$0	\$0	\$0	\$0	\$20,000
To analyze the extent to which non-instructional expenditures impact the persistence and graduation rates of students from different socioeconomic backgrounds and with different academic qualifications								
6170 STD Corporation for a Skilled Workforce 900 Victors Way Suite 350 Ann Arbor, MI 48108	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To present CSW's "Building Tomorrow's Workforce Promoting the Education and Advancement of Hispanic Immigrant Workers in America" research findings at the American Association of Community Colleges' annual convention in April 2009								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6252 STD Education Sector, The 1201 Connecticut Avenue, Northwest Suite 850 Washington, DC 20036	\$0	\$750,000	\$450,000	\$0	\$0	\$0	\$0	\$300,000
To provide research and analysis, strategic communications and policy promotion aimed to reorient the public conversation around higher education to focus on quality of teaching and learning, student attainment and reduced student cost								
6443 STD Education Writers Association 2122 P Street NW Suite 201 Washington, DC 20037	\$0	\$350,000	\$300,000	\$0	\$0	\$0	\$0	\$50,000
To provide training and support for journalists covering higher education and develop a strategic response to a changing media environment								
6325 STD Excelsior College 7 Columbia Circle Albany, NY 12203	\$0	\$58,500	\$58,500	\$0	\$0	\$0	\$0	\$0
To convene The Presidents' Forum to develop recommendations for demonstration projects in order to improve efficiency and encourage better alignment of individual state regulatory requirements, as well as support increased reciprocal agreements among states in order to offer instruction across multi-state boundaries								
6167 STD Institute for Educational Leadership, Inc 4455 Connecticut Avenue, Northwest Suite 310 Washington, DC 20008	\$0	\$40,000	\$40,000	\$0	\$0	\$0	\$0	\$0
To communicate the findings of an evaluative research study of the Educational Policy Fellowship Program								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6271 STD Investigative Reporters and Editors, Inc Missouri School of Journalism 141 Neff Annex Columbia, MO 65211	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support higher education training for journalists at the four-day 2009 IRE conference in Baltimore, Maryland								
6449 STD Bipartisan Policy Center, Inc. 1225 I Street, Northwest Suite 1000 Washington, DC 20005	\$0	\$994,700	\$994,700	\$0	\$0	\$0	\$0	\$0
To help create a next market for higher education innovation through convenings, research and further development of DGREE								
6291 STD CEOs for Cities NFP 177 North State Street, Suite 500 Chicago, IL 60601	\$0	\$240,000	\$240,000	\$0	\$0	\$0	\$0	\$0
To systematically uncover new ideas on how to reduce the cost of getting students into and then out of college with a degree, without sacrificing quality								
6324 STD Delta Project on Postsecondary Costs, Productivity and Accountability 1250 H Street, Northwest Suite 700 Washington, DC 20005	\$0	\$500,000	\$400,000	\$0	\$0	\$0	\$0	\$100,000
To support continued development of data and spending metrics for institutional and state-level cost accountability for Making Opportunity Affordable								
6444 STD Institute for the Study of Knowledge Management in Education 323 Harvard Avenue Half Moon Bay, CA 94019	\$0	\$600,000	\$400,000	\$0	\$0	\$0	\$0	\$200,000
To extend the potential for the online Knowledge Collaborative as the intermediary to encourage and facilitate productivity in higher education								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6460 STD Investigative Reporters and Editors, Inc Missouri School of Journalism 141 Neff Annex Columbia, MO 65211	\$0	\$500,000	\$350,000	\$0	\$0	\$0	\$0	\$150,000
To increase campus coverage of college completion and productivity issues by training student journalists to report on these topics								
6363 STD Midwestern Higher Education Compact 1300 South Second Street Suite 130 Minneapolis, MN 55454-1079	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To develop a pilot model for Midwestern cities that projects how manipulation of different input and throughput variables contributes to closing the credentials gap								
6448 STD National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251	\$0	\$91,100	\$91,100	\$0	\$0	\$0	\$0	\$0
To prepare an updated version of Good Policy, Good Practice Improving Outcomes and Productivity in Higher Education An Implementation Handbook								
6304 STD National Conference of State Legislatures 7700 East First Place Denver, CO 80230-7143	\$0	\$500,000	\$400,000	\$0	\$0	\$0	\$0	\$100,000
To provide state legislators and their education and fiscal policy aides with information, advice, support and professional development aimed at increasing the percentage of Americans with high-quality college degrees and postsecondary credentials								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Productivity Budget</b>								
6593 STD Public Agenda Foundation, The 6 East 39th Street Ninth Floor New York, NY 10016-0112	\$0	\$796,800	\$200,000	\$0	\$0	\$0	\$0	\$596,800
To support the productivity agenda by developing a model for faculty and institutional engagement, and supporting policy and public will building to increase productivity in higher education								
<b>6074 STD</b>								
Social Program Evaluators & Consultants 615 Griswold Street Suite 1505 Detroit, MI 48226-3992	\$0	\$816,000	\$816,000	\$0	\$0	\$0	\$0	\$0
To evaluate the Making Opportunity Affordable initiative								
<b>6635 STD</b>								
Social Program Evaluators & Consultants 615 Griswold Street Suite 1505 Detroit, MI 48226-3992	\$0	\$800,000	\$400,000	\$0	\$0	\$0	\$0	\$400,000
To evaluate Making Opportunity Affordable								
<b>6701 STD</b>								
Tides Center, The P O Box 29907 San Francisco, CA 94129	\$0	\$1,450,000	\$1,450,000	\$0	\$0	\$0	\$0	\$0
To support expansion of Lumina's productivity agenda by managing state contracts and coordinating technical support								
<b>6327 STD</b>								
Western Governors University 4001 South 700 East Suite 700 Salt Lake City, UT 84107-2533	\$0	\$800,000	\$100,000	\$0	\$0	\$0	\$0	\$700,000
To draw and share lessons arising from a newer, technology-enabled approach that unbundles elements of higher education to offer individualized, self-paced instruction that focuses on helping students meet defined learning outcomes								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6364 STD National Governors Association Center for Best Practices Hall of the States 444 North Capitol Street Suite 267 Washington, DC 20001-1012	\$0	\$600,000	\$500,000	\$0	\$0	\$0	\$0	\$100,000
To develop the National Governors Association's capacity to help governors shape policies that increase transparency and accountability in higher education and contribute to increases in numbers of residents educated to meet workforce needs								
6221 STD Public Agenda Foundation, The 6 East 39th Street Ninth Floor New York, NY 10016-0112	\$0	\$103,100	\$103,100	\$0	\$0	\$0	\$0	\$0
To work with CEOs for Cities to design and promote dialogue sessions in eight Talent Dividend cities to encourage integration of the Talent Dividend framework and concepts into local strategic planning efforts as a means of advancing the Talent Dividend/Lumina Big Goal								
6272 STD Teachers College of Columbia University 525 West 120th Street Box 127 New York, NY 10027	\$0	\$600,000	\$600,000	\$0	\$0	\$0	\$0	\$0
To increase the capacity of Hechinger Institute to produce and broker placement of high-quality, solutions-oriented news coverage of higher education for influential audiences and engaged citizens								
6707 STD Trustees of Indiana University, The P O Box 1847 Bloomington, IN 47402-1847	\$0	\$750,000	\$450,000	\$0	\$0	\$0	\$0	\$300,000
To allow the Indiana Business Research Center to apply powerful analytic modeling to help answer critical questions about factors influencing student success in higher education and the workforce in Indiana								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6623 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
W M Corporation 5471 Wisconsin Avenue Suite 300 Chevy Chase, MD 20815								
To upgrade The Washington Monthly's Web server to accommodate greater than anticipated readership of the Annual College Guide and home page.								
<b>Total for Productivity Budget</b>	\$0	\$13,185,700	\$9,768,900	\$0	\$0	\$0	\$0	\$3,416,800
Success Budget								
6323 STD	\$0	\$2,947,400	\$2,947,400	\$0	\$0	\$0	\$0	\$0
MDC, Inc P O Box 17268 400 Silver Cedar Court, Suite 300 Chapel Hill, NC 27516-7268								
To support the transition of the Achieving the Dream initiative to a sustainable enterprise.								
6526 STD	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
MDC, Inc P O Box 17268 400 Silver Cedar Court, Suite 300 Chapel Hill, NC 27516-7268								
To magnify the impact of the Developmental Education Initiative through communications activities								
6667 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
MDC, Inc P O Box 17268 400 Silver Cedar Court, Suite 300 Chapel Hill, NC 27516-7268								
To cover the costs of a reception at the Grantmakers for Education Conference in Chicago on October 6, 2009								
5698 STD	\$0	\$4,000,500	\$2,000,250	\$0	\$0	\$0	\$0	\$2,000,250
MDRC 16 East 34th Street, Floor 19 New York, NY 10016-4326								
To evaluate the implementation and effectiveness of Achieving the Dream: Community Colleges Count								

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Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget 6525 STD MDRC 16 East 34th Street, Floor 19 New York, NY 10016-4326	\$0	\$1,200,000	\$800,000	\$0	\$0	\$0	\$0	\$400,000
To evaluate the implementation of the Achieving the Dream Developmental Education Initiative								
6392 STD American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036	\$0	\$500,000	\$500,000	\$0	\$0	\$0	\$0	\$0
To develop and test a national framework for community colleges to improve student outcomes								
5922 STD Association of Public and Land-grant Universities 1307 New York Avenue, Northwest, Suite 400 Washington, DC 20005-4722	\$0	\$408,700	\$245,000	\$0	\$0	\$0	\$0	\$163,700
To assist higher education institutions to implement the student learning outcomes section of the Voluntary System of Accountability								
6359 STD Board of Trustees of the University of Illinois, The c/o Office of Sponsored Programs and Research Administration 1901 South First Street, Suite A Champaign, IL 61820-7406	\$0	\$140,000	\$140,000	\$0	\$0	\$0	\$0	\$0
To examine applied baccalaureate degree programs in the U S to assess their effectiveness in increasing the number of adult learners with the baccalaureate degree								



**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6697 STD United Way of Central Indiana, Inc P O Box 88409 3901 North Meridian Street Indianapolis, IN 46208-0409	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
<p>To provide funding to sponsor a Connected by 25 team to attend the 2009 Creating a Blueprint Conference and other professional development opportunities designed to address the needs and challenges of administrators, educators, policymakers, social workers and providers who support foster youth in achieving their educational goals.</p>								
6622 STD Council for Adult and Experiential Learning 55 East Monroe Suite 1930 Chicago, IL 60603	\$0	\$175,000	\$175,000	\$0	\$0	\$0	\$0	\$0
<p>To design an accessible "virtual" Prior Learning Assessment Center, to be developed and administered by CAEL</p>								
6295 STD Education Writers Association 2122 P Street NW Suite 201 Washington, DC 20037	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
<p>To support a panel discussion regarding degree quality with reporters at the Education Writers Association's annual meeting in Washington, D C , on April 30, 2009</p>								
6594 STD Excelencia in Education, Inc 1752 N Street Northwest 6th Floor Washington, DC 20036	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
<p>To support 2009 Examples of Excelencia and its Celebration de Excelencia</p>								

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Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6006 STD Georgetown University 37th & O Streets, Northwest Box 571168 Washington, DC 20057	\$0	\$2,577,700	\$1,546,630	\$0	\$0	\$0	\$0	\$1,031,070
To conduct and disseminate research on the relationship between higher education and the economy, including projecting the supply and demand for college-educated workers								
6253 STD Indiana Community Action Association, Inc 1845 West 18th Street Indianapolis, IN 46202	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To provide a comprehensive report about the financial aid system in Indiana and policy recommendations to increase access to these financial aid programs for working adult students								
6597 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036	\$0	\$1,110,600	\$600,000	\$0	\$0	\$0	\$0	\$510,600
To strengthen access and success through research, policy and improved practice								
6267 STD Ivy Tech Foundation 50 West Fall Creek Parkway, North Drive Indianapolis, IN 46208-5752	\$0	\$2,340,000	\$1,800,000	\$0	\$0	\$0	\$0	\$540,000
To increase attainment rates of at-risk youth through an Accelerated Associate Degree Program								
6532 STD Martin University, Inc 2171 Avondale Place P O Box 18567 Indianapolis, IN 46218	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To increase educational access and opportunity for incoming first and second year, disadvantaged, and underrepresented students by designing and implementing a Center for Student Success								

**Annual Report Financial Information - 2009**

**Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6368 STD Miller Center Foundation, The P.O. Box 400406 2201 Old Ivy Road Charlottesville, VA 22904-4406	\$0	\$750,000	\$750,000	\$0	\$0	\$0	\$0	\$0
To conduct and disseminate two national debates and supplemental outreach activities to increase public interest and energize public policymakers to address issues of importance to higher education								
6465 STD American Indian Higher Education Consortium 121 Oronoco Street Alexandria, VA 22314	\$0	\$500,000	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To assist Tribal Colleges and Universities to become more effectively engaged in higher education policy at the local, state and national level								
6408 STD Florida International University Office of Sponsored Research Administration 11200 Southwest 8th Street (MARC 430) Miami, FL 33199	\$0	\$495,800	\$300,000	\$0	\$0	\$0	\$0	\$195,800
To evaluate student success initiatives and develop program improvements to raise undergraduate persistence rates using a data-driven inquiry process								
6457 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036	\$0	\$604,600	\$304,600	\$0	\$0	\$0	\$0	\$300,000
To provide support to the MSI-Models of Success Program								
6461 STD Jackson State College Development Foundation, Inc P.O. Box 17144 Jackson, MS 39217	\$0	\$487,000	\$300,000	\$0	\$0	\$0	\$0	\$187,000
To create a multi-state, peer-learning network to ensure postsecondary success for minority students								

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Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6412 STD Salish Kootenai College, Inc Box 70 Pablo, MT 59855	\$0	\$402,200	\$203,400	\$0	\$0	\$0	\$0	\$198,800
To identify factors that improve the postsecondary retention and success of American Indian students enrolled in developmental studies courses								
6378 STD Southern Education Foundation, Inc. 135 Auburn Avenue, NE Second Floor Atlanta, GA 30303	\$0	\$500,000	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To enhance student learning outcomes assessment, documentation and use at Historically Black Colleges and Universities and Hispanic Serving Institutions								
6400 STD University Corporation at Monterey Bay 100 Campus Center Seaside, CA 93955-8001	\$0	\$500,000	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To improve the effectiveness of developmental education courses at three Hispanic-serving institutions								
6417 STD University of North Carolina - General Administration P O Box 2688 910 Raleigh Road Chapel Hill, NC 27515-2688	\$0	\$500,000	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To increase the retention and graduation rates for students of color at all six minority-serving institutions within the University of North Carolina system								
6462 STD University of Texas at El Paso 500 West University Avenue El Paso, TX 79968	\$0	\$500,000	\$300,000	\$0	\$0	\$0	\$0	\$200,000
To identify the institutional structures at minority-serving institutions that foster student success and increase the effectiveness of transfer programs across the state								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6480 STD National Consortium for College Completion 1250 H Street NW Suite 700 Washington, DC 20005	\$0	\$1,000,000	\$800,000	\$0	\$0	\$0	\$0	\$200,000
To support the creation and mission of the National Consortium on College Completion								
6152 STD National Institute for Native Leadership in Higher Education MSCO2 1580 Hokona Hall, Room 320 One University of New Mexico Albuquerque, NM 87131-0001	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To provide sponsorship for the 16th Annual National Institute for NINLHE								
6102 STD New England Board of Higher Education 45 Temple Place Boston, MA 02111-1305	\$0	\$65,000	\$65,000	\$0	\$0	\$0	\$0	\$0
To assist policymakers in the New England states to develop strategies to increase postsecondary attainment								
6285 STD Portland State University Foundation P O Box 751 Portland, OR 97207	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To support community partner attendance of the Partnership Institute, which seeks to enhance understanding of higher education-community partnerships through research dissemination and shared learning								
6531 STD Scholarship America 1550 American Boulevard East Suite 155 Minneapolis, MN 55425-1197	\$0	\$600,000	\$500,000	\$0	\$0	\$0	\$0	\$100,000
To build the capacity of Scholarship America to operate the Dreamkeepers program								

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
5824 STD Social Science Research Council, The One Pierrepont Plaza Brooklyn, NY 11201	\$0	\$407,100	\$307,100	\$0	\$0	\$0	\$0	\$100,000
To examine the factors that influence the Collegiate Learning Assessment measures of cognitive growth and post-graduation outcomes of disadvantaged students								
6624 STD Trustees of the University of Pennsylvania Office of Research Services 3451 Walnut Street Room P-221 Philadelphia, PA 19104	\$0	\$40,000	\$40,000	\$0	\$0	\$0	\$0	\$0
To provide operating support for Change magazine								
6094 STD Indiana Commission for Higher Education 101 West Ohio Street, Suite 550 Indianapolis, IN 46204-4254	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
To test the applicability of the Tuning Process at higher education institutions within the United States								
6142 STD Minnesota Office of Higher Education 1450 Energy Park Drive Suite 350 St Paul, MN 55108	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
To test the applicability of the Tuning Process at higher education institutions within the United States								
6140 STD Utah Board of Regents Board of Regents Building The Gateway 60 South 400 West Salt Lake City, UT 84101-1284	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$0
To test the applicability of the Tuning Process at higher education institutions within the United States								

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**Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6556 STD United States Department of Education 400 Maryland Avenue, Southwest Room 5E316 Washington, DC 20202	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the activities and conference costs of the 2009 National HBCU Conference, held on August 30, 2009, through September 3, 2009								
6174 STD University of Arizona University Services Building, 414 P O Box 210158 Tucson, AZ 85721-0158	\$0	\$280,250	\$280,250	\$0	\$0	\$0	\$0	\$0
To support participation of higher education institutions in southern Arizona in an OECD-organized initiative.								
6562 STD University of Texas System, The 702 Colorado Suite 4 100 Austin, TX 78701	\$0	\$500,000	\$200,000	\$0	\$0	\$0	\$0	\$300,000
To implement a statewide Bachelor's Accelerated Completion Program (BAC) to meet the needs of Texans who have started college but never finished								
6143 STD Women In Government, Ltd 1319 F Street, Northwest Suite 710 Washington, DC 20004-1153	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
To promote adult learning through state policy work among state legislators								
Total for Success Budget	\$0	\$24,642,350	\$17,415,130	\$0	\$0	\$0	\$0	\$7,227,220
Total for Standard Grants	\$19,560,270	\$56,302,425	\$48,550,425	\$550,000	\$0	\$0	\$0	\$26,762,270

**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Attainment/Retention</b> 6001 STD CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036  To assist 11 states participating in the Making Opportunity Affordable initiative in building the case for addressing the urgent need to graduate millions more U S college students within existing financial resources	\$487,000	\$0	\$487,000	\$0	\$0	\$0	\$0	\$0
5728 STD HCM Strategists, LLC 429 3rd Street, Northeast Washington, DC 20002  To provide state policy development and knowledge management for the Making Opportunity Affordable initiative	\$1,413,400	\$0	\$999,400	\$0	\$0	\$0	\$0	\$414,000
<b>Total for Attainment/Retention</b>								
	\$1,900,400	\$0	\$1,486,400	\$0	\$0	\$0	\$0	\$414,000
<b>Productivity Budget</b> 6459 STD CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036  To produce storytelling videos to help states make the case among key stakeholders for improving higher education productivity	\$0	\$99,500	\$99,500	\$0	\$0	\$0	\$0	\$0
6673 STD CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036  To develop and implement communication and media strategies across states that advance productivity improvements within U S higher education	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
<b>Total for Productivity Budget</b>								
	\$0	\$399,500	\$399,500	\$0	\$0	\$0	\$0	\$0



**Annual Report Financial Information - 2009  
Grants**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6187 STD Catalytica, Inc 200 Roy Street, Suite 101 Seattle, WA 98109	\$0	\$116,000	\$116,000	\$0	\$0	\$0	\$0	\$0
To explain and communicate to the field the lessons arising from a three-state exploration of Tuning at U S higher education institutions.								
6599 STD Catalytica, Inc 200 Roy Street, Suite 101 Seattle, WA 98109	\$0	\$9,888	\$9,888	\$0	\$0	\$0	\$0	\$0
To supplement the original grant to reflect higher-than-anticipated projected costs related to traveling, hiring a project coordinator, conducting additional interviews and producing video segments that were not anticipated when the original grant was made								
<b>Total for Success Budget</b>	<b>\$0</b>	<b>\$125,888</b>	<b>\$125,888</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Total for Expenditure Responsibility Grants</b>	<b>\$1,900,400</b>	<b>\$525,388</b>	<b>\$2,011,788</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$414,000</b>
<b>Grand Total</b>	<b>\$21,460,670</b>	<b>\$56,827,813</b>	<b>\$50,562,213</b>	<b>\$550,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$27,176,270</b>

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Directors' Designation</b>								
1001472 STD Action Center for Educational Services and Scholarship Foundation 31 St James Avenue, Suite 520 Boston, MA 02116	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001262 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
To provide support for the college fund								
1001388 STD Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001476 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To support the Ball State Bold Campaign								
1001389 STD Child Crisis Center East Valley, Inc PO Box 4114 Mesa, AZ 85211	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To provide support for general operations without restriction								
1001349 STD Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Directors' Designation</b>								
1001269 STD Drexel University Office of Institutional Advancement 3141 Chestnut Street, Suite 310 Philadelphia, PA 19104	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
<b>To support student retention and success</b>								
1001427 STD Excelencia in Education, Inc 1752 N Street Northwest 6th Floor Washington, DC 20036	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support without restriction</b>								
1001399 STD Fresh Start Women's Foundation 1130 East McDowell Phoenix, AZ 85006	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support without restriction.</b>								
1001351 STD Heartland Truly Moving Pictures, Inc Heartland Film Festival 200 S Meridian St., Suite 220 Indianapolis, IN 46225-1076	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001263 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
<b>To provide support for the scholarship fund</b>								
1001429 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support without restriction</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Directors' Designation</b>								
1001430 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
To support the Sara Martinez Tucker Endowment								
1001431 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
To support the Jose Canchola Scholarship								
1001428 STD Hispanics in Philanthropy 200 Pine Street, Suite 700 San Francisco, CA 94105	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the Hispanics in Philanthropy General Fund								
1001353 STD Hutson School 5815 E 38th Street Indianapolis, IN 46218	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001390 STD Illinois Institute of Technology Suite 310 565 West Adams Street Chicago, IL 60661	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To support the PLUS Summer Program for underrepresented youth								
1001352 STD International School of Indiana, Inc 4330 North Michigan Road Indianapolis, IN 46208	\$0	\$4,000	\$4,000	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Directors' Designation								
1001264 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
LeMoyné-Owen College 807 Walker Avenue Memphis, TN 38126								
To provide support to the general scholarship fund								
1001488 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Leukemia & Lymphoma Society, The 1311 Mamaroneck Avenue White Plains, NY 10605								
To provide unrestricted patient services through the South Florida Chapter of the Leukemia & Lymphoma Society.								
1001355 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Northwestern University 2020 Ridge Avenue, Suite 230 Gift/Record Services Evanston, IL 60208-4305								
To support the Medill School of Journalism								
1001272 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Pennsylvania State University 250 Chambers University Park, PA 16802								
To support the Scholarship Fund for the College of Education								
1001348 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Permanent Endowment Fund for Martha's Vineyard P O Box 1182 Oak Bluffs, MA 02557								
To support scholarships for low income students. Please refer to the attached memo from Mr Darrell								
1001406 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Providence Cristo Rey High School 75 N Bellview Place Indianapolis, IN 46222								
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Directors' Designation</b>								
1001273 STD St. Joseph's College of Maine 278 White's Bridge Road Standish, ME 04084	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the Class of 1967 Memorial Scholarship Fund								
1001508 STD United Synagogue of Conservative Judaism 820 Second Avenue New York, NY 10017-4504	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To initiate a strategic planning study								
1001509 STD University of California Irvine Foundation 4199 Campus Drive, Suite 400 Irvine, CA 92697-5601	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the Olive Tree Initiative								
1001270 STD University of New Hampshire Foundation, Inc Elliott Alumni Center 9 Edgewood Road Durham, NH 03824	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To support the J. Bonnie Newman Scholarship Fund								
1001354 STD Wellness Community Central Indiana, The 5150 West 71st Street Indianapolis, IN 46268	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
<b>Total for Directors' Designation</b>		<b>\$0</b>	<b>\$195,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Length of Service Gift</b>								
1001266 STD Center Grove Middle School North 202 North Morgantown Road Greenwood, IN 46142	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support the school's Pet Patrol Club								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Length of Service Gift								
1001284 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001144 STD National Childhood Cancer Foundation P O Box 30375 Bethesda, MD 20824	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support childhood cancer research in memory of Coleman Larson Please send this tribute to Team Larson, P.O. Box 251, Callender, Iowa, 50523.								
1001216 STD St Vincent Hospital Foundation 8240 Naab Road, Suite 160 Indianapolis, IN 46260	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support the fundraising efforts of Granny's Girls and Boys Team (#530135-3) for the Weekend to End Breast Cancer event.								
1001143 STD Wellness Community Central Indiana, The 5150 West 71st Street Indianapolis, IN 46268	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support any need without restriction								
Total for Length of Service Gift		\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Matching Gift								
1001420 STD 100 Black Men of Indianapolis 3901 North Meridian Street, Suite 10 Indianapolis, IN 46208	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general operating support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001235 STD Alice's, Inc P O Box 124 Valparaiso, IN 46384	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001405 STD Alice's, Inc P O Box 124 Valparaiso, IN 46384	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001381 STD Alzheimer's Disease and Related Disorders Association 3701 Pender Drive, Suite 400 Fairfax, VA 22030	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the fundraising efforts of team "Blondes vs Brunettes"								
1001048 STD Ambassadors for Children 1201 N Central Avenue Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide services for children in need								
1001241 STD American Cancer Society 1615 West Chester Pike, Suite 102 West Chester, PA 19382	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the Relay for Life of Rose Tree Media and Madeline Malone's participation								
1001268 STD American Cancer Society 1801 Meyers Road Oakbrook Terrace, IL 60181	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To support the Abigail Kaymen's participation in Race for the Cure, Elmhurst, Illinois, as part of the Sugarush Team in honor of family members who are cancer survivors								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001157 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001173 STD American Cancer Society Putnam County 705 Putnam Street Terre Haute, IN 47802	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support the participation of Team Beta Theta Pi from DePauw University in the 2009 Relay for Life Campaign								
1001366 STD American College Personnel Association Educational Leadership Foundation 312 West Commercial Street P O Box 227 East Rochester, NY 14445	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support unrestricted activity in research, grants, or professional development								
1001245 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide support for Robbie Morales's participation in the Hoops for Heart event at the Pittsboro Elementary School on April 16, 2009, at Pittsboro, Indiana								
1001419 STD American Heart Association 5375 Southwest 7th Street Topeka, KS 66606	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general program support								
1001207 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support student scholarships								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001247 STD American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the Ausin Family Scholarship endowment								
1001557 STD American Lung Association of the Southwest 5600 Greenwood Plaza, Suite 100 Greenwood Village, CO 80111	\$0	\$300	\$0	\$0	\$0	\$0	\$0	\$300
To provide support without restriction.								
1001442 STD American National Red Cross P O Box 37295 Washington, DC 20013	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the International Response Fund								
1001465 STD American National Red Cross P O Box 37295 Washington, DC 20013	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the International Response Fund								
1001290 STD American University in Bulgaria, The 910 17th Street, Northwest Suite 1100 Washington, DC 20006	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
To support the Metcalf/Ramsden endowed scholarship								
1001280 STD Amyotrophic Lateral Sclerosis Association P O Box 54492 2375 Fortune Drive Lexington, KY 40555-4492	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide support for ALS research for a cure and to support victims								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001180 STD Animal Protection Coalition, Inc 10474 West 800 South Owensville, IN 47665	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To support the Indiana Horse Rescue program								
1001459 STD Anti-Defamation League of Bnai Brith 309 West Washington, Suite 750 Chicago, IL 60606	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support for the non-profit activities of the Anti-Defamation League								
1001495 STD Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001166 STD Asian American Alliance, Inc 1000 East 116th Street Carmel, IN 46032	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001425 STD Autism Speaks, Inc. 5455 Wilshire Boulevard, Suite 2250 Los Angeles, CA 90036	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support autism research								
1001477 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To support the Miller College of Business Dean's Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001478 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
<b>To support the Teachers College Dean's Fund</b>								
1001502 STD Banner Health Foundation 2025 N 3rd Street, Suite 250 Phoenix, AZ 85004	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
<b>To support the Children's Hospital</b>								
1001293 STD Bergen Catholic High School 1040 Oradell Avenue Oradell, NJ 07649	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
<b>To support the Annual Fund</b>								
1001030 STD Bethel African Methodist Episcopal Church 302 North Rogers Street Bloomington, IN 47404	\$15,000	\$0	\$15,000	\$0	\$0	\$0	\$0	\$0
<b>To help persons in need attend the 2009 Presidential Inauguration bus trip</b>								
1001474 STD Big Brothers Big Sisters of Central Indiana, Inc 2960 N Meridian Street Suite 150 Indianapolis, IN 46208-4715	\$0	\$1,050	\$1,050	\$0	\$0	\$0	\$0	\$0
<b>To provide general program support.</b>								
1001185 STD Big Brothers Big Sisters of Dubois County, Inc. P O Box 86 Jasper, IN 47547-0086	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
<b>To help Big Brothers Big Sisters make a positive difference in children's lives by finding mentors for them</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001141 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001463 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the General Fund								
1001178 STD Brebeuf Jesuit Preparatory 2801 W 86th Street Indianapolis, IN 46268-1925	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Capital Campaign and the Kite Wellness Center								
1001365 STD Brown County Foundation, Inc P O Box 191 96 South Jefferson Street Nashville, IN 47448	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001237 STD Brown University in Providence in The State of Rhode Island Box 1877 Providence, RI 02912	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001109 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support for the Jordan Academy of Dance								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001376 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208	\$0	\$1,648	\$1,648	\$0	\$0	\$0	\$0	\$0
For \$824 00 to be used for general support of Butler University The remaining \$824 00 is designated in support of the Jordan Academy of Dance								
1001385 STD Butler University 4600 Sunset Avenue Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support athletic scholarships								
1001039 STD Campus Crusade for Christ, Inc 100 Lake Hart Drive Orlando, FL 32832	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general operating support for Indiana programs.								
1001265 STD Carmel Clay Public Library Foundation 55 4th Avenue Southeast Carmel, IN 46032	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001224 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the CUMMS Kids Endowment in memory of Kay Long								
1001325 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250	\$0	\$1,230	\$1,230	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001411 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
To support the Fall festival fund								
1001511 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support the end-of-year annual campaign								
1001093 STD Cathedral High School 5225 E 56th Street Indianapolis, IN 46226	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide support for scholarship programs								
1001506 STD Cathedral High School 5225 E 56th Street Indianapolis, IN 46226	\$0	\$8,100	\$8,100	\$0	\$0	\$0	\$0	\$0
To provide tuition for needy students								
1001176 STD Catholic Charities Indianapolis 1400 N Meridian Street Indianapolis, IN 46202	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001124 STD Catholic Relief Services P.O Box 17090 Baltimore, MD 21298	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support								

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Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001451 STD CATO Institute 1000 Massachusetts Avenue Washington, DC 20001	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001214 STD Center for Leadership Development 2425 Dr. Martin Luther King Jr. Street Indianapolis, MN 46208-5546	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the Center for Leadership Development Building Project								
1001159 STD Center for Positive Living 330 South Pineapple Avenue Suite 210 Sarasota, FL 34236	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001204 STD Center Grove Education Foundation 4800 West Stones Crossing Road Greenwood, IN 46143	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the Spradlin Family Scholarship Fund								
1001112 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support services to women and girls								
1001142 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the Women's Fund and services to women and girls								



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Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001255 STD Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To support the Latino Scholarship Fund</b>								
1001410 STD Central Indiana Community Foundation 615 N Alabama Street Room 119 Indianapolis, IN 46204-1498	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
<b>To provide general support without restriction.</b>								
1001384 STD Charles A. Tindley Accelerated School 3960 Meadows Drive Indianapolis, IN 46205	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001486 STD Child Crisis Center East Valley, Inc PO Box 4114 Mesa, AZ 85211	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001391 STD Children's Museum of Indianapolis, Inc 3000 N Meridian Indianapolis, IN 46208	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001086 STD Christ United Methodist Church 8540 US 31 South Indianapolis, IN 46227	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
<b>To provide support for the food pantry</b>								

**Annual Report Financial Information - 2009  
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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001135 STD Christ United Methodist Church 8540 US 31 South Indianapolis, IN 46227	\$0	\$1,434	\$1,434	\$0	\$0	\$0	\$0	\$0
To provide general operating support No part of this gift shall be used for pastor salaries or personal benefits.								
1001171 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$1,530	\$1,530	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001219 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1001444 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001467 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001335 STD Christel House, Inc Suite 1990 10 West Market Street Indianapolis, IN 46204-2973	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support education for low-income students.								

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Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001434 STD Christel House, Inc Suite 1990 10 West Market Street Indianapolis, IN 46204-2973	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support children who are a part of the Christel House movement								
1001517 STD Christel House, Inc Suite 1990 10 West Market Street Indianapolis, IN 46204-2973	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support education programs.								
1001409 STD Christian Activity Center, Inc P O Box 2525 540 North 6th Street East St Louis, MO 62201	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general operating support in memory of Ray Brandes.								
1001356 STD Christian Foundation for Children and Aging One Elmwood Avenue Kansas City, KS 66103	\$0	\$1,080	\$1,080	\$0	\$0	\$0	\$0	\$0
To support the project in Santa Catarina, Mexico								
1001286 STD Christian Worldwide Adoption Foundation 777 South Allen Road Flat Rock, NC 28731	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the adoption program								
1001085 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general operating support and for Financial Freedom course materials for the congregation								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001177 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001211 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001289 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001308 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support where most needed								
1001412 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001439 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001470 STD Clayton Christian Church 5110 South State Road 39 Clayton, IN 46118	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support or for where most needed								
1001104 STD Coalition for Homelessness Intervention and Prevention of Greater Indianapolis 3737 North Meridian, Suite 401 Indianapolis, IN 46208	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To provide general operating support in memory of Joe Fahy								
1001038 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001061 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001167 STD Coburn Place Safehaven II, Inc. 604 East 38th Street Indianapolis, IN 46205	\$0	\$105	\$105	\$0	\$0	\$0	\$0	\$0
To purchase needed items for the families serviced at Coburn Place								
1001342 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the most urgent needs								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001402 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support the general fund								
1001525 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001539 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$825	\$825	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001433 STD College Mentors for Kids, Inc 212 West 10th Street, Suite B260 Indianapolis, IN 46202	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support the mentor program for low-income children.								
1001253 STD Colorado Humanities Suite 101 1490 Lafayette Street Denver, CO 80218	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001369 STD Columbus Regional Shelter for Victims of Domestic Violence P O Box 103 Columbus, IN 47202	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support general needs in honor of Dan DeLapp								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001115 STD Community Church at Murphy's Landing 7401 South Harding Indianapolis, IN 46217	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001542 STD Community Foundation 1123 Spruce Street Boulder, CO 80302	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1001512 STD Community Foundation of Morgan County 250 North Monroe Street Mooreville, IN 46158	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support the 2009 One Road Christmas Fund								
1001496 STD Compassion 4 Kids, Inc 11938 Glen Cove Drive Indianapolis, IN 46236	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide direct support to needy families								
1001058 STD Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921	\$0	\$360	\$360	\$0	\$0	\$0	\$0	\$0
To provide support where most needed								
1001188 STD Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921	\$0	\$480	\$480	\$0	\$0	\$0	\$0	\$0
To provide support where needed								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001307 STD	\$0	\$360	\$360	\$0	\$0	\$0	\$0	\$0
Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support where most needed								
1001380 STD	\$0	\$414	\$414	\$0	\$0	\$0	\$0	\$0
Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support where needed								
1001440 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support where most needed								
1001490 STD	\$0	\$768	\$768	\$0	\$0	\$0	\$0	\$0
Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support for children and families in need (Jose A Huayecho C PE-386-0139)								
1001618 STD	\$0	\$414	\$0	\$0	\$0	\$0	\$0	\$414
Compassion International 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support where most needed								
1001031 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Conner Prairie Inc 13400 Allisonville Road Fishers, IN 46038								
To provide general support								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001547 STD Conner Prairie Museum, Inc 13400 Allisonville Road Fishers, IN 46038	\$0	\$7,500	\$0	\$0	\$0	\$0	\$0	\$7,500
To provide general operating support.								
1001559 STD Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038	\$0	\$300	\$0	\$0	\$0	\$0	\$0	\$300
To provide general support								
1001118 STD Covenant House Florida, Inc. 733 Breakers Avenue Fort Lauderdale, FL 33304	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001540 STD Covenant House Florida, Inc. 733 Breakers Avenue Fort Lauderdale, FL 33304	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1001242 STD Damien Center, Inc. 26 North Arsenal Avenue Indianapolis, IN 46201	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001239 STD Dartmouth Hitchcock Medical Center One Medical Center Drive Lebanon, NH 03756	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001071 STD DePauw University 300 East Seminary Street P O Box 37 Greencastle, IN 46135-0037	\$0	\$3,765	\$3,765	\$0	\$0	\$0	\$0	\$0
To provide support for education								
1001203 STD DePauw University 300 East Seminary Street P O Box 37 Greencastle, IN 46135-0037	\$0	\$10,500	\$10,500	\$0	\$0	\$0	\$0	\$0
To support the Parents' Fund for scholarships to needy students								
1001221 STD DePauw University 300 East Seminary Street P O Box 37 Greencastle, IN 46135-0037	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001450 STD DePauw University 300 East Seminary Street P O. Box 37 Greencastle, IN 46135-0037	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund Drive								
1001519 STD DePauw University 300 East Seminary Street P O Box 37 Greencastle, IN 46135-0037	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001536 STD DePauw University 300 East Seminary Street P O Box 37 Greencastle, IN 46135-0037	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To support higher education								
1001164 STD Diocese of Venice in Florida 19680 Cypress View Drive Fort Meyers, FL 33967	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general operating support for the parish.								
1001202 STD Diocese of Venice in Florida P O Box 1958 Venice, FL 34285	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
For the Catholic Faith Appeal in support of Our Lady of Light Parish								
1001616 STD Diocese of Venice in Florida P O Box 2116 Venice, FL 32484	\$0	\$1,500	\$0	\$0	\$0	\$0	\$0	\$1,500
To support the 2009 Christmas Appeal								
1001617 STD Diocese of Venice in Florida P O Box 2116 Venice, FL 32484	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$3,000
To support the general fund								
1001052 STD Dominican Literacy Center, Aurora 260 Vermont Avenue Aurora, IL 60505	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide tutoring for low-income and immigrant women and for citizenship classes								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001095 STD Dominican Republic Education & Mentoring Project Inc (DREAM) P O Box 4136 Ithaca, NY 14852	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support education programs								
1001220 STD Dress for Success Indianapolis Inc 850 North Meridian Street Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the fundraising drive for Send One Suit/Dress for Success								
1001254 STD Drexel University Office of Institutional Advancement 3141 Chestnut Street, Suite 310 Philadelphia, PA 19104	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To provide support for the Constantine Papadakis Fund								
1001337 STD Drexel University Office of Institutional Advancement 3141 Chestnut Street, Suite 310 Philadelphia, PA 19104	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
To support scholarships for student success								
1001199 STD Duke University P O Box 90581 Durham, NC 27708-0581	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support Trinity College								
1001168 STD Duquesne University of the Holy Spirit 305E Administration Building Pittsburgh, PA 15282-0231	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support the Thomas V Fritz Memorial Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001550 STD Dyslexia Institute of Indiana, Inc 2511 East 46th Street, Suite 0-2 Indianapolis, IN 46205	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001036 STD East 91st Street Christian Church 6049 E 91st Street Indianapolis, IN 46250-1398	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
<b>To support the World Hunger Program</b>								
1001146 STD Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218	\$0	\$35,682	\$35,682	\$0	\$0	\$0	\$0	\$0
<b>50% for general operating support and the remaining 50% to support the Land &amp; Building Fund</b>								
1001041 STD Educational Choice Charitable Trust Suite 1250 One N Capitol Avenue Indianapolis, IN 46204	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001489 STD Educational Choice Charitable Trust Suite 1250 One N Capitol Avenue Indianapolis, IN 46204	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support without restriction.</b>								
1001089 STD Eiteljorg Museum of American Indians & Western Art White River State Park 500 W Washington Street Indianapolis, IN 46204-2707	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To support Native American art</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001228 STD Estes Park Medical Center Foundation P O Box 3650 Estes Park, CO 80517	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001346 STD Family Services Association of Central Indiana, Inc 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001097 STD Fathers and Families Resource/Research Center, Inc 2835 N Illinois Street Indianapolis, IN 46208	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001518 STD Fathers and Families Resource/Research Center, Inc 2835 N Illinois Street Indianapolis, IN 46208	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support social services								
1001047 STD Fine Arts Society of Indianapolis, Inc PO Box 1706 Indianapolis, IN 46206-1706	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the broadcast of classical music								
1001226 STD Fine Arts Society of Indianapolis, Inc PO Box 1706 Indianapolis, IN 46206-1706	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To support general operations								

**Annual Report Financial Information - 2009**  
**Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001558 STD Fine Arts Society of Indianapolis, Inc PO Box 1706 Indianapolis, IN 46206-1706	\$0	\$300	\$0	\$0	\$0	\$0	\$0	\$300
To support public broadcast of classical music								
1001170 STD First Meridian Heights Presbyterian Church 4701 North Central Avenue Indianapolis, IN 46205	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001371 STD First Meridian Heights Presbyterian Church 4701 North Central Avenue Indianapolis, IN 46205	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001421 STD First Meridian Heights Presbyterian Church 4701 North Central Avenue Indianapolis, IN 46205	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001302 STD Fistula Foundation, The 1171 Homestead Road, Suite 265 Santa Clara, CA 95050	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To help with the Panzi Hospital for women that are victims of sexual violence.								
1001497 STD Florida International University Foundation MARC 540 11200 Southwest 8th Street Miami, FL 33199	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support the College of Education Alumni Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001114 STD Florida Studio Theatre, Inc 1241 North Palm Avenue Sarasota, FL 34236	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001538 STD Forest Manor Multi-Service Center 5603 East 38th Street Indianapolis, IN 46218	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001152 STD Forgiveness and Grace Church 857 North State Road 135 Greenwood, IN 46142	\$0	\$2,100	\$2,100	\$0	\$0	\$0	\$0	\$0
To provide general operating support No part of this gift may be used for the pastor's salary or personal benefits								
1001191 STD Forgiveness and Grace Church 857 North State Road 135 Greenwood, IN 46142	\$0	\$2,625	\$0	\$0	\$2,625	\$0	\$0	\$0
To provide general operating support No part of this gift may be used for the pastor's salary or personal benefit								
1001044 STD Forgiveness Grace Church 857 North State Road 135 Greenwood, IN 46142	\$0	\$2,490	\$2,490	\$0	\$0	\$0	\$0	\$0
To provide general operating support No part of this gift may be used for the pastor's salary or personal benefits								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001084 STD Forgiveness Grace Church 857 North State Road 135 Greenwood, IN 46142	\$0	\$2,100	\$2,100	\$0	\$0	\$0	\$0	\$0
To provide general support No part of this gift may be used for the pastor's salary or personal benefits								
1001129 STD Fresh Start of Indiana, Inc 7129 East 46th Street Indianapolis, IN 46226	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001479 STD Fresh Start Women's Foundation 1130 East McDowell Phoenix, AZ 85006	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
To support general operations								
1001131 STD Friends of Belle-Riviere, Inc 7159 Crest Lane Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the construction of a Community Center in an impoverished Haitian community								
1001088 STD Friends of the World Food Program, Inc 1819 L Street, Northwest Suite 900 Washington, DC 20036-3833	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support efforts to alleviate world hunger								
1001056 STD From the Heart Rescue P O Box 659 Westfield, IN 46074	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general operating support for the organization								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001438 STD Garrett Evangelical Theological Seminary 2121 Sheridan Road Evanston, IL 60201	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the McGriff Scholarship Fund								
1001087 STD Gennesaret Free Clinic 631 E New York Street Indianapolis, IN 46202-3706	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support medical services								
1001103 STD Gennesaret Free Clinic 631 E New York Street Indianapolis, IN 46202-3706	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001105 STD Gilda's Club of South Florida, Inc 119 Rose Drive Fort Lauderdale, FL 33316	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1001484 STD Gilda's Club of South Florida, Inc 119 Rose Drive Fort Lauderdale, FL 33316	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001186 STD Girls Incorporated of Indianapolis, Inc 3959 N Central Avenue Indianapolis, IN 46205	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general operating support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001281 STD Girls Incorporated of Indianapolis, Inc. 3959 N Central Avenue Indianapolis, IN 46205	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001283 STD Girls Incorporated of Indianapolis, Inc 3959 N Central Avenue Indianapolis, IN 46205	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001319 STD Girls Incorporated of Indianapolis, Inc 3959 N Central Avenue Indianapolis, IN 46205	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001046 STD Goodwill Education Initiatives, Inc 1635 West Michigan Street Indianapolis, IN 46222	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide developmental services to the charter school								
1001065 STD Goodwill Education Initiatives, Inc 1635 West Michigan Street Indianapolis, IN 46222	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support for the school								
1001192 STD Goodwill Industries Foundation of Central Indiana 1635 West Michigan Street Indianapolis, IN 46222-3852	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide social services to those in need								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001516 STD Goodwill Industries of Central Indiana, Inc 1635 West Michigan Street Indianapolis, IN 46222-3852	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001543 STD Goodwill Industries of Central Indiana, Inc 1635 West Michigan Street Indianapolis, IN 46222-3852	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To support social services and job training.								
1001560 STD Greater Indianapolis Literacy League, Inc 2450 North Meridian Indianapolis, IN 46208	\$0	\$150	\$0	\$0	\$0	\$0	\$0	\$150
To support adult literacy								
1001055 STD Greater Indianapolis Telugu Association 8665 Providence Drive Fishers, IN 46038	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the education of blind children								
1001457 STD H. Lee Moffitt Cancer Center and Research Institute Foundation, Inc 12902 Magnolia Drive Tampa, FL 33612	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To support blood cancer research								
1001175 STD Habitat for Humanity of Lee County, Inc 1288 North Tomiami Trail North Fort Myers, FL 33903	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support housing for low-income families								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001037 STD Haiti Nursing Foundation P O Box 3008 Ann Arbor, MI 48106-3008	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the nursing school and scholarships as described in Mr Schmidt's letter of December 30, 2008								
1001357 STD Hanover College PO Box 108 Hanover, IN 47243	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001364 STD Hanover College PO Box 108 Hanover, IN 47243	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support scholarships for low-income students								
1001541 STD Harry Chapin Food Bank of Southwest Florida, Inc. 3760 Fowler Street Fort Meyers, FL 33901	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support the 2009 Christmas Appeal.								
1001032 STD Heartland Truly Moving Pictures, Inc Heartland Film Festival 200 S Meridian St, Suite 220 Indianapolis, IN 46225-1076	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support independent film making								
1001137 STD Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S Meridian St, Suite 220 Indianapolis, IN 46225-1076	\$0	\$2,490	\$2,490	\$0	\$0	\$0	\$0	\$0
To support independent film makers								

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Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001336 STD Heartland Truly Moving Pictures, Inc Heartland Film Festival 200 S Meridian St., Suite 220 Indianapolis, IN 46225-1076	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support film making that affirms the human spirit and good values								
1001060 STD Heifer Project International 1 World Avenue Little Rock, AR 72202	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support Heifer International's efforts to enable agricultural self-sufficiency among the world's poor								
1001359 STD Hendricks County Community Foundation 5055 East Main Street Suite A Avon, IN 46123	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support for the Givan Legacy Fund in memory of Robert Givan								
1001396 STD High Street United Methodist Church 219 South High Street Muncie, IN 47305	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
In honor of the memory of John Fisher								
1001271 STD Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105	\$0	\$45,000	\$45,000	\$0	\$0	\$0	\$0	\$0
To support the Hispanic Scholarship Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001082 STD Holy Cross Hospital, Inc 4725 North Federal Highway Fort Lauderdale, FL 33308	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To provide support solely for the work of Dr. Ena Segota								
1001501 STD Holy Cross Hospital, Inc 4725 North Federal Highway Fort Lauderdale, FL 33308	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To provide support solely for the work of Dr. Ena Segota with the Biennes Cancer Center and research on blood cancers								
1001361 STD Holy Cross Roman Catholic Church 110 East West Street Baltimore, MD 21230	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001172 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide operating support or for the Capital Campaign for the Rectory.								
1001294 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1001533 STD Holy Spirit at Geist Catholic Church 10350 Glaser Way Fishers, IN 46038	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009**  
**Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001223 STD Human Rights Watch 350 Fifth Avenue New York, NY 10118	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support the United States program								
1001154 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$1,230	\$1,230	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001229 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001288 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001408 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$4,800	\$4,800	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001483 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support animal care at the shelter								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001491 STD Humane Society of Broward County 2070 Griffin Road Ft Lauderdale, FL 33312	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001258 STD Humane Society of Indianapolis 7929 North Michigan Road Indianapolis, IN 46268	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001466 STD Humane Society of Indianapolis 7929 North Michigan Road Indianapolis, IN 46268	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the Humane Society of Indianapolis in its care for homeless and neglected animals								
1001059 STD Immaculate Heart of Mary 5692 Central Ave Indianapolis, IN 46220	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To support annual giving for charitable and religious purposes								
1001122 STD Immaculate Heart of Mary 5692 Central Ave Indianapolis, IN 46220	\$0	\$5,250	\$5,250	\$0	\$0	\$0	\$0	\$0
As part of annual giving to provide general support for the parish.								
1001057 STD Impact 100 Greater Indianapolis, Inc. P O Box 40531 Indianapolis, IN 46240	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support high impact philanthropy								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001169 STD Independent Colleges of Indiana, Inc 3135 North Meridian Street Indianapolis, IN 46208-4717	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support higher education								
1001069 STD Indiana Amateur Baseball Association 7160 Zionsville Road Indianapolis, IN 46268	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001513 STD Indiana Amateur Baseball Association 7160 Zionsville Road Indianapolis, IN 46268	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general program support								
1001062 STD Indiana Family Institute 155 East Market Street, Suite 307 Indianapolis, IN 46204	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support marriage and relationship counseling								
1001368 STD Indiana Humanities Council, Inc 1500 North Delaware Indianapolis, IN 46202	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the San Salvador Writers' Project.								
1001121 STD Indiana Network for Higher Education Ministries 1100 West 42nd Street, Suite 200 Indianapolis, IN 46208	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001091 STD Indiana Repertory Theatre, Inc. 140 W Washington Street Indianapolis, IN 46204	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001282 STD Indiana Repertory Theatre, Inc 140 W Washington Street Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support theater arts								
1001555 STD Indiana Repertory Theatre, Inc 140 W Washington Street Indianapolis, IN 46204	\$0	\$600	\$0	\$0	\$0	\$0	\$0	\$600
To provide general support								
1001225 STD Indiana Sports Corporation Suite 1200 201 South Capitol Avenue Indianapolis, IN 46225	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
To support Dianna Boyce's team participation in the Big Ten Hoops Day 5K for charity								
1001259 STD Indiana State University Foundation, Inc 217 N 6th Gillum Hall 320 Terre Haute, IN 47809	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the John P. Newton Scholarship Fund								
1001291 STD Indiana State University Foundation, Inc 217 N 6th Gillum Hall 320 Terre Haute, IN 47809	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To use \$1,500 to support the College of Education The remaining \$3,000 is to support the Danny Tanoos Classroom Leadership Campaign								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001127 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001181 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001298 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$5,100	\$5,100	\$0	\$0	\$0	\$0	\$0
To support the Indiana Symphony Orchestra's music and outreach								
1001372 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$2,013	\$2,013	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001397 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$705	\$705	\$0	\$0	\$0	\$0	\$0
To support musical performances								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001564 STD Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919	\$0	\$2,100	\$0	\$0	\$0	\$0	\$0	\$2,100
To provide general support for the J. Bell event held at the home of Crystal DeHaam.								
1001485 STD Indiana United Methodist Children's Home, Inc 515 West Camp Street P.O. Box 747 Lebanon, IN 46052	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide direct care for residents in memory of Louise Campbell and Larry DeLapp								
1001054 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the Indiana University School of Law								
1001073 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support legal education								
1001074 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To provide general support to the Indiana University School of Law at the Indianapolis campus								
1001075 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support to the John Herron Society								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001148 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the Krannert Institute of Cardiology Fund at the IU School of Medicine in memory of Mr. Harry Spires								
1001174 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001201 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Life Sciences Pre-Seed Fund								
1001206 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To support the Kelly School of Business, Indianapolis, evening MBA program.								
1001267 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support higher education and music instruction for students less able to pay for lessons								
1001317 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support the History Department General Fund (\$750 00) and the Arts & Sciences Annual Giving (\$450 00)								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001338 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the Dean Richard N Mckaig Leadership Fund.								
1001447 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the annual fundraising drive for the Kelly School of Business								
1001448 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support need-based scholarships for Kelly School of Business students								
1001449 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To provide \$750 for general support for the IU School of Health and Rehabilitation Sciences. The remaining \$1,500 is to provide general support for the IU School of Journalism								
1001453 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$26,250	\$26,250	\$0	\$0	\$0	\$0	\$0
To support scholarships and other purposes as specified on the attached list								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001498 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$1,050	\$1,050	\$0	\$0	\$0	\$0	\$0
To support Arts & Sciences Annual Giving (I32AS00043) with \$300 00 and the History Department General Fund (I32AS19027) with \$250								
1001548 STD Indiana University Foundation P O Box 500 Bloomington, IN 47402	\$0	\$1,500	\$0	\$0	\$0	\$0	\$0	\$1,500
To support the IU School of Journalism, in memoriam, the Beth Wood Award for J-students								
1001094 STD Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001256 STD Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide art education								
1001515 STD Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001096 STD Indianapolis Museum of Art 4000 Michigan Rd Indianapolis, IN 46208-3326	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support Nonie's Garden and the arts								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001358 STD Indianapolis Museum of Art 4000 Michigan Rd Indianapolis, IN 46208-3326	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support Nonie's Garden at the museum's entrance								
1001375 STD Indianapolis Museum of Art 4000 Michigan Rd Indianapolis, IN 46208-3326	\$0	\$2,013	\$2,013	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001374 STD Indianapolis Zoological Society 1200 West Washington Street P O Box 22309 Indianapolis, IN 46222	\$0	\$2,013	\$2,013	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001445 STD IndyFeral, Inc PO Box 30054 Indianapolis, IN 46230-0054	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To help homeless, abandoned feral cats and kittens in Indianapolis								
1001092 STD Interfaith Youth Core 910 West Van Buren Street Chicago, IL 60607	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001134 STD Investigative Reporters and Editors, Inc Missouri School of Journalism 141 Neff Annex Columbia, MO 65211	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the IRE Endowment								

**Annual Report Financial Information - 2009**  
**Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001556 STD Ivy Tech Foundation 50 West Fall Creek Parkway North Drive Indianapolis, IN 46208	\$0	\$750	\$0	\$0	\$0	\$0	\$0	\$750
To support higher education.								
1001436 STD James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general support of Riley Hospital for Children								
1001487 STD James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To support the Art Therapy Program								
1001418 STD Joyce Meyer Ministries, Inc 700 Grace Parkway Fenton, MO 63026	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the Hand of Hope World Missions								
1001383 STD Just Friends, Inc 3600 25th Street Columbus, IN 47203	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide services to low-income senior citizens								
1001080 STD Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240	\$0	\$5,500	\$5,500	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001196 STD Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support medical research.								
1001458 STD Keep Indianapolis Beautiful, Inc 1029 Fletcher Avenue, Suite 100 Indianapolis, IN 46203	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1000640 STD KIPP New Orleans 1607 S Carrollton Avenue New Orleans, LA 70115	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Matching Gift</b>								
1001098 STD Kiwanis Foundation of Indianapolis, Inc 320 North Meridian, Suite 1020 Indianapolis, IN 46204	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To support college scholarships								
1001296 STD Knox College 2 East South Street, K-230 Galesburg, IL 61401	\$0	\$5,700	\$5,700	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001300 STD Kongsvinger Lutheran Church P O Box 97 Donnelly, MN 56235	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
For current or future cemetery upkeep and repairs in honor of the Brandt and Awumb families								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001471 STD Kongsvinger Lutheran Church P O Box 97 Donnelly, MN 56235	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
For current or future cemetery upkeep and repairs in honor of the Brandt and Awsumb families								
1001244 STD Leukemia & Lymphoma Society, The 941 East 86th Street Suite 100 Indianapolis, IN 46240-1842	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support for the Peter French Man of the Year Campaign								
1001329 STD Leukemia & Lymphoma Society, The 651 West Washington Boulevard, Suite 400 Chicago, IL 60661	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide support for the "Light the Night Walk" to fight leukemia, lymphoma and myeloma and improve the quality of life of patients and their families								
1001367 STD Leukemia & Lymphoma Society, The 941 East 86th Street Suite 100 Indianapolis, IN 46240-1842	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support for Cindy Reinbold's race.								
1001414 STD Leukemia & Lymphoma Society, The 5845 Richmond Highway, Suite 300 Alexandria, VA 22303	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support Leukemia and Lymphoma research								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001140 STD Lexington Catholic High School 2250 Clays Mill Road Lexington, KY 50403	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the education mission of the high school focused on preparing students for college and an ethical life								
1001066 STD Life Centers 8902 Vincennes Circle, Suite A Indianapolis, IN 45268	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the purchase, training, maintenance, operation, etc., of ultrasound equipment for Life Centers								
1001413 STD Light and Life Christian Preschool 8624 East County Road 100 South Avon, IN 46123	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support materials and activities for the 3 year-old class in honor of Josie Jenkins								
1001322 STD Light of the World Christian Church 4646 North Michigan Road Indianapolis, IN 46228	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the 40th Anniversary program								
1001473 STD Light of the World Christian Church 4646 North Michigan Road Indianapolis, IN 46228	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To help students through Martin University								
1001482 STD Linden Hall School for Girls 212 East Main Street Lititz, PA 17543	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
For the Patricia Sullivan Fund to promote learning in the Theater Department								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001292 STD Lundenwood University 209 South Kings Highway St Charles, MO 63301	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001344 STD Little Red Door Cancer Agency, The 1801 N Meridian Street Indianapolis, IN 46202	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001051 STD Little Sisters of the Poor 2345 West 86th Street Indianapolis, IN 46260	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide support where needed								
1001320 STD Little Sisters of the Poor 2345 West 86th Street Indianapolis, IN 46260	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide support where needed								
1001500 STD Little Sisters of the Poor of Indianapolis, Inc 2345 West 86th Street Indianapolis, IN 46260	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To support any need								
1001360 STD Lyme Congregational Church P O Box 27 Lyme, NH 03768	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the Bicentennial Campaign to preserve and restore the 200 year old church building								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001230 STD March of Dimes Foundation 1258 Washington Street Columbus, IN 47201	\$0	\$888	\$888	\$0	\$0	\$0	\$0	\$0
To support fundraising efforts by the Zeta Phi Beta Sorority, Inc., Upsilon Kappa Zeta Chapter team, for the 2009 March of Dimes March for Babies Campaign								
1001301 STD Marian High School 1311 South Logan Street Mishawaka, IN 46544	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general program support								
1001090 STD Martin Luther King Multi-Service Center Indianapolis, Inc 40 West 40th Street Indianapolis, IN 46208	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support community social services								
1001067 STD Mayo Foundation 200 1st Street, Southwest Rochester, MN 55905	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support for Chronic Lymphocytic (CLL) Leukemia Research without restriction								
1001549 STD Mayo Foundation 200 1st Street, Southwest Rochester, MN 55905	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To support CLL research								
1001117 STD Mental Health Association in Marion County, Inc 301 East 38th Street Indianapolis, IN 46205	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009**  
**Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001295 STD Mercer County Community College Foundation, Inc P O Box B Trenton, NM 08690	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support WWFM Public Radio								
1001077 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001128 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support public television and radio								
1001209 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$408	\$408	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001210 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support for WFYI television and radio								
1001227 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support Public Radio								



**Annual Report Financial Information - 2009**  
**Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001378 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001401 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001460 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001461 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support programs and services (educational, informational and cultural) provided by WFYI to the community								
1001462 STD Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support National Public Radio								
1001422 STD Metropolitan School District of Lawrence Township 11660 Fox Road Indianapolis, IN 46236	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the kindergarten library and classroom enrichment								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001243 STD Michael J Fox Foundation for Parkinson's Research 90 Broad Street New York, NY 10004	\$0	\$1,665	\$1,665	\$0	\$0	\$0	\$0	\$0
To support Parkinson's research in memory of Anthony Walsh								
1001276 STD Michael J Fox Foundation for Parkinson's Research 90 Broad Street New York, NY 10004	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general support in honor of her father, Anthony Walsh								
1001537 STD Michael J Fox Foundation for Parkinson's Research 90 Broad Street New York, NY 10004	\$0	\$195	\$195	\$0	\$0	\$0	\$0	\$0
To provide support for research programs.								
1001441 STD Midwest Academy, Inc 801 Congressional Boulevard, Suite 600 Carmel, IN 46032	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To support the financial need-based scholarship fund								
1001182 STD Montshire Museum of Science One Montshire Road Norwich, VT 05055-9905	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001222 STD Moody Bible Institute of Chicago 820 North LaSalle Boulevard Chicago, IL 60610	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide support where needed								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001158 STD Muscular Dystrophy Association 3300 East Sunrise Drive Tuscon, AZ 85718	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
To support the Hamilton County Indiana MDA Clinic								
1001370 STD National Alliance on Mental Illness, Inc P O Box 22697 Indianapolis, IN 46209-2222	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide general support in memory of Gus Wantanabi								
1001155 STD National Arbor Day Foundation P O Box 80208 Lincoln, NE 68501	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001119 STD National Association of Elementary School Principals Foundation 1615 Duke Street Alexandria, VA 22314	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support educational programs to support principal leadership development								
1001028 STD National Foundation for Cancer Research 4600 East West Highway, Suite 525 Bethesda, MD 20814	\$3,000	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001100 STD National Kidney Foundation of Indiana 911 East 86th Street, Suite 100 Indianapolis, IN 46240	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support in memory of Amy Grismore								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001400 STD Nature Conservancy 22 Bridge Street, 4th Floor Concord, NH 03301	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001106 STD New Harmony Project, The P.O. Box 441062 Indianapolis, IN 46244	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001553 STD New Harmony Project, The P.O. Box 441062 Indianapolis, IN 46244	\$0	\$600	\$0	\$0	\$0	\$0	\$0	\$600
To provide general support								
1001193 STD Northern Stage Company PO Box 4287 White River Junction, VT 05001	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001417 STD Northwestern University 2020 Ridge Avenue, Suite 230 Gift/Record Services Evanston, IL 60208-4305	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support for the Kellogg School of Management's SEEK program.								
1001323 STD Northwood Christian Church 4550 Central Avenue Indianapolis, IN 46205	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
To support the ministry of the church including communication and the food bank								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001070 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
As an annual gift at the Sorin Level								
1001125 STD	\$0	\$20,000	\$20,000	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To provide general support for educational access and advancement								
1001275 STD	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support the Ford Family Project's community engagement efforts in Nnindye, Uganda								
1001306 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support the Annual Fund for the Sorin Society.								
1001514 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support the Annual Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001493 STD Oaks Academy, The 2301 N Park Avenue Indianapolis, IN 46205	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To support the Annual Fund</b>								
1001416 STD Ohio Dominican University 1216 Sunbury Road Columbus, OH 43219	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
<b>To support the men's basketball program</b>								
1001532 STD One Paw At A Time 191 East Bunker Hill Road Mooreville, IN 46158	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
<b>To support the care of rescued dogs.</b>								
1001205 STD Open Doors of Washington Township, Inc PO Box 196 Westfield, IN 46074	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To provide supplies and food for clients</b>								
1001545 STD Open Doors of Washington Township, Inc PO Box 196 Westfield, IN 46074	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
<b>To support food purchases for the holiday and for general support</b>								
1001200 STD Open Fields, Inc Thretford Hill Box 53 Thetford, VT 05074	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
<b>To provide general support without restriction</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001081 STD Operation Smile 6435 Tidewater Drive Norfolk, VA 23509	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001423 STD Orchard School Foundation 615 West 64th Street Indianapolis, IN 46260	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To support the Annual Giving Campaign for 2009-2010								
1001404 STD Our Lil Bit of Heaven Animal Rescue & Sanctuary 4259 Mangus Road Poland, IN 47868	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
To provide help for the septic project or where needed most								
1001562 STD Over Coming Together, Inc 2625 North Meridian Street, Suite 108 Indianapolis, IN 46208	\$0	\$600	\$0	\$0	\$0	\$0	\$0	\$600
To support any need in memory of Mary Elizabeth Pogue								
1001120 STD Paul Oliver Memorial Hospital Foundation 224 Park Avenue Frankfort, MI 49635	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide scholarships for the Physician-in-Training Program								
1001107 STD People Assisting Animals In Need, Inc P O Box 141 Batesville, IN 47006	\$0	\$360	\$360	\$0	\$0	\$0	\$0	\$0
To support the fundraising efforts of PAAIN								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001217 STD People Assisting Animals In Need, Inc P O Box 141 Batesville, IN 47006	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
For general support in honor of the work Linda Smith does fostering pets.								
1001350 STD Permanent Endowment Fund for Martha's Vineyard P O Box 1182 Oak Bluffs, MA 02557	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
To provide scholarships for low income students Please refer to the attached memo								
1001179 STD Phillips Exeter Academy 20 Main Street Exeter, NH 03833-2460	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support for the annual fund without restriction								
1001566 STD Phillips Exeter Academy 20 Main Street Exeter, NH 03833-2460	\$0	\$1,500	\$0	\$0	\$0	\$0	\$0	\$1,500
To provide unrestricted support for the annual fund								
1001299 STD Phoenix Theatre 749 North Park Avenue Indianapolis, IN 46202	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001132 STD Planned Parenthood Federation of the United States 434 West 33rd Street New York, NY 10001	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001304 STD Planned Parenthood Federation of the United States 434 West 33rd Street New York, NY 10001	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001162 STD Planned Parenthood of Indiana, Inc 200 South Meridian Street, Suite 400 P O Box 397 Indianapolis, IN 46206	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001285 STD Planned Parenthood of Indiana, Inc 200 South Meridian Street, Suite 400 P O Box 397 Indianapolis, IN 46206	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001340 STD Planned Parenthood of Indiana, Inc 200 South Meridian Street, Suite 400 P O Box 397 Indianapolis, IN 46206	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general support for non-abortion services								
1001321 STD Presbyterian Church of Teaneck One Church Street Teaneck, NJ 07666	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001287 STD President and Trustees of Bates College 2 Andrews Road Lewiston, ME 04240	\$0	\$12,000	\$12,000	\$0	\$0	\$0	\$0	\$0
To support the Bates Annual Fund and the Mays Scholarship								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001305 STD Priests of Holy Cross Indiana Province, Inc PO Box 774 Notre Dame, IN 46556	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
To provide health care of elderly and retired religious								
1001049 STD PrimeLife Enrichment, Inc 1078 Third Avenue, Southwest Carmel, IN 46032	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001116 STD Providence Cristo Rey High School 75 N Bellview Place Indianapolis, IN 46222	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support of the school								
1001278 STD Ronald McDonald House of Indiana 435 Limestone Indianapolis, IN 46202	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001123 STD Rose-Hulman Institute of Technology 5500 Wabash Avenue Terre Haute, IN 47803	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
In memory of Samuel W Hart								
1001108 STD Ruth Lilly Health Education Center 2055 N Senate Indianapolis, IN 46202	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001395 STD RVPE Foundation 900 Garden View Drive Apple Valley, MN 55124	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide direct service to Project Explore clients in honor of Shad Chapman and his family								
1001040 STD Sagamore Institute, Inc 1630 North Meridian Street Suite 450 Indianapolis, IN 46202	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001033 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support where needed								
1001034 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide food and shelter for those in need								
1001113 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001126 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001215 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide any need								
1001481 STD Salvation Army, The 1445 West Broward Boulevard Ft. Lauderdale, FL 33312	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001522 STD Salvation Army, The P O. Box 984 Indianapolis, IN 46206	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide support where needed								
1001567 STD Salvation Army, The P O Box 984 Indianapolis, IN 46206	\$0	\$600	\$0	\$0	\$0	\$0	\$0	\$600
To provide general support								
1001212 STD Secena Memorial High School 5000 Nowland Ave Indianapolis, IN 46201	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund Drive								
1001213 STD Secena Memorial High School 5000 Nowland Ave Indianapolis, IN 46201	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide financial aid to students								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001328 STD Secena Memorial High School 5000 Nowland Ave Indianapolis, IN 46201	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
<b>To provide tuition assistance</b>								
1001510 STD Secena Memorial High School 5000 Nowland Ave Indianapolis, IN 46201	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support</b>								
1001274 STD Scholarship America 1550 American Boulevard East, Suite 155 Minneapolis, MN 55425	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To support the 2009 Annual Board Campaign</b>								
1001452 STD School on Wheels, Corp 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
<b>To support educational efforts by School on Wheels.</b>								
1001324 STD Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001151 STD Shepherd Community Center, Inc an Urban Ministry of the Church of the Nazarene 4107 East Washington Street Indianapolis, IN 46201	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support without restriction</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001165 STD Shriners Hospitals for Children 2211 North Oak Park Avenue Chicago, IL 60707	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To provide general support in honor of Helen Minniek, posthumously.								
1001446 STD Sisters of the Blessed Sacrament 1663 Bristol Pike Bensalem, PA 19020	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001147 STD Smile Train, The 41 Madison Avenue, 28th Floor New York, NY 10010	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001050 STD Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104	\$0	\$270	\$270	\$0	\$0	\$0	\$0	\$0
To support the work of the Center to promote acceptance of diversity and reduce intolerance								
1001526 STD Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104	\$0	\$1,080	\$1,080	\$0	\$0	\$0	\$0	\$0
To support the Center work in fighting hate groups and supporting multicultural understanding								
1001156 STD Southport Presbyterian Church 7525 McFarland Boulevard Indianapolis, IN 46227	\$0	\$7,200	\$7,200	\$0	\$0	\$0	\$0	\$0
For capital expenses								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001382 STD Special Olympics, Inc P O Box 497 Indianapolis, IN 46206-0497	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001523 STD St Charles Borromeo School 2224 East Third Street Bloomington, IN 47401	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the school's Wish List program								
1001456 STD St Ignatious College Prep 1076 West Roosevelt Road Chicago, IL 60608	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001277 STD St. John's Greek Orthodox Church 602 Park Avenue Omaha, NE 68105	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the Renovation Project in honor of the baptism of Konstantine A. Schweer and his family								
1001392 STD St. Joseph Montessori School 933 Hamlet Street Columbus, OH 43201	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the 2009-2010 Annual Fund								
1001464 STD St. Joseph's Indian School North Main Street Chamberlain, SD 57326	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
To help support Lakota boys and girls at St. Joseph's Indian School								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001149 STD St Jude's Children Research Hospital 501 St Jude Place Memphis, TN 38015	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide support without restriction								
1001150 STD St Jude's Children Research Hospital 501 St Jude Place Memphis, TN 38015	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1001437 STD St Jude's Children Research Hospital 501 St Jude Place Memphis, TN 38015	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support in memory of Michael Callon.								
1001534 STD St Jude's Children Research Hospital 501 St Jude Place Memphis, TN 38015	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001303 STD St Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To support the creation of a virtual church								
1001415 STD St Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the Educational Resource Center for children.								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001161 STD St Matthew Catholic Church 4100 East 56th Street Indianapolis, IN 46220	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
<b>To support the Legacy of Our Mission Campaign</b>								
1001251 STD St Matthew Catholic Church 4100 East 56th Street Indianapolis, IN 46220	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
<b>To provide general parish support.</b>								
1001318 STD St Peters at the Light Episcopal Church 7th & Central Ave, PO Box 428 Barnegat Light, NJ 08006	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
<b>To support community outreach</b>								
1001101 STD St Therese (Little Flower) Catholic Church 4720 E 13th Street Indianapolis, IN 46201	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
<b>To support the work of the St. Therese Catholic Church parish and community</b>								
1001102 STD St Therese (Little Flower) Catholic Church 4720 E 13th Street Indianapolis, IN 46201	\$0	\$3,600	\$3,600	\$0	\$0	\$0	\$0	\$0
<b>To support general operating expenses</b>								
1001260 STD St Therese (Little Flower) Catholic Church 4720 E 13th Street Indianapolis, IN 46201	\$0	\$4,350	\$4,350	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support for the Little Flower parish and the school</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001309 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th Street Indianapolis, IN 46201	\$0	\$4,350	\$4,350	\$0	\$0	\$0	\$0	\$0
<b>To provide general operating support for the parish</b>								
1001310 STD St. Therese (Little Flower) Catholic Church 4720 E. 13th Street Indianapolis, IN 46201	\$0	\$1,050	\$1,050	\$0	\$0	\$0	\$0	\$0
<b>To support the work of the parish and community</b>								
1001326 STD St. Vincent Hospital Foundation 8240 Naab Road, Suite 160 Indianapolis, IN 46260	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
<b>To support the fundraising efforts of Granny's Girls and Boys Team (#530135-3) for the Weekend to End Breast Cancer event</b>								
1001362 STD St. Vincent Hospital Foundation 8402 Harcourt Road, Suite 210 Indianapolis, IN 46260	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
<b>To support breast cancer programs</b>								
1001363 STD St. Vincent Hospital Foundation 8402 Harcourt Road, Suite 210 Indianapolis, IN 46260	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
<b>To support the fundraising efforts of Granny's Girls and Boys Team (#530135-3) for the Weekend to End Breast Cancer event</b>								
1001379 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To support the Starfish van</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001503 STD Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To support the General Fund								
1001554 STD Summit County Family Resource Center PO Box 4056 Dillon, CO 80435	\$0	\$1,200	\$0	\$0	\$0	\$0	\$0	\$1,200
To support the general fund								
1001563 STD Susan G Komen Breast Cancer Foundation PO Box 650309 5005 LBJ Fwy, Ste 250 Dallas, TX 75265-0309	\$0	\$180	\$0	\$0	\$0	\$0	\$0	\$180
To provide general support for research programs.								
1001184 STD Susan G Komen Race for the Cure, The 1099 N Meridian Street Indianapolis, IN 46204-1075	\$0	\$345	\$345	\$0	\$0	\$0	\$0	\$0
To support the Granny's Girls and Boys Team's participation in the 2009 Race for the Cure in Indianapolis.								
1001236 STD Susan G Komen Race for the Cure, The 1099 N Meridian Street Indianapolis, IN 46204-1075	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001110 STD Susquehanna University 514 University Avenue Selinsgrove, PA 17870	\$0	\$20,000	\$20,000	\$0	\$0	\$0	\$0	\$0
To support educational advancement programs								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001261 STD Tangram, Inc 5155 Pennwood Drive Indianapolis, IN 46205	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001240 STD Therapy Dogs International 88 Bartley Road Flanders, NJ 07836	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
In honor of the Krishnans and Shanti								
1000994 STD Trinity Baptist Church of Westfield, Inc P O Box 521 Westfield, IN 46074	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
To support the General Fund								
1001160 STD Trinity Baptist Church of Westfield, Inc P O Box 521 Westfield, IN 46074	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the General Fund								
1001435 STD Trusted Mentors, Inc 872 Virginia Avenue Indianapolis, IN 46203	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support for the Bags-2-Riches program								
1001194 STD Trustees of Dartmouth College 6066 Development Office Hanover, NH 03755	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001565 STD Trustees of Dartmouth College 6066 Development Office Hanover, NH 03755	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$3,000
To provide unrestricted support for the annual fund								
1001432 STD Union Hospital Foundation 1606 North 7th Street Terre Haute, IN 47804	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support scholarships.								
1001494 STD United Negro College Fund Suite 203 3737 North Meridian Street Indianapolis, IN 46208	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support scholarships								
1001561 STD United Synagogue of Conservative Judaism 820 Second Avenue New York, NY 10017-4504	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$3,000
To support Project Reconnect (Alumni Association)								
1001063 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Recovery School at Fairbanks, Hope Academy								
1001064 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide support for the United Christmas Service								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001145 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the 2009 Campaign through Huntington Investment's campaign								
1001373 STD United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208	\$0	\$10,568	\$10,568	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001426 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support for the annual drive</b>								
1001492 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To provide home heating assistance for those in need</b>								
1001520 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
<b>To support the United Way Annual Campaign and the general fund</b>								
1001521 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
<b>To support the United Way Annual Campaign and the general fund</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001531 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$516	\$516	\$0	\$0	\$0	\$0	\$0
To support the United Way General Fund for 2009-2010								
1001544 STD United Way of Central Indiana, Inc 3901 North Meridian Indianapolis, IN 46208	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide support where needed								
1001232 STD United Way of Whitewater Valley 129 South 9th Street Richmond, IN 47374	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
To support Rick Killion's fundraising efforts on behalf of the 5th Annual United Way Golf Marathon on June 19, 2009.								
1001455 STD University of Dubuque 2000 University Avenue Dubuque, IA 52001	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To support the Annual Mission Vision Fund								
1001327 STD University of Florida Foundation, Inc P O Box 14425 Gainesville, FL 32604-2425	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the Dean's Fund for Excellence in Liberal Arts and Sciences								
1001111 STD University of Illinois Foundation PO Box 3429 Champaign, IL 61826-3429	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support the Ruth Ann Clark Scholarship Fund supporting degree completion by speech communication students at the University of Illinois								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001183 STD University of Northern Colorado Foundation, Inc Judy Farr Center Campus Box 20 1620 Reservoir Road Greeley, CO 80639	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the Linnea Erikson Henry Scholarship Endowment Fund								
1001250 STD University of Northern Colorado Foundation, Inc Judy Farr Center Campus Box 20 1620 Reservoir Road Greeley, CO 80639	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support the University of Northern Colorado Libraries								
1001083 STD UPMC Presbyterian Shadyside Forbes Tower, Suite 8084 3600 Forbes Avenue at Meyran Avenue Pittsburgh, PA 15213	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general operating support in memory of Joe Fahy								
1001530 STD Upper Valley Land Trust 19 Buck Road Hanover, NH 03755	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001424 STD Upper Valley United Way 10 Bank Street Box 491 Lebanon, NH 03766	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction in support of the annual drive								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001297 STD Vigo County Education Foundation 686 Wabash Avenue P.O. Box 3703 Terre Haute, IN 47808	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
<b>To support teacher scholarships</b>								
1001076 STD Villages of Indiana, Inc., The 652 N Girls School Road #240 Indianapolis, IN 46214-3662	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
<b>To provide child services</b>								
1001524 STD Villages of Indiana, Inc. The 652 N Girls School Road #240 Indianapolis, IN 46214-3662	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To provide general support</b>								
1001195 STD Visiting Nurse Association & Hospice of Vermont and New Hampshire 331 Olcott Drive White River Junction, VT 05001	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To provide general support without restriction</b>								
1001099 STD Wellness Community Central Indiana, The 5150 West 71st Street Indianapolis, IN 46268	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
<b>To support any need</b>								
1001078 STD Wesleyan Church Corporation P O Box 50434 Indianapolis, IN 46250	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
<b>To provide support for the work of the England family, missionaries in Croatia</b>								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001407 STD Wesleyan Church Corporation P O Box 50434 Indianapolis, IN 46250	\$0	\$1,650	\$1,650	\$0	\$0	\$0	\$0	\$0
To provide support for the work of the England family, missionaries in Croatia								
1001079 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide food and shelter to those in need								
1001130 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support any need								
1001527 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204	\$0	\$81	\$81	\$0	\$0	\$0	\$0	\$0
To feed the hungry.								
1001535 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide support where needed. most								
1001546 STD Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide social services								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001042 STD Xavier University of Louisiana 1 Drexel Drive New Orleans, LA 70125-1098	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001443 STD Xavier University Preparatory School Office of Development 5116 Magazine Street New Orleans, LA 70115-1844	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction								
1001163 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support the Ted Boyd Scholarship Fund								
1001231 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
To support the Annual Fund								
1001234 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To support the Strong Kids Campaign								
1001035 STD Young Audiences of Indiana, Inc 3921 North Meridian Street Indianapolis, IN 46208-4011	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support educational programs for primary or secondary students								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Matching Gift</b>								
1001045 STD Young Audiences of Indiana, Inc 3921 North Meridian Street Indianapolis, IN 46208-4011	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To prove support for education in the arts								
1001313 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$330	\$330	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (Acct X8164/Campbell)								
1001314 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (Acct X8164/Campbell)								
1001315 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the Young Life operations in Costa Rica (Account x8164/Campbell)								
1001316 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the work of Young Life in Costa Rica (Acct X8164/Campbell)								
1001330 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to All Campbell's salary or personal benefits								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001331 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001332 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001333 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001334 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001386 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001393 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell). No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001394 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001468 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (Acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits								
1001469 STD Young Life P O Box 520 Colorado Springs, CO 80901	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support Young Life operations in Costa Rica (Acct x8164/Campbell) No part of this gift may be assigned to Ali Campbell's salary or personal benefits.								
1001139 STD Young Mens Christian Association of Oak Park IL 255 South Marron Street Oak Park, IL 60302	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To benefit the Oak Park Swimmers' Top Swim Fundraiser.								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1001238 STD Youth for Christ, Inc 4707 West 72nd Street Indianapolis, IN 46268	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To support the Central Indiana Youth for Christ ministry as they raise money by running the Mini-Marathon								
1001133 STD Y-Press Inc 307 N Pennsylvania Street Fifth Floor Indianapolis, IN 46204	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001248 STD Zionsville West Middle School Parent Teacher Organization, Inc. 5565 South 700 East Whitestown, IN 46075	\$0	\$270	\$270	\$0	\$0	\$0	\$0	\$0
To support the PTO's fundraising drive								
1001341 STD Zoe's Bone Marrow Buddies P O Box 19 Westfield, IN 46074	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support								
Total for Matching Gift	\$18,000	\$1,061,845	\$1,048,126	\$0	\$2,625	\$0	\$0	\$29,094

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>Sponsorship</b>								
1001246 STD Guild, Inc 130 Wabasha Street South, Suite 90 Saint Paul, MN 55107	\$0	\$200	\$200	\$0	\$0	\$0	\$0	\$0
<p>To be used to support the IRTS program in Dakota County's South Saint Paul location for direct client support, particularly if it would allow an extended stay for those who could benefit from additional time in the home's environment. This gift is given on behalf of Candace Brandt, an employee of Lumina Foundation, in honor of the memory of her nephew, Mr. Stephen Chapman, who benefited from the programs and support offered by The Guild</p>								
<b>VIP Gift</b>								
1001499 STD American College Personnel Association Educational Leadership Foundation 312 West Commercial Street P O Box 227 East Rochester, NY 14445	\$0	\$200	\$200	\$0	\$0	\$0	\$0	\$0
Total for Sponsorship								
<b>To support the Research Grant Program</b>								
1001480 STD Auntie Mame's Child Development Center 3120 North Emerson Avenue Indianapolis, IN 46218	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001403 STD Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide endowment support								
1001387 STD Christ United Methodist Church 8540 US 31 South Indianapolis, IN 46227	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support the renovation of the Youth Building								



**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>VIP Gift</b>								
1001153 STD Coburn Place Safehaven II, Inc 604 East 38th Street Indianapolis, IN 46205	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001529 STD Community Foundation of Morgan County 250 North Monroe Street Mooresville, IN 46158	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support the One Road Christmas program								
1001504 STD Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To support the New Horizon Church Building Fund								
1001345 STD Family Services Association of Central Indiana, Inc 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support								
1001187 STD Girls Incorporated of Indianapolis, Inc 3959 N Central Avenue Indianapolis, IN 46205	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support								
1001528 STD Grantmakers for Effective Organizations 1725 DeSales Street Suite 404 Washington, DC 200036	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support								

**Annual Report Financial Information - 2009  
Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>VIP Gift</b>								
1001218 STD Humane Society for Hamilton County 1721 Pleasant Street Noblesville, IN 46060	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1001475 STD Indiana Sports Corporation Suite 1200 201 South Capitol Avenue Indianapolis, IN 46225	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support the non-profit as it continues to successfully plan, organize and host great events in Indianapolis								
1001208 STD Lapel High School 1850 South 900 West Lapel, IN 46051	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support Lapel High School's 2009 Post Prom activities								
1001249 STD Y-Press Inc 307 N Pennsylvania Street Fifth Floor Indianapolis, IN 46204	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support specialized reporting projects requiring travel.								
<b>Total for VIP Gift</b>								
	\$0	\$12,000	\$12,000	\$0	\$0	\$0	\$0	\$0
<b>Total for Standard Special Gifts</b>								
	\$18,000	\$1,271,545	\$1,257,826	\$0	\$2,625	\$0	\$0	\$29,094
<b>Grand Total</b>								
	\$18,000	\$1,271,545	\$1,257,826	\$0	\$2,625	\$0	\$0	\$29,094

**Lumina Foundation For Education**  
**Tax Return for Year Ending**

**Tax ID 35-1813228**

**December 31, 2009**

**Statement Number 18**

**Form 990 PF**

**Part XV**

**Line 3 b**

**Grants and Contributions Approved for Future Payment**

Recipient (Must be a 501(c)(3))

Purpose of grant or contribution

Amount

See Annual Report Financial Information - 2009 Grants by Theme for detail and purpose  
(attached to statement for Grants Paid)

\$ 27,176,270

See Annual Report Financial Information Special Programs - 2009 for detail and purpose  
(attached to statement for Grants Paid)

29,094

Less FASB required discount on Grants payable in excess of 12 months

(119,502)

**Net Grants payable per books**

**\$ 27,085,862**

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
Part 1

Interest and Dividends from Securities  
Line 4

Statement Number 19

Account Number	Account Name	Interest	Dividends	K-1's	Interest/ Dividends Column (b)
22-20000	ACWI	\$ 275,812	3,314,316		\$ 3,590,128
26-09293	Cash	54,844	104		54,948
26-09974	Southeastern	5,315	570,009		575,324
26-29139	Russell 3000	151	133,822		133,973
26-30950	Duff & Phelps	202	57,118		57,320
26-32677	Private Equity	4			4
26-32682	Real Estate	2			2
26-35374	TIPS	1,105,570	5		1,105,574
26-63609	Bain Capital Fund X	12	0	11,832	11,844
26-63610	Bennett Restructon	191	0	94,381	94,572
26-63611	Berkshire	0	0	47,839	47,839
26-63612	Blackstone IV	5	0	6,977	6,982
26-63613	Blackstone V	1	0	599	600
26-63615	Symphony (Adagio)	417	1		418
26-63616	Highfields Capital	0	0	18,633	18,633
26-63617	Indus Asia Fund	145	0		145
26-63620	Indus Japan Fund	118	0		119
26-63622	Litespeed Offshore	79	0		80
26-68367	Oz Funds	16	0		16
26-73392	Mason Capital	129	0		129
26-73393	Owl Creek	67	0		67
26-73397	Tiger	57	0		57
26-73399	Viking Global	123	0		123
26-73400	Davidson Kempner	680	1	37,581	38,262
26-73403	EnCap Energy VII-B	0	0	319,556	319,556
26-73404	EnerVest Energy XI-B	22	17	726,870	726,909
26-73405	Farallon Capital	0	0	8,017	8,017
26-73406	FIA Timber	3	0	11,445	11,448
26-73409	Graham Partners II	1	0	2,704	2,705
26-73411	Guggenheim ER/E III	28	0	29,527	29,555
26-73412	H. I. G Bayside Debt LBO II	1	0	459,075	459,077
26-73413	H I G. Brightpoint Cayman	8	0		9
26-73417	H I. G Capital Partners	0	0	10,106	10,106
26-73418	J L Partners	25	0		25
26-73420	Kelso VII	5	0	3,974	3,979
26-73421	Kelso VIII	3	1	85,295	85,299
26-73422	LaSalle Japan Fund	9	0		9
26-73424	MAP 2004, Inc	17	0	560,566	560,584
26-73425	Merit Energy Fund F-1	3	0	125,355	125,358
26-73429	GMO Emerging Fund III	2	730,826		730,829
26-73434	Natural Gas	0	0	14,220	14,220
26-73440	Novak Biddle	1	0	3,864	3,865
26-73441	OCM Opportunities	1	0	49,107	49,108
26-73445	OCM Real Estate Opportunities Fund III	10	0	40,371	40,381
26-73446	Sankaty Credit IV	2	0		2
26-73448	Silver Lake II	2	0	129,591	129,593
26-73449	Silver Lake III	0	0	6,226	6,226
26-73453	Venture Investments	0	0	19,003	19,003
26-73454	Venture Investments - Alpha	0	0	4,237	4,237

Lumina Foundation For Education  
 Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
 Part 1

Interest and Dividends from Securities  
 Line 4

Statement Number 19

Account Number	Account Name	Interest	Dividends	K-1's	Interest/ Dividends Column (b)
26-73457	ARCH Venture	0	0	4,940	4,940
26-73458	ArcLight Energy Fund IV	17	0	177,713	177,730
26-73459	Avenue Special Fund III	9	0	55	64
26-73461	Bain Capital Fund VIII	0	263	576	839
26-73484	Walton	0	0	16,887	16,887
26-73486	US Venture Partners X	0	0	420	420
26-73488	Great Hill	0	0	333	333
26-73489	Bain X Coinvestment	0	0	10	10
26-73490	Guggenheim Real Estate	0	0	124,364	124,364
26-73494	Baupost	0	0	32,229	32,229
26-81556	SCS Fixed Income	2,811,767	16		2,811,783
26-81557	SCS Cash	7,002	7		7,010
26-86831	NTI Transition	202	4		207
26-88015	USA Core	54,594	1		54,595
26-88419	August Capital V	0	0	1,330	1,330
26-88421	SSGA 3000	3,091	2,830,247	139	2,833,477
26-88422	GMO US Quality	24	1,138,982		1,139,006
26-88424	Merit Energy Fund G	0	0	63,600	63,600
LUM02	H I. G Europe	0	0	2,098	2,098
LUM04	PIMCO Corp Bonds	2,504,347	10		2,504,356
Total Interest and Dividends		<u>\$ 6,825,371</u>	<u>\$ 8,775,526</u>	<u>\$ 3,251,645</u>	<u>\$ 18,852,541</u>

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF  
Part I

Lines 6a and Line 7

Net Gain/(Loss)

Statement Number 20

Account Number	Account Name	Gross Sales	Short Term	Long Term Capital Gains Dividends	Long Term	K-1s	Net Investment Income (column b)
Recap of Following Tax Letters for Gains							
22-20000	ACWI	\$ 30,524,235	\$ (914,849)		\$ (45,084,302)		\$ (45,999,151)
26-09293	Cash	7	(147)	58,289			58,143
26-09974	Southeastern	24,562,379	(3,017,812)		(3,381,501)		(6,399,313)
26-29139	Russell 3000	176,844	(35,642)	19,508	(68,042)		(84,175)
26-30950	Duff & Phelps	8,793,637	(4,878,735)	11,943	(3,908,926)		(8,775,719)
26-35374	TIPS	34,831,267			3,249,478		3,249,478
26-63610	Bennett Restruction					(2,202,155)	(2,202,155)
26-63611	Berkshire					14,676	14,676
26-63612	Blackstone IV					352,110	352,110
26-63613	Blackstone V					20,616	20,616
26-63616	Highfields Capital					(27,587)	(27,587)
26-63618	Indus Event Driven Fund	51,038	(251,019)				(251,019)
26-73400	Davidson Kempner					900,936	900,936
26-73405	Farallon Capital					7,101	7,101
26-73409	Graham Partners II					(286,365)	(286,365)
26-73411	Guggenheim ER/E III					(2,594,356)	(2,594,356)
26-73412	H I G Bayside Debt LBO II					(131)	(131)
26-73417	H I G Capital Partners					19,626	19,626
26-73418	J L Partners					-	-
26-73421	Keiso VIII					63,449	63,449
26-73432	GMO Foreign	30,121,038	(34,060,488)				(34,060,488)
26-73434	Natural Gas					9	9
26-73440	Novak Biddle					87,615	87,615
26-73441	OCM Opportunities					67,673	67,673
26-73445	OCM Real Estate Opportunities Fund III					(591,025)	(591,025)
26-73448	Silver Lake II					10,166	10,166
26-73449	Silver Lake III					10,183	10,183
26-73453	Venture Investments					(249,111)	(249,111)
26-73454	Venture Investments - Alpha					(251,816)	(251,816)
26-73457	ARCH Venture					(44,146)	(44,146)
26-73458	ArcLight Energy Fund IV					640,737	640,737
26-73459	Avenue Special Fund III					23,293	23,293
26-73461	Bain Capital Fund VIII	35,196	(22,905)			(22,972)	(45,877)
26-73484	Walton					(53,627)	(53,627)
26-73494	Baupost					24,078	24,078
26-81556	SCS Fixed Income	62,202,299	(286,012)		103,646		(182,366)
26-86831	NTI Transition	20,901	46				46
26-88015	USA Core	4,381,088	(6,599)				(6,599)
26-88421	SSGA R3000	35,440,104	404,611	15,958	(11,990,966)		(11,570,397)
LUM02	H I G Europe					4,692	4,692
		<u>\$ 231,140,033</u>	<u>\$ (43,069,550)</u>	<u>\$ 105,698</u>	<u>\$ (61,080,612)</u>	<u>\$ (4,053,505)</u>	<u>\$ (108,097,969)</u>
	Adjustment for loss not reported						108,097,969
	Reported on Line 7 990 PF						<u>\$ (0)</u>

Lumina Foundation For Education

Tax ID 35-1813228

Tax Return for Year Ending

December 31, 2009

Form 990 PF

Other Income

Statement Number

21

Part 1 Line 11

Total of Other Income listed on K-1s

Ordinary Income/(loss) (net of UBI)

\$ (130,290)

Net Income/(loss) from K-1s

(760,588)

Total

\$ (890,878)

Lumina Foundation For Education

Tax ID 35-1813228

Tax Return for Year Ending December 31, 2009

Form 990 PF

Interest Expense

Statement Number

22

Part 1

Line 17

	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Paid on K-1	\$	\$ 238,762	\$ 0	\$ 0
Paid Foreign Interest on Northern Trust Tax Letters	<u>0</u>	<u>93</u>	<u>0</u>	<u>0</u>
	\$ <u>-</u>	\$ <u>238,855</u>	\$ <u>0</u>	\$ <u>0</u>



Lumina Foundation For Education  
 Tax Return for Year Ending

December 31, 2009

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Statement Number 23

Part I Line 19

Description		Depreciation		Depreciation 2004	
		(A) Expense per books	(B) Net Investment Expense	(C) Adjusted Net Income	(D) Disbursements for charitable purposes (cash basis only)
Computer Equipment	Asset Life (Years) 3	\$ 62,256	\$ 8,539	\$ 0	0
Furniture and Equipment	5-10	98,059	13,449	0	0
Leasehold Improvements	10 years (Term of lease)	264,152	36,230	0	0
		<u>\$ 424,467</u>	<u>\$ 58,218</u>	<u>\$ 0</u>	<u>0</u>

Lumina Foundation For Education

Tax Return for Year Ending

December 31, 2009

Tax ID 35-1813228

Form 990 PF

Part IV Line 1

Capital Gain and Losses for Tax on Investment Income

Statement Number 24

a) List and describe the kind(s) of property sold	b) How Acquired	C) Date Acquired	d) Date Sold	e) Gross Sales Price	g) Cost	h) Gain or (Loss)
Total Publicly Traded Securities						
For Details see recap of Northern Trust Tax Letters Statement	20			\$ 231,140,033		\$ (104,044,464)
K - 1 Gains				N/A		(4,053,505)
Total				<u>\$ 231,140,033</u>		<u>\$ (108,097,969)</u>

**Lumina Foundation For Education**

**Tax ID 35-1813228**

**Tax Return for Year Ending**

**December 31, 2009**

**Form 990 PF**

**Part VII-A Line 11**

**Statement Regarding Activity**

**Statement Number 25**

Name and Address of Controlled Entity	Employer Identification Number	Description of Transfer	Amount of Transfer
<b>SCHF I-3 Investor LLP 7</b> Pilgrim Street London, EC4V 6LB, England	20-3406345	Cash Investment	\$ 84,818
Lumina Investments LLC is the General Partner in SCHF I-3.	20-3405024	Cash Investment	15
Lumina Foundation for Education, Inc. is a limited Partner in SCHF I-3			

## Expenditure Grants

Statement Number

26

Part VII-B

Lane 5c

## Exemption - Expenditure Grants

Name /address	Amount of Grant	Date of Grant	Purpose of Grant	Amount Expended by Grantee	To the Grantor's Knowledge, Grantee has diverted a portion of funds from the purpose of the grant (Yes/No)	Date of Reports Received from the Grantee	Dates and Results of Any Verification of the Grantee's Reports	Information
Communications Works, LLC 1725 N Street, Northwest, 6th Floor Washington, DC 20036	\$ 622,000	11/15/2008	To educate 11 states participating in the Making Opportunity Affordable initiative about possible options to build the case for addressing the urgent need to graduate millions more U S college students within existing financial resources	Spent \$577,024 during 2009	No	Interim Report 11/13/2009 Final Report 2/26/2010	Review interim reports in 4th quarter 2009 Grant period ends 12/31/2009 with final report due 2/28/2010 Received final report 2/26/2010, report reviewed and grant closed 4/8/2010	\$135,000 of grant was disbursed in 2008 Remaining balance of \$467,000 disbursed in 2009
HCM Strategists, LLC 429 3rd Street, Northeast Washington, DC 20001	\$ 2,013,400	07/23/2008	To explore and educate about state policy options and knowledge management for Making Opportunity Affordable initiative	Spent \$1,026,331 in 2009	No	Interim reports 1st - 12/16/2008 2nd - 7/31/2009	Reviewed and approved interim reports	\$600,000 of grant disbursed in 2008, \$999,400 disbursed in 2009 and the final \$414,000 is scheduled in 2010
Communications Works, LLC 1725 N Street, Northwest, 6th Floor Washington DC 20036	\$ 300,000	11/10/2009	To develop and implement communication and media strategies across states that advance productivity improvements within U S higher education	\$ 27,911 00	No	7/8/2010	Reviewed and approved interim reports	Final report due 1/31/2011
Communications Works, LLC 1725 N Street, Northwest, 6th Floor Washington, DC 20036	\$ 99,500	8/1/2009	To produce storytelling videos to help states make the case amount key stakeholders for improving higher education productivity (in association with the 2008 grant)	\$86,680 spent in 2009	No	Interim reports 9/2/2009 and 2/3/2010	Reviewed and approved interim reports	This is associated with the \$622,000 made in 2008 Final reports due November 2010
Catalytica, Inc 200 Roy Street, Suite 101 Seattle, WA 98109	116,000	3/10/2009	To explain and communicate to the field the lessons arising from a three-state exploration of Tuning at U S higher education institutions	116,000	No	Final Report due, 5/1/2010, received 1/21/2010	Reviewed, approved and closed	
Catalytica, Inc 200 Roy Street, Suite 101 Seattle, WA 98109	9,888	8/28/2009	To supplement the original grant to reflect higher than anticipated projected cost related to traveling, hiring a project coordinator, conducting additional interviews and producing video segments that were not anticipated when the original grant was made	9,888	No	Final Report due, 5/1/2010, received 1/21/2010	Reviewed, approved and closed	Supplemental Grant associated with \$116,000 dated 3/10/2009
Organization for Economic Cooperation and Development 2, rue Andre-Pascal 75775 Paris Cedex, 16 France	\$ 10,000	10/7/2008	To support the 2008 Institutional Management in Higher Education General Conference	Spent \$10,000 in 2008	No	4/27/2009	Reviewed and approved 4/28/2009	
Wardens and Scholars of New College, Oxford New College, Holywell Street OX1 3BN Oxford, United Kingdom	\$ 10,000	12/17/2008 12/19/2008	To support an education law round table in the United Kingdom	Spent \$10,000 in 2008	No	10/14/2009	Reviewed and approved 10/14/2009	

**Lumina Foundation For Education**

**Tax ID 35-1813228**

**Form 990 PF**

**Tax Return for Year Ending**

**December 31, 2009**

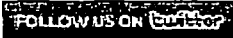
**Supplementary Information**

**Statement Number 27**

**Part XV Line 2**

**Guidelines for Grant Seekers**

See Attached Printout from WEB Site



## WHAT WE FUND

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Lumina Foundation supports efforts to increase awareness of the benefits of higher education, improve student access to and preparedness for college, improve student success in college and increase productivity across the higher education system. Such efforts include:

- Work that stimulates **broad-based and systemic change**, helping the Foundation to **accelerate progress on Goal 2025**.
- Work that focuses on promoting educational access and success for **underserved populations**, especially low-income students, students of color, first-generation college students and adult learners. *Please note, however, that we do not support direct service programs (see "What We Don't Fund").*
- Work to create a more informed environment that is willing to adopt more effective practices and **policy reform** around issues of access and success.
- Programs that demonstrate **capacity for long-term growth and sustainability**.
- Research and/or evaluation that results in **new knowledge and evidence** to strengthen opportunities for postsecondary access and success.
- Work that addresses increasing **efficiency, effectiveness and productivity** to more cost-effectively educate a significantly larger share of the U.S. population.
- **Collaborative work** among established organizations with broad, large-scale, interstate or national reach.

Grants vary in size by their scope. The median size of a grant is approximately \$250,000. The usual duration for a grant is one to three years. **As you consider submitting an inquiry, please pay attention to types of work we don't fund. See: What We Don't Fund »**



## WHAT WE DON'T FUND

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- **Partisan political or lobbying efforts** (in compliance with the Internal Revenue Code)
- **Direct service programs**, including:
  - Workforce training
  - Summer bridge programs for high school and college students
  - English as a second language courses
  - GED or other test preparation
  - Literacy training
  - Social/human services
- **Discipline-specific programs** or the creation of new degree programs
- **Graduate-level or professional programs**
- Unsolicited **institution-specific** projects not explicitly designed to stimulate change at a systemic level
- Individual **scholarships** or institutional scholarship programs
- **Capital campaigns** and endowments
- Requests exclusively for **equipment**, such as technology hardware and software
- Corporate sponsorships and fundraising events outside of Indianapolis, Indiana
- **Religious activities** (*We may consider grant requests from religious organizations if the proposed activities promote higher education access and success and serve diverse recipients, without regard to their religious backgrounds.*)
- **K-12 education reform**
- **Teacher education/training**
- Meetings and conferences, unless they relate to a Foundation program
- Curriculum development

Generally Lumina does not make grants to individual institutions; to read more about the criteria for the very limited number we do make, see *Funding FAQs* below.

## FUNDING FAQs

Q: I'm familiar with some of Lumina Foundation's early portfolio. Why are you no longer funding certain areas or types of work?

A: As the Foundation refines its strategic approach, we are not as focused on developing or replicating specific programs as we have been in the past. Instead our current focus is on creating an environment in which effective practices are explicitly connected to building public will and policies that support systemic change

Q: I am working on a project that will impact thousands of students in my city, state or university system. What is considered broad-based?

A: Driving progress on Goal 2025 will require work at all levels. However, given limited Foundation resources, we generally do not fund unsolicited proposals that are not designed, ultimately, to yield systemic, large-scale or nationwide impact.

Q: Does Lumina make institution-specific grants?

A: Lumina makes a very limited number of unsolicited institution-specific grants to help stimulate change in the field. For a single college to be eligible for a grant, we expect the institution to demonstrate how the grant will contribute not only to systemic transformation centered on a student success agenda on its own campus, but also at other campuses. Additionally, an applicant must demonstrate:

- How the institution is modeling data-based decision making.
- How the proposed work represents an institution-wide commitment to a student success agenda.
- How the work represents a significant contribution to building knowledge, policy or practice, as evidenced by a commitment to rigorous research or evaluation so as to prove results.

Q: Is it recommended that prospective grantees contact a Lumina Program Officer to discuss an idea prior to preparing a letter of inquiry?

A: We ask that all unsolicited inquiries be submitted as formal letters of inquiry (LOI) so that our staff may thoughtfully review each request in the context of our current strategic plan. Directly contacting a Program Officer prior to preparing an LOI does not expedite or provide a competitive advantage during the review process.

Next, read [Who and where we fund](#) »





## WHO AND WHERE WE FUND

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Lumina Foundation makes grants within the United States and its territories. In addition, as an Indiana-based foundation, we set aside a limited amount of grant funds each year for work that is specific to our hometown (Indianapolis) and home state. For unsolicited Indiana-specific requests, the median grant is typically \$100,000. These requests should follow the same guidelines as requests from out of state.

The Foundation occasionally may initiate a grant to an entity outside the United States to inform its work to expand access and success in postsecondary education in the United States.

Lumina Foundation makes grants to organizations that are classified as tax-exempt under section 501(c)(3) of the Internal Revenue Code and as public charities under section 509(a)(1), (2) or (3) of the Code or to public organizations that are designated under section 170(c) of the Code. Please note that Lumina Foundation for Education does not make grants to (a.) supporting organizations controlled by disqualified persons to Lumina or (b.) Type III supporting organizations that are not functionally integrated Type III supporting organizations (as such terms are defined in the Internal Revenue Code).

Next, read [Preparing and submitting a letter of inquiry](#) »



## PREPARING AND SUBMITTING A LETTER OF INQUIRY

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Lumina Foundation welcomes letters of inquiry (LOI) year-round from eligible organizations that seek funds for work within our mission and guidelines. Generally we review unsolicited inquiries through September. Inquiries submitted after September may be held for consideration the following year.

Organizations are not prohibited from submitting more than one inquiry at any time.

An LOI should describe the proposed work in three to five pages, using these questions as guidance:

- What are the intended outcomes, and how will the work achieve them? How does the work accelerate progress on Lumina's overarching goal (by 2025, 60 percent of the population in the United States will hold a postsecondary degree or credential)?
- Why is this work important to pursue at this time?
- What special qualifications does the organization bring to this effort?
- What other organizations are involved, if any? How will they contribute to the work?
- How does the proposed work relate to the applicant organization's mission?
- What is the geographic scope of the proposed work?
- What is the total cost of the effort? What amount do you seek from Lumina Foundation and for what period of time? What resources will other funders or organizations provide?

The Foundation considers *only* those inquiries that:

- Include a completed cover sheet .DOC | 200k, not to exceed one page.
- Are submitted on the letterhead of the sponsoring organization or institution


**Applicants are strongly encouraged to submit LOIs electronically.** Please send the **LOI on letterhead and completed cover sheet** as attachments to [newinquiry@luminafoundation.org](mailto:newinquiry@luminafoundation.org). Please do not send any additional materials (binders, media, etc.). Applicants are welcome to submit inquiries by mail at the address below but are asked *not* to submit a letter *both* electronically and by mail.

If you cannot submit electronically, please mail grant inquiries to:

Program Office — "New Inquiry"  
Lumina Foundation for Education  
P.O. Box 1806

Indianapolis, IN 46206-1806

Next, read [The review process](#) »

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|  [BOARD](#)



## THE REVIEW PROCESS

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An internal review panel carefully reviews every LOI that meets our criteria. Following the initial review, we will inform applicants within two months of receipt whether the inquiry fits our current priorities and resources. Due to limited resources, we cannot request proposals from all inquiries that meet our criteria. If we decide to request a full proposal, a Program Officer will contact the applicant to provide instructions on applying for a grant and request additional information. An invitation to submit a proposal does not guarantee funding.

An internal review panel also carefully considers all solicited proposals; occasionally, we invite external experts to review proposals as well. We are diligent in our efforts to respond promptly to proposals. Assuming potential grantees' timely responses to requests for information, the entire review and approval process typically takes approximately six months.

Also see [Solicited proposals](#) »



## SOLICITED PROPOSALS

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Lumina Foundation also identifies and initiates proactive programs that have the potential to systemically improve postsecondary access or success. We generally solicit participation in these efforts, rather than accepting unsolicited proposals. Currently, these programs include:

- **Achieving the Dream: Community Colleges Count**, a multi-year national initiative to help more community college students succeed. Achieving the Dream serves students at 102 community colleges in 22 states, with the support of 19 funders. **This program is currently not accepting unsolicited inquiries.**
- **Adult Degree Completion program**, to increase degree completion among adults who have earned some college credits. This program is currently not accepting unsolicited inquiries.
- **KnowHow2GO**, a public awareness campaign to inform eighth- through 10th-grade students about what it takes to prepare for and apply to college. Currently, our KnowHow2GO investments are focused mainly in Los Angeles, California; Florida; Illinois; Indiana; Kentucky; Ohio and Washington State. Other states have adopted elements of the KnowHow2GO campaign, including Iowa, Connecticut, Michigan, Montana, Nebraska, Tennessee and Wisconsin. **This program is currently not accepting unsolicited inquiries.** However, if your organization is affiliated with a statewide college access network or local program in the locations listed above and you would like more information about the KH2GO campaign and resources, please contact Jeanna Keller at [jkeller@luminafoundation.org](mailto:jkeller@luminafoundation.org).
- **Minority-Serving Institutions: Models of Success**, a program seeking to dramatically increase college completion, especially among first-generation students, low-income students and students of color. The MSI-Models of Success program aims to partner with MSIs and other organizations to improve and document increased postsecondary attainment. **This program is currently not accepting unsolicited inquiries.**
- **Tuning USA**, a faculty-led pilot project designed to define what students must know, understand and be able to demonstrate after completing a degree in a specific field. Tuning USA methodology is based on similar work to increase the transparency around what a degree represents under Europe's Bologna Process. **This program is currently not accepting unsolicited inquiries.**

**Lumina Foundation For Education**

**Tax ID 35-1813228**

**Form 990 PF**

**Tax Return for Year Ending**

**December 31, 2009**

**Statements Regarding Activities**

**Statement Number**

**28**

**Part VII-A Line 3**

**Changes to Articles, Bylaws or Similar Instruments**

See Attached

AMENDED AND RESTATED BYLAWS OF LUMINA FOUNDATION FOR  
EDUCATION, INC.

(as adopted by the Board of Directors on May 22, 2008 and revised March 21, 2009)

ARTICLE I

Objectives and Purposes

Section 1.1 Purposes. The purposes of Lumina Foundation for Education, Inc. (the "Corporation") are as set forth in its Amended and Restated Certificate of Incorporation (the "Certificate").

ARTICLE II

Members and Conditions of Membership

Section 2.1 Membership. The Members of the Corporation shall be those persons who are elected and are serving from time to time as Directors of the Corporation.

Section 2.2 Term and Termination of Membership. The term of Membership for any Member shall commence on the date of his or her election as Director of the Corporation and shall continue for so long as such Member is a Director. Any Member may resign from Membership in the Corporation by delivering written notice of such resignation to the Corporation. Resignation of Membership shall also constitute resignation from the Board of Directors (the "Board"). Except as otherwise provided by the Delaware General Corporation Law (the "DGCL") or these Bylaws, no rights, powers, privileges, obligations or duties as a Member shall survive the death or other termination of Membership of a Member.

Section 2.3 Minimum Membership. There shall at all times be not less than three nor more than 16 Members.

Section 2.4 Annual Meeting of Members. An annual meeting of Members shall be held for the purpose of electing the Directors on such date within the second quarter of each calendar year at such date, time and place, if any, as may be designated from time to time by the Board. Any other proper business may be transacted at the annual meeting.

Section 2.5 Special Meetings. Special meetings of Members may be called at any time by the Chair of the Board (the "Chair"), the Chief Executive Officer, or by a majority vote of the Board, made in writing to the Chair or the Secretary, to be held at such date, time and place, if any, as may be stated in the notice of the meeting.

Section 2.6 Notice of Meetings. Whenever Members are required or permitted to take any action at a meeting, a written notice of the meeting shall be given by the Corporation which shall state the date, time and place, if any, of the meeting, the means of remote communication, if any, by which Members may be deemed to be present in person and vote at such meeting, and, in the case of a special meeting, the purpose or purposes for which the meeting is called. Unless otherwise provided by the DGCL, the written notice of any meeting shall be given to each Member not less than 10 nor more than 60 days

before the date of the meeting. Such notice shall be delivered personally to each Member, or deposited in U.S. mail, postage prepaid, to each Member at each such Member's address as shown by the books or records of the Corporation.

Section 2.7 Quorum. At any meeting of the Members a majority of all the Members of the Corporation shall constitute a quorum for the transaction of business.

Section 2.8 Presence. The Board may permit Members not physically present at a meeting to participate, be deemed present in person and vote, in any meeting by means of remote communication; provided that (a) the Corporation shall implement reasonable measures to verify that each person deemed present and permitted to vote at the meeting by means of remote communication is a Member, (b) the Corporation shall implement reasonable measures to provide such Members a reasonable opportunity to participate in the meeting and to vote on matters submitted to the Members, including an opportunity to read or hear the proceedings of the meeting substantially concurrently with such proceedings, and (c) if any Member votes or takes other action at the meeting by means of remote communication, a record of such vote or other action shall be maintained by the Corporation. With respect to any annual meeting of the Members or any special meeting of the Members called by the Board, the Board may determine that the meeting shall not be held at any place, but may instead be held solely by means of remote communication, so long as the requirements set forth in this Section 2.8(a), (b) and (c) are satisfied.

Section 2.9 Voting. Each Member shall be entitled to one vote (no cumulative voting). Voting at meetings of the Members need not be by written ballot and need not be conducted by inspectors unless a majority of the Members present at such meeting shall so determine. Unless otherwise provided by the DGCL, the Certificate or these Bylaws, the affirmative vote of a majority of the Members present at a meeting at which a quorum is present shall be the act of the Members. No Member entitled to vote at a meeting of the Members or to express consent or dissent to corporate action without a meeting, may authorize another person or persons to act for such Member by proxy.

Section 2.10 Organization. Meetings of Members shall be presided over by the Chair or in the absence of the Chair by the Vice Chair of the Board (the "Vice Chair"), or in their absence by a chair designated by the Chair, or in the absence of the foregoing persons by a chair designated by the Board, or in the absence of such designation, by a chair chosen by the Members at the meeting. The Secretary, or in the absence of the Secretary, an Assistant Secretary, shall act as secretary of the meeting, but in the absence of the Secretary and any Assistant Secretary, the chair of the meeting may appoint any person to act as secretary of the meeting.

Section 2.11 Adjournments. Any meeting of Members, annual or special, may adjourn from time to time to reconvene at the same or some other place, if any, and notice need not be given of any such reconvened meeting if the time, place, if any, thereof and the means of remote communication, if any, by which Members may be deemed to be present in person and vote at such reconvened meeting are announced at the meeting at which the adjournment is taken; provided, however, that if the adjournment is for more than 30 days, or if after the adjournment a new date or new record date is fixed for the



reconvened meeting, a notice of the reconvened meeting shall be given to each Member. At the reconvened meeting the Corporation may transact any business which might have been transacted at the original meeting.

Section 2.12 Consent of Members in Lieu of Meeting. Any action required by the DGCL to be taken at any annual or special meeting of the Members, or any action which may be taken at any annual or special meeting of the Members, may be taken without a meeting, without prior notice and without a vote, if a consent or consents in writing, setting forth the action taken, shall be signed by a majority of all Members (other than the amendment of these Bylaws, which shall require the consent of all Members) and the writing or writings shall be delivered to the Corporation and filed with the minutes of the Members. An electronic transmission consenting to an action to be taken and transmitted by a Member shall be deemed to be written and signed for purposes of this Section 2.12; provided that such electronic transmission sets forth or is delivered with information from which the Corporation can determine (a) that the electronic transmission was transmitted by the Member, and (b) the date on which the Member transmitted such electronic transmission. No consent given by electronic transmission shall be deemed to have been delivered until such consent is reproduced in paper form and delivered to the Corporation. Prompt notice of the taking of the corporate action without a meeting by less than unanimous written consent shall be given to those Members who have not consented in writing and who, if the action had been taken at a meeting, would have been entitled to notice of the meeting.

### ARTICLE III

#### Board of Directors

Section 3.1 Powers; Number; Qualifications. The affairs of the Corporation shall be managed by or under the direction of the Board, except as may be otherwise provided by the DGCL or the Certificate. The Board shall consist of not less than three nor more than 16 Directors, the number thereof to be determined from time to time by the Board. Each Director shall be a person of legal age but need not be a resident of the State of Delaware.

Section 3.2 Election; Term of Office. At each annual meeting of the Members, the Members shall elect the Directors to serve for one-year terms until the next annual meeting, and in each case thereafter until a successor is elected and qualified, the Director resigns or is removed, or the Board decreases the number of Directors constituting the Board.

Section 3.3 Vacancies. Any vacancy on the Board for any reason, and any directorship resulting from any increase in the number of Directors, may be filled by the Board (acting by a majority of the Directors then in office if less than a quorum), and any Director so chosen shall hold office until the next annual meeting, and thereafter until a successor is elected and qualified, the Director resigns or is removed, or the Board decreases the number of Directors constituting the Board.

Section 3.4 Resignation; Removal. Any Director may resign at any time upon notice to the Corporation given in writing or by electronic transmission. Such resignation shall take effect at the time specified therein, and unless otherwise specified therein, no acceptance of such resignation shall be necessary to make it effective. Any Director who is also an employee of the Corporation or any of its Affiliates shall be deemed to have resigned as a Director of the Corporation upon termination of the employee's employment with the Corporation or such Affiliate. The term "Affiliate" for purposes of these Bylaws means any entity of which the Corporation is a controlling member or shareholder. Any Director or the entire Board may be removed, with or without cause, by a majority of all of the Members.

Section 3.5 Annual Meetings. An annual meeting of the Board shall be held for the purpose of electing officers on such date within the second quarter of each calendar year at such date, time and place as may be designated from time to time by the Board. Any other proper business may be transacted at the annual meeting of the Board.

Section 3.6 Regular Meetings. Regular meetings of the Board shall be held not less than three times annually and at such dates, times and places as the Board may from time to time determine. Notice is not required for any regular meeting of the Board.

Section 3.7 Special Meetings. Special meetings of the Board may be held at any date, time or place whenever called by the Chair, by the Chief Executive Officer, or by any three Directors. Unless waived, notice of a special meeting of the Board shall be given by the person or persons calling the meeting not less than five days in advance of such meeting, if the notice is given by mail or courier, telegraph or cable, and not less than 24 hours in advance of such meeting if the notice is given in person, by telephone, or facsimile or other electronic communication receipt of which is confirmed.

Section 3.8 Quorum. At any meeting of the Board, a majority of the entire Board shall constitute a quorum for the transaction of business.

Section 3.9 Presence. Members of the Board may participate in a meeting of the Board through the use of conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other, and participation in a meeting pursuant to this Section 3.9 shall constitute presence in person at such meeting.

Section 3.10 Voting. The vote of a majority of the Directors present at a meeting at which a quorum is present shall be the act of the Board unless the Certificate or these Bylaws shall require a vote of a greater number. In the event the Directors shall take action to remove a trustee or director of an Affiliate of the Corporation, such action shall require the affirmative vote of a majority of the entire Board. In case at any meeting of the Board a quorum shall not be present, the members of the Board present may adjourn the meeting from time to time until a quorum shall attend. No Director entitled to vote at a meeting of the Board or to express consent or dissent to corporate action without a meeting, may authorize another person or persons to act for such Director by proxy.

Section 3.11 Organization. Meetings of the Board shall be presided over by the Chair, or in the absence of the Chair by the Vice Chair, or in their absence by a chair designated

by the Chair, or in the absence of the foregoing persons by a chair chosen by the Board at the meeting. The Secretary, or in the absence of the Secretary an Assistant Secretary, shall act as secretary of the meeting, but in the absence of the Secretary and any Assistant Secretary, the chair of the meeting may appoint any person to act as secretary of the meeting.

Section 3.12 Consent of Directors in Lieu of Meeting. Any action required or permitted to be taken at any meeting of the Board may be taken without a meeting, without prior notice and without a vote, if all of the members of the Board consent (which consent shall set forth the action taken) thereto in writing or by electronic transmission, and the writing or writings or electronic transmission or transmissions are filed with the minutes of the Board.

Section 3.13 Compensation of Directors. The Board shall have the authority to fix the compensation of Directors.

## ARTICLE IV

### Committees

Section 4.1 Committees. The Board may, by resolution, create and establish an Executive Committee, an Audit and Finance Committee, an Investment Committee, a Compensation Committee and any one or more additional committees, as the Board may deem desirable for the furtherance of the objectives and purposes of the Corporation, and shall delegate to each such committee such powers as, in the discretion of the Board, are appropriate and desirable. The members and the Chair of each such committee shall be designated by the Board. The Chair shall present nominations therefor.

Section 4.2 Powers of the Committees. Any such committee shall have and may exercise all the powers and authority of the Board as determined by the Board's enabling resolution for such committee, as may be adopted from time to time, and may authorize the seal of the Corporation to be affixed to all papers which may require it. Notwithstanding the foregoing, no such committee shall have power or authority in reference to (a) approving or adopting any action or matter expressly required by the DGCL to be submitted to the Members for approval or (b) adopting, amending or repealing any of these Bylaws.

## ARTICLE V

### Officers

Section 5.1 Election of Officers. The Board shall elect a Chair and a President, and may elect a Vice Chair, and shall designate one of such officers as a Chief Executive Officer. If a person elected as Chair, President, or Vice Chair is not already a member of the Board, the Board may also elect him or her as a Director, to hold office until the next annual meeting, and thereafter until a successor is elected and qualified, the Director resigns or is removed, or the Board decreases the number of Directors constituting the Board. The Board may also elect one or more Executive Vice Presidents, Senior Vice

Presidents, Vice Presidents, a Treasurer and a Secretary, one or more Assistant Secretaries, one or more Assistant Treasurers and such other officers and assistant officers, none of whom need be a Director, as the Board from time to time may determine. The Board may define the duties of the officers and give any of them such further designations or alternative titles as the Board considers appropriate. Any two or more offices, except those of Chief Executive Officer and Secretary, may be held by the same person. Each such officer shall hold office, subject to the provisions of these Bylaws, until his or her successor is elected and qualified or until such officer's earlier resignation or removal. Vice Presidents (Executive, Senior or otherwise) referred to in this section shall include only those elected by the Board of Directors as provided in this section and shall not include those designated as non-officer Vice Presidents as provided in Section 5.8.

Section 5.2 Resignation; Removal; Vacancies. Any officer may resign at any time upon written notice to the Corporation. Such resignation shall take effect at the time specified therein, and unless otherwise specified therein, no acceptance of such resignation shall be necessary to make it effective. The Board may remove or suspend (with or without pay at the Board's discretion) any officer with or without cause at any time. Any such removal or suspension shall be without prejudice to the contractual rights of such officer, if any, with the Corporation, but the election of an officer shall not of itself create contractual rights. Any vacancy occurring in any office of the Corporation by death, resignation, removal or otherwise may be filled by the Board at any regular or special meeting.

Section 5.3 Chair of the Board of Directors. The Chair shall preside at all meetings of the Board and of the Members at which he or she shall be present and shall have and may exercise such other powers and duties as may, from time to time, be assigned to him or her by the Board and as may be provided by the DGCL. The Chair shall present nominations to the Board of persons to be designated by the Board as committee members or chairs.

Section 5.4 Vice Chair of the Board of Directors. The Vice Chair, at the request or in the absence of the Chair or during the Chair's inability to act, shall perform the duties of the Chair, and when so acting shall have the powers of the Chair. The Vice Chair shall have such other powers and shall perform such other duties as may, from time to time, be assigned to him or her by the Board, the Chair, or as may be provided by the DGCL.

Section 5.5 Chief Executive Officer. The Chief Executive Officer (who shall also be either the Chair, the Vice Chair or the President) shall have general charge and supervision of the affairs of the Corporation and shall exercise the powers and perform the duties incident to the office of Chief Executive Officer, subject to the direction of the Board. He or she shall have such other powers and duties as the Bylaws or the Board may from time to time prescribe.

Section 5.6 President. The President shall perform all duties incident to the office of President of the Corporation and such other duties as the Bylaws or the Board or, if he or she is not also Chief Executive Officer, as the Chief Executive Officer, pursuant to the authority of the Board, may from time to time prescribe.

Section 5.7 Vice Presidents. The Vice President (or Vice Presidents in the order established by the Board (e.g., Executive, Senior) if more than one), at the request or in the absence of the President or during the President's inability to act, shall perform the duties of the President, and when so acting shall have the powers of the President. If there be more than one Vice President, the Board may determine which of the Vice Presidents shall perform any of such duties; or if such determination is not made by the Board, the Chief Executive Officer may make such determination. The Vice President or Vice Presidents shall have such other powers and shall perform such other duties as may, from time to time, be assigned to him or her or them by the Board, the Chief Executive Officer, or the President, or as may be provided by the DGCL. Vice Presidents (Executive, Senior or otherwise) referred to in this section shall include only those elected by the Board of Directors as provided in Section 5.1 and shall not include those designated as non-officer Vice Presidents as provided in Section 5.8.

Section 5.8 Non-Officer Vice Presidents. The Chief Executive Officer or the Board of Directors may designate an employee as a non-officer Vice President of a particular unit or function of the Corporation. A Vice President designated pursuant to this Section shall not have authority to make administrative or policy decisions on behalf of the Corporation, but may recommend them and may, subject to approval by an officer of the Corporation, implement them. Designations pursuant to this section may include, for example, Vice President for Programs, Vice President for Evaluation or Vice President for Investments. A Vice President designated pursuant to this section shall not be an officer of the Corporation, and shall not have the powers set forth in Section 5.7, unless specifically elected as such as provided in Section 5.1.

Section 5.9 Secretary. The Secretary shall have the duty to record the proceedings of the meetings of the Members, the Board and any committees in a book or books to be kept for these purposes, shall see that all notices are duly given in accordance with the provisions of these Bylaws or as required by the DGCL, shall be custodian of the records of the Corporation, may affix the corporate seal to any document the execution of which, on behalf of the Corporation, is duly authorized, and when so affixed may attest the same, and, in general, shall perform all duties incident to the office of Secretary of the Corporation and such other duties as may, from time to time, be assigned to him or her by the Board or the Chief Executive Officer or as may be provided by the DGCL.

Section 5.10 Treasurer. Except as may be otherwise provided by the Board, the Treasurer shall have charge of and be responsible for all funds, securities, receipts and disbursements of the Corporation and shall deposit or cause to be deposited, in the name of the Corporation, all moneys or other valuable effects in such banks, trust companies or other depositories as shall, from time to time, be selected by or under authority of the Board. If required by the Board, the Treasurer shall give a bond for the faithful discharge of his or her duties, with such surety or sureties as the Board may determine. The Treasurer shall keep or cause to be kept full and accurate records of all receipts and

disbursements in books of the Corporation, shall render to the Chief Executive Officer and to the Board, whenever requested, an account of the financial condition of the Corporation, and, in general, shall perform all the duties incident to the office of Treasurer of the Corporation and such other duties as may, from time to time, be assigned to him or her by the Board or the Chief Executive Officer or as may be provided by the DGCL.

Section 5.11 Other Officers. The other officers, if any, of the Corporation shall have such powers and duties in the management of the Corporation as may be stated in a resolution of the Board which is not inconsistent with these Bylaws and, to the extent not so stated, as generally pertain to their respective offices, subject to the control of the Board. The Board may require any officer, agent or employee to give security for the faithful performance of his or her duties.

## ARTICLE VI

### Miscellaneous Provisions

Section 6.1 Fiscal Year. The fiscal year of the Corporation shall end on the 31st day of December of each year.

Section 6.2 Seal. The Corporation may have a corporate seal which shall have the name of the Corporation inscribed thereon and shall be in such form as may be approved from time to time by the Board. The corporate seal may be used by causing it or a facsimile thereof to be impressed or affixed or in any other manner reproduced.

Section 6.3 Facsimile Signatures. In addition to the provisions for use of facsimile signatures elsewhere specifically authorized in these Bylaws, facsimile signatures may be used whenever and as authorized by the Board.

Section 6.4 Waiver of Notice of Meetings of Members and Directors. Whenever notice is required to be given by the DGCL or under any provision of the Certificate or these Bylaws, a written waiver thereof, signed by the person entitled to notice, or a waiver by electronic transmission by the person entitled to notice, whether before or after the time stated in the notice, shall be deemed equivalent to notice. Attendance of a person at a meeting shall constitute waiver of notice of such meeting, except when the person attends a meeting for the express purpose of objecting, at the beginning of the meeting, to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted at, nor the purpose of, any regular or special meeting of the Members or the Board need be specified in any written waiver of notice or any waiver by electronic transmission unless so required by the Certificate or these Bylaws.

Section 6.5 Reliance upon Books, Reports and Records. Each Director shall, in the performance of his or her duties, be fully protected in relying in good faith upon the records of the Corporation and upon such information, opinions, reports or statements presented to the Corporation by any of the Corporation's officers or employees, or

committees of the Board, or by any other person as to matters the Director reasonably believes are within such other person's professional or expert competence and who has been selected with reasonable care by or on behalf of the Corporation.

Section 6.6 Indemnification.

(a) Actions, Suits or Proceedings. The Corporation shall indemnify and hold harmless, to the fullest extent permitted by applicable law as it presently exists or may hereafter be amended, any person who was or is a party or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative (a "proceeding"), by reason of the fact that the person is or was a Director, officer, or employee of the Corporation or, while a Director, officer, or employee of the Corporation, is or was serving at the request of the Corporation as a director, officer, employee or agent of another corporation, partnership, joint venture, trust, limited liability company, enterprise or nonprofit entity (including any employee benefit plan), against all liabilities, judgments, fines and amounts paid in settlement, and all expenses (including attorneys' fees) actually and reasonably incurred by the person in connection with such proceeding. Notwithstanding anything to the contrary in this Section 6.6, the Corporation shall not indemnify and hold harmless such a person seeking indemnification in connection with a proceeding initiated by the person unless the initiation thereof was approved by the Board.

(b) Advance of Expenses. Any expenses (including attorneys' fees) incurred by a person in defending a proceeding may be paid by the Corporation in advance of the final disposition of such matter; provided, however, that the payment of such expenses incurred by a person in advance of the final disposition of such matter shall be made only upon receipt of an undertaking by or on behalf of the person to repay all amounts so advanced in the event that it shall ultimately be determined that the person is not entitled to be indemnified by the Corporation as authorized in this Section 6.6. Such undertaking may be accepted without reference to the financial ability of such person to make repayment.

(c) Claims. If a claim for indemnification or payment of expenses under this Section 6.6 is not paid in full within 60 days after a written claim therefor has been received by the Corporation, the person seeking indemnification may file suit to recover the unpaid amount of such claim and, if successful in whole or in part, shall be entitled to be paid the expense of prosecuting such claim. In any such action the Corporation shall have the burden of proving that the person seeking indemnification is not entitled to the requested indemnification or payment of expenses under applicable law.

(d) Non-Exclusivity of Rights. The indemnification and advancement of expenses provided by this Section 6.6 shall not be deemed exclusive of any other rights to which a person seeking indemnification or advancement of expenses may be entitled under any statute, provision of the Certificate, these Bylaws, agreement, vote of Members or disinterested Directors or otherwise, both as to action in such

person's official capacity and as to action in any other capacity while holding office for the Corporation.

(e) Other Sources. The Corporation's obligations, if any, to indemnify or to advance expenses to any person who was or is serving at its request as a director, officer, employee or agent of another corporation, partnership, joint venture, limited liability company, enterprise or nonprofit entity (including an employee benefit plan) shall be reduced by any amount such person may collect as indemnification or advancement of expenses from such other entity.

(f) Insurance. The Corporation may purchase and maintain insurance, at its expense, to protect itself and any Director, officer, employee or agent of the Corporation or another corporation, partnership, joint venture, trust or other enterprise (including any employee benefit plan) against any liability asserted against such person and incurred by such person in any such capacity, or arising out of such person's status as such, whether or not the Corporation would have the power to indemnify such person against such liability under the DGCL.

(g) Merger or Consolidation. If the Corporation is merged into or consolidated with another corporation and the Corporation is not the surviving corporation, the surviving corporation shall assume the obligations of the Corporation under this Section 6.6 with respect to any proceeding arising out of or relating to any actions, transactions or facts occurring prior to the date of such merger or consolidation.

(h) Amendment or Repeal. Any repeal or modification of the foregoing provisions of this Section 6.6 shall not adversely affect any right or protection hereunder of any person in respect of any act or omission occurring prior to the time of such repeal or modification.

(i) Other Indemnification and Prepayment of Expenses. This Section 6.6 shall not limit the right of the Corporation, to the extent and in the manner permitted by law, to indemnify and to advance expenses to other persons when and as authorized by appropriate corporate action.

Section 6.7 Conflicts of Interest; Quorum. No contract or transaction between the Corporation and one or more of its officers or Directors, or between the Corporation and any other corporation, partnership, association or other organization, in which one or more of the Corporation's officers or Directors are officers or directors, or have a financial interest, shall be void or voidable solely for this reason, or solely because the Corporation's officer or Director is present at or participates in the meeting of the Board or committee which authorizes the contract or transaction, or solely because any such officer's or Director's votes are counted for such purpose, if (a) the material facts as to the officer's or Director's relationship or interest and as to the contract or transaction are disclosed or are known to the Board or the committee, and the Board or the committee in good faith authorizes the contract or transaction by a majority of the disinterested Directors, even though the disinterested Directors be less than a quorum; or (b) the contract or transaction is fair as to the Corporation as of the time it is authorized,



approved or ratified by the Board or a committee thereof. Interested Directors may be counted in determining the presence of a quorum at a meeting of the Board or a committee which authorizes the contract or transaction.

Section 6.8 Form of Records. Any records maintained by the Corporation in the regular course of its business, including its books of account and minute books, may be kept on, or by means of, or be in the form of, any information storage device or method, provided that the records so kept can be converted into clearly legible paper form within a reasonable time. The Corporation shall so convert any records so kept upon the request of any person entitled to inspect the same.

## ARTICLE VII

### Commercial Paper

Section 7.1 Checks; Drafts; Orders. All checks, drafts or orders for the payment of money shall be signed by such officer or officers (or agent or agents) as the Board from time to time may designate.

## ARTICLE VIII

### Amendments

Section 8.1 Amendments. Upon not less than three days notice (which notice may be waived by unanimous consent), these Bylaws may be amended, altered or repealed at any meeting of Members by the affirmative vote of a majority of all the Members, or they may be amended, altered, or repealed by the written consent of all the Members without a meeting. Upon not less than three days notice (which notice may be waived by unanimous consent), these Bylaws also may be amended, altered or repealed at any regular or special meeting of the Board by the affirmative vote of a majority of the entire Board, or they may be amended, altered, or repealed by the written consent of all of the Directors without a meeting. In either case, such notice shall be accompanied by a draft of the proposed change to the Bylaws; provided, however, that the Board, or Members, shall have the full power and authority to adopt different language from that contained in such draft, in amending, altering or repealing these Bylaws.

## ARTICLE IX

### Limited Purpose Funds

Section 9.1 General. The Corporation may receive, hold, administer and expend funds contributed or bequeathed to it for limited purposes which are within the scope of the objectives and purposes set forth in its Certificate, and shall use such funds exclusively for such purposes. The Corporation may enter into agreements setting forth the provisions applicable to such limited purpose funds, including provisions limiting the use of contributions (which term, for the purposes of this Article IX, shall include gifts,

grants, devises and bequests), in whole or in part, absolutely or conditionally, to specified states or other areas, exclusively, or for specified purposes, or otherwise limiting such use.

Section 9.2 Effect of Amendments. The obligations of the Corporation in connection with any contributions made in reliance on the provisions of this Article IX or any agreement shall not be released or altered by any amendment, alteration or repeal of this Article IX.

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

<b>Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).</b>	
<b>Type or print</b>  <small>File by the extended due date for filing the return See instructions.</small>	Name of Exempt Organization <b>Lumina Foundation for Education</b>
	Number, street, and room or suite number If a P.O. box, see instructions. <b>Lumina Foundation for Education 30 South Meridian Street, Suite 700</b>
	City, town or post office, state, and ZIP code For a foreign address, see instructions <b>INDIANAPOLIS, IN 46204</b>
	Employer identification number <b>351813228</b> <small>For IRS use only</small>

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

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

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

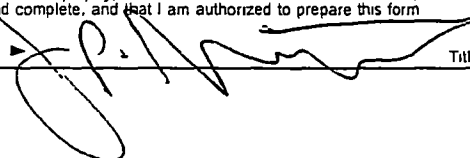
- The books are in care of **David A. Brown**  
Telephone No **317-951-5300** FAX No. **317-951-5454**
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . . . . . If this is for the whole group, check this box  If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

- I request an additional 3-month extension of time until **11/15**, 20 **10**.
- For calendar year **2009**, or other tax year beginning **20**, and ending **20**.
- If this tax year is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period
- State in detail why you need the extension. **Taxpayer respectfully requests additional time to gather information necessary to file a complete and accurate tax return.**

<b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions.	<b>8a</b> \$ <b>85,675.</b>
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	<b>8b</b> \$ <b>1,252,288.</b>
<b>c Balance Due.</b> Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instrs.	<b>8c</b> \$ <b>0.</b>

**Signature and Verification**

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

Signature  Title **President & CEO** Date **8/2/10**

## Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box  **X**
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

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

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

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

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

<b>Type or print</b>	Name of Exempt Organization <b>Lumina Foundation for Education</b>	Employer identification number <b>351813228</b>
File by the due date for filing your return See instructions.	Number, street, and room or suite number. If a P.O. box, see instructions. <b>30 S Meridian Street #700</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>Indianapolis, IN 46204</b>	

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

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

• The books are in the care of. ▶ David A. Brown

Telephone No. ▶ 317-951-5300 FAX No. ▶ 317-951-5454

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box. ▶ . If it is for part of the group, check this box. ▶  and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 2010, to file the exempt organization return for the organization named above.  
The extension is for the organization's return for:

- ▶  calendar year 2009 or
- ▶  tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions .....	<b>3a</b>	\$ 148,007.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit. ....	<b>3b</b>	\$ 1,252,288.
c <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions .....	<b>3c</b>	\$ 0.

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