

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

**2011**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 **2011**, or tax year beginning , **2011**, and ending

Lumina Foundation for Education  
30 S Meridian Street #700  
Indianapolis, IN 46204

**A** Employer identification number  
351813228**B** Telephone number (see the instructions)  
317-951-5300**C** If exemption application is pending, check here. ☐**D 1** Foreign organizations, check here. . . . . ☐**2** Foreign organizations meeting the 85% test, check here and attach computation . . . . . ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here . . . . . ☐**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here . . . . . ☐

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

**H** Check type of organization: ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, column (c), line 16)  
\$ 1082176421.

**J** Accounting method: ☐ Cash ☒ Accrual  
☐ 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 instructions).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>				
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 . . . . .				
4 Dividends and interest from securities . . . . .	23,016,198.	23,942,253.	23,942,253.	
5a Gross rents . . . . .				
b Net rental income or (loss) . . . . .				
6a Net gain/(loss) from sale of assets not on line 10.	63,044,118.			
b Gross sales price for all assets on line 6a . . . . .	548718000.			
7 Capital gain net income (from Part IV, line 2) . . . . .		40,375,899.		
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 Statement 1	16,610.	5,068,500.		
12 Total. Add lines 1 through 11 . . . . .	86,076,926.	69,386,652.	23,942,253.	
<b>ADMINISTRATIVE AND EXPENSES</b>				
13 Compensation of officers, directors, trustees, etc.	1,833,754.	238,023.		1,058,435.
14 Other employee salaries and wages . . . . .	3,862,222.	358,366.		3,450,637.
15 Pension plans, employee benefits . . . . .	4,994,133.	167,709.		2,583,101.
16a Legal fees (attach schedule) . . See. St. 2	256,777.	93,679.		120,876.
b Accounting fees (attach sch) . . See. St. 3	120,685.	4,611.		100,711.
c Other prof fees (attach sch) . . See. St. 4	11,904,370.	6,296,801.		5,083,502.
17 Interest . . . . .		178,730.		
18 Taxes (attach schedule)(see instrs) . . See. Stm. 5	555,966.	465,385.		
19 Depreciation (attach See Stmt 19 sch) and depletion . . . . .	632,314.	52,222.		
20 Occupancy . . . . .	616,223.	46,701.		564,583.
21 Travel, conferences, and meetings . . . . .	2,165,944.	20,628.		2,113,193.
22 Printing and publications . . . . .	750,877.	5,448.		759,112.
23 Other expenses (attach schedule) See Statement 6	1,076,544.	5,390,410.		901,898.
24 Total operating and administrative expenses. Add lines 13 through 23 . . . . .	28,769,809.	13,318,713.		16,736,048.
25 Contributions, gifts, grants paid Part. XV.	48,736,583.			47,614,822.
26 Total expenses and disbursements. Add lines 24 and 25 . . . . .	77,506,392.	13,318,713.	0.	64,350,870.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements . . . . .	8,570,534.			
b Net investment income (if negative, enter -0-) . . . . .		56,067,939.		
c Adjusted net income (if negative, enter -0-) . . . . .			23,942,253.	



Department of the Treasury  
Internal Revenue Service  
Ogden UT 84201

For assistance, call:  
1-877-829-5500

Notice Number: CP211A  
Date: June 11, 2012

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Taxpayer Identification Number:  
35-1813228  
Tax Form: 990PF  
Tax Period: December 31, 2011

LUMINA FOUNDATION FOR EDUCATION INC  
30 S MERIDIAN ST STE 700  
INDIANAPOLIS IN 46204-3568



053603

## APPLICATION FOR EXTENSION OF TIME TO FILE AN EXEMPT ORGANIZATION RETURN - APPROVED

We received and approved your Form 8868, Application for Extension of Time to File an Exempt Organization Return, for the return (form) and tax period identified above. Your extended due date to file your return is **August 15, 2012**.

When it's time to file your Form 990, 990-EZ, 990-PF or 1120-POL, you should consider filing electronically. Electronic filing is the fastest, easiest and most accurate way to file your return. For more information, visit the Charities and Nonprofit web at [www.irs.gov/eo](http://www.irs.gov/eo). This site will provide information about:

- The type of returns that can be filed electronically,
- approved e-File providers, and
- if you are required to file electronically.

If you have any questions, please call us at the number shown above, or you may write us at the address shown at the top of this letter.



Department of the Treasury  
Internal Revenue Service  
Ogden UT 84201

40204

IRS USE ONLY

351813228

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For assistance, call:  
1-877-829-5500

Notice Number: CP211A  
Date: September 17, 2012

Taxpayer Identification Number:  
35-1813228  
Tax Form: 990PF  
Tax Period: December 31, 2011

045110.108308.0160.004 1 AT 0.374 373



LUMINA FOUNDATION FOR EDUCATION INC  
30 S MERIDIAN ST STE 700  
INDIANAPOLIS IN 46204-3568

045110

## APPLICATION FOR EXTENSION OF TIME TO FILE AN EXEMPT ORGANIZATION RETURN - APPROVED

We received and approved your Form 8868, Application for Extension of Time to File an Exempt Organization Return, for the return (form) and tax period identified above. Your extended due date to file your return is **November 15, 2012**.

When it's time to file your Form 990, 990-EZ, 990-PF or 1120-POL, you should consider filing electronically. Electronic filing is the fastest, easiest and most accurate way to file your return. For more information, visit the Charities and Nonprofit web at [www.irs.gov/eo](http://www.irs.gov/eo). This site will provide information about:

- The type of returns that can be filed electronically,
- approved e-File providers, and
- if you are required to file electronically.

If you have any questions, please call us at the number shown above, or you may write us at the address shown at the top of this letter.

**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
<b>ASSETS</b>	1 Cash — non-interest-bearing .....			
	2 Savings and temporary cash investments .....	68,133,926.	59,437,443.	59,437,443.
	3 Accounts receivable .....	996,287.		
	Less: allowance for doubtful accounts .....	1,006,837.	996,287.	996,287.
	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 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 .....	905,665.	473,933.	473,933.
	10a Investments — U.S. and state government obligations (attach schedule) .....	83,567,005.		
	b Investments — corporate stock (attach schedule) .. Statement 7 .....	470,396,806.	514,183,384.	514,183,384.
	c Investments — corporate bonds (attach schedule) .. Statement 8 .....	80,809,836.	90,502,073.	90,502,073.
	<b>LIABILITIES</b>	11 Investments — land, buildings, and equipment: basis .....		
Less: accumulated depreciation (attach schedule) .....				
12 Investments — mortgage loans .....				
13 Investments — other (attach schedule) .. Statement 9 .....		449,626,625.	414,770,658.	414,770,658.
14 Land, buildings, and equipment: basis .....		6,170,175.		
Less: accumulated depreciation (attach schedule) .. See Stmt 10 .....		4,357,532.	2,393,404.	1,812,643.
15 Other assets (describe .....				
16 <b>Total assets</b> (to be completed by all filers — see the instructions. Also, see page 1, item I) .....		1,156,840,104.	1,082,176,421.	1,082,176,421.
17 Accounts payable and accrued expenses .....		4,399,022.	6,272,208.	
18 Grants payable .....		25,851,428.	28,707,968.	
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) .....	30,250,450.	34,980,176.		
<b>NET ASSETS OR FUND BALANCES</b>	<b>Foundations that follow SFAS 117, check here</b> .....	<input checked="" type="checkbox"/>		
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted .....	1,126,589,654.	1,047,196,245.	
	25 Temporarily restricted .....			
	26 Permanently restricted .....			
	<b>Foundations that do not follow SFAS 117, check here</b> .....	<input type="checkbox"/>		
	<b>and complete lines 27 through 31.</b>			
	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 instructions) .....	1,126,589,654.	1,047,196,245.		
31 <b>Total liabilities and net assets/fund balances</b> (see instructions) .....	1,156,840,104.	1,082,176,421.		

**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	1,126,589,654.
2 Enter amount from Part I, line 27a .....	2	8,570,534.
3 Other increases not included in line 2 (itemize) .....	3	
4 Add lines 1, 2, and 3 .....	4	1,135,160,188.
5 Decreases not included in line 2 (itemize) .. See Statement 11 .....	5	87,963,943.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30 .....	6	1,047,196,245.



**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)
1 a				
b				
c	See Stmt 20			
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			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(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	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss). [ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 ]	2	40,375,899.
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 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))
2010	62,717,768.	1,075,680,578.	0.058305
2009	63,859,935.	1,009,983,344.	0.063229
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

2 Total of line 1, column (d)	2	0.262784
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	0.052557
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	1,116,053,056.
5 Multiply line 4 by line 3	5	58,656,400.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	560,679.
7 Add lines 5 and 6	7	59,217,079.
8 Enter qualifying distributions from Part XII, line 4	8	64,719,051.

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 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 instrs)			
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	560,679.
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	560,679.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	560,679.
6 Credits/Payments:			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a	1,089,122.	
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	2,456.	
7 Total credits and payments. Add lines 6a through 6d.	7	1,091,578.	
8 Enter any penalty 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	530,899.	
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax 530,899. Refunded	11	0.	

**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)?		X
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.		
c Did the foundation file Form 1120-POL 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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes.		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 Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		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? If 'Yes,' complete Part II, column (c), and Part XV.	X	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions). DE IN		
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 General Instruction G? If 'No,' attach explanation.	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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If 'Yes,' complete Part XIV.		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.		X

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Form 990-PF (2011)

**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 21	11	X	
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions).....	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?.... Website address..... ▶ WWW.Luminafoundation.org	13	X	
14	The books are in care of ▶ David A. Brown Telephone no. ▶ 317-951-5300 Located at ▶ 30 S. Meridian Street ZIP + 4 ▶ 46204			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here..... N/A ▶ and enter the amount of tax-exempt interest received or accrued during the year..... ▶ 15 N/A			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?.....	16		X
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country ▶				

**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
1a 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 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 instructions)?.....	1b	X
Organizations relying on a current notice regarding disaster assistance check here..... ▶ <input type="checkbox"/>		
c 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 2011?.....	1c	X
2 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)):		
a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011?..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years ▶ 20__ , 20__ , 20__ , 20__ .		
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 instructions.).....	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20__ , 20__ , 20__ , 20__ .		
3a 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 If 'Yes,' did it have excess business holdings in 2011 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 2011.).....	3b	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?.....	4a	X
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 2011?.....	4b	X

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Form 990-PF (2011)



**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)?

5b

X

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 22 ☒ 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 ☒ Nob Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

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

6b

X

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? N/A

7b

**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	1,833,754.	550,480.	6,925.

**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	40	813,052.	364,927.	7,438.

Total number of other employees paid over \$50,000. ☐ 8



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

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'</b>		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
See Statement # 15		
		4,615,971.
<b>Total number of others receiving over \$50,000 for professional services</b>		<b>35</b>

**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	
	2,868,404.
2 Research and Publications Statement # 16	
	1,792,753.
3 Philanthropy Statement # 16	
	358,551.
4 Technical Assistance Statement 16	
	2,151,303.

**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	
<b>Total. Add lines 1 through 3</b>	<b>0.</b>

BAA

Form 990-PF (2011)

**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	1,080,293,307.
b	Average of monthly cash balances	1b	51,719,202.
c	Fair market value of all other assets (see instructions)	1c	1,036,279.
d	Total (add lines 1a, b, and c)	1d	1,133,048,788.
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	0.
3	Subtract line 2 from line 1d	3	1,133,048,788.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	16,995,732.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,116,053,056.
6	Minimum investment return. Enter 5% of line 5	6	55,802,653.

**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	55,802,653.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	560,679.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	560,679.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	55,241,974.
4	Recoveries of amounts treated as qualifying distributions	4	1,887,734.
5	Add lines 3 and 4	5	57,129,708.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	57,129,708.

**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	64,350,870.
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	368,181.
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	64,719,051.
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	560,679.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	64,158,372.

**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 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7.....				57,129,708.
2 Undistributed income, if any, as of the end of 2011:				
a Enter amount for 2010 only.....			23,726,487.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006.....				
b From 2007.....				
c From 2008.....				
d From 2009.....				
e From 2010.....				
f Total of lines 3a through e.....	0.			
4 Qualifying distributions for 2011 from Part XII, line 4: ▶ \$ 64,719,051.				
a Applied to 2010, but not more than line 2a..			23,726,487.	
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 2011 distributable amount.....				40,992,564.
e Remaining amount distributed out of corpus.....	0.			
5 Excess distributions carryover applied to 2011..... (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 2010. Subtract line 4a from line 2a. Taxable amount — see instructions.....			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012.....				16,137,144.
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 2006 not applied on line 5 or line 7 (see instructions).	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.....	0.			
10 Analysis of line 9:				
a Excess from 2007.....				
b Excess from 2008.....				
c Excess from 2009.....				
d Excess from 2010.....				
e Excess from 2011.....				

BAA

Form 990-PF (2011)

**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 2011, enter the date of the ruling. . . . .						
b Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)						
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 . . . . .	Tax year	Prior 3 years			(e) Total	
	(a) 2011	(b) 2010	(c) 2009	(d) 2008		
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 12

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
<b>a</b> Paid during the year See Statement 17 				47,614,822.
<b>b</b> Approved for future payment See Statement 18 				28,707,968.
<b>Total</b> .....			▶ <b>3a</b>	47,614,822.
<b>Total</b> .....			▶ <b>3b</b>	28,707,968.





**Underpayment of Estimated Tax by Corporations**Department of the Treasury  
Internal Revenue Service▶ See separate instructions.  
▶ Attach to the corporation's tax return.**2011**

Name **Lumina Foundation for Education** Employer identification number **351813228**

**Note:** Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

**Part I Required Annual Payment**

1	Total tax (see instructions) .....	1	560,679.
2a	Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 .....	2a	
2b	Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method .....	2b	
2c	Credit for federal tax paid on fuels (see instructions) .....	2c	
2d	<b>Total.</b> Add lines 2a through 2c. ....	2d	
3	Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty .....	3	560,679.
4	Enter the tax shown on the corporation's 2010 income tax return (see instructions). <b>Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5.</b> .....	4	410,878.
5	<b>Required annual payment.</b> Enter the <b>smaller</b> of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 .....	5	410,878.

**Part II Reasons for Filing** — Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty (see instructions).

- 6 ☐ The corporation is using the adjusted seasonal installment method.
- 7 ☐ The corporation is using the annualized income installment method.
- 8 ☒ The corporation is a 'large corporation' figuring its first required installment based on the prior year's tax.

**Part III Figuring the Underpayment**

	(a)	(b)	(c)	(d)	
9 <b>Installment due dates.</b> Enter in columns (a) through (d) the 15th day of the 4th ( <b>Form 990-PF filers:</b> Use 5th month), 6th, 9th, and 12th months of the corporation's tax year. ....	9	5/15/11	6/15/11	9/15/11	12/15/11
10 <b>Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Schedule A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% of line 5 above in each column. ....	10	102,720.	177,620.	140,170.	140,170.
11 <b>Estimated tax paid or credited for each period</b> (see instructions). For column (a) only, enter the amount from line 11 on line 15. ....	11	339,122.		500,000.	250,000.
<b>Complete lines 12 through 18 of one column before going to the next column.</b>					
12 Enter amount, if any, from line 18 of the preceding column .....	12		236,402.	58,782.	418,612.
13 Add lines 11 and 12 .....	13		236,402.	558,782.	668,612.
14 Add amounts on lines 16 and 17 of the preceding column .....	14				
15 Subtract line 14 from line 13. If zero or less, enter -0- .....	15	339,122.	236,402.	558,782.	668,612.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0- .....	16		0.	0.	
17 <b>Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 .....	17				
18 <b>Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column. ....	18	236,402.	58,782.	418,612.	

Go to **Part IV** on page 2 to figure the penalty. Do not go to **Part IV** if there are no entries on line 17 — no penalty is owed.



**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
<b>19</b> Enter the date of payment or the 15th day of the 3rd month after the close of the tax year, whichever is earlier (see instructions). (Form 990-PF and Form 990-T filers: Use 5th month instead of 3rd month.)....	<b>19</b>			
<b>20</b> Number of days from due date of installment on line 9 to the date shown on line 19.....	<b>20</b>			
<b>21</b> Number of days on line 20 after 4/15/2011 and before 7/1/2011.....	<b>21</b>			
<b>22</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 21}}{365}$ $\times$ 4%...	<b>22</b>			
<b>23</b> Number of days on line 20 after 6/30/2011 and before 10/1/2011.....	<b>23</b>			
<b>24</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 23}}{365}$ $\times$ 4%...	<b>24</b>			
<b>25</b> Number of days on line 20 after 9/30/2011 and before 1/1/2012.....	<b>25</b>			
<b>26</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 25}}{365}$ $\times$ 3%...	<b>26</b>			
<b>27</b> Number of days on line 20 after 12/31/2011 and before 4/1/2012.....	<b>27</b>			
<b>28</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 27}}{366}$ $\times$ 3%...	<b>28</b>			
<b>29</b> Number of days on line 20 after 3/31/2012 and before 7/1/2011.....	<b>29</b>			
<b>30</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 29}}{366}$ $\times$ ____ %...	<b>30</b>			
<b>31</b> Number of days on line 20 after 6/30/2012 and before 10/1/2012.....	<b>31</b>			
<b>32</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 31}}{366}$ $\times$ ____ %...	<b>32</b>			
<b>33</b> Number of days on line 20 after 9/30/2012 and before 1/1/2013.....	<b>33</b>			
<b>34</b> Underpayment on line 17 $\frac{\text{Number of days on line 33}}{366} \times$ ____ %...	<b>34</b>			
<b>35</b> Number of days on line 20 after 12/31/2012 and before 2/16/2013.....	<b>35</b>			
<b>36</b> Underpayment on line 17 $\frac{\text{Number of days on line 35}}{365} \times$ ____ %...	<b>36</b>			
<b>37</b> Add lines 22, 24, 26, 28, 30, 32, 34, and 36.....	<b>37</b>			
<b>38</b> <b>Penalty.</b> Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 33; or the comparable line for other income tax returns.....	<b>38</b>			0.

\*Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-4933 to get interest rate information.

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

**December 31, 2011**

**Tax ID 35-1813228**

**Form 990 PF**

**Other Income**

**Statement Number 1**

**Part 1 Line 11**

	(A) Revenue Per Books	(B) Net Investment Income	(c) Adjusted Net Income
Miscellaneous Income	\$ 16,610	\$ 16,610	
Miscellaneous from Tax Letters		78,122	
Total of Other Income listed on K-1s		4,973,768	
Total		<u>\$ 5,068,500</u>	

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

**December 31, 2011**

**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)
	\$ 256,777	\$ 93,679	\$	\$ 120,876
Legal Fees	\$ 256,777	\$ 93,679	\$ -	\$ 120,876

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

**December 31, 2011**

**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)
	\$ 120,685	\$ 4,611	\$ -	\$ 100,711
Accounting Fees	\$ 120,685	\$ 4,611	\$ -	\$ 100,711



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

**December 31, 2011**

**Tax ID 35-1813228**

**Form 990 PF**

**Other Professional**

**Statement Number 4**

**Part 1**

**Line 16c**

	(A)	(B)	(C)	(D)
Description	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Publication Research Projects (Consulting for Research, Editing and Publishing)	\$ 765,972	\$	\$ 0	\$ 795,898
Investment Managers, Brokerage, Custodian and Investment Consulting	7,019,845	6,296,801	0	-
Consulting on Employee Development, Benefits & Compensation	5,250	-	0	9,210
Software (consulting for development, enhancements and maintenance)	304,359		0	327,142
Grant Evaluations	488,702	-		519,563
Grant Program Development	2,960,303			3,038,123
General Consulting	359,939		0	393,566
Total	\$ <u>11,904,370</u>	\$ <u>6,296,801</u>	\$ <u>0</u>	\$ <u>5,083,502</u>

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

**December 31, 2011**

**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	\$ 780,470	\$ 0	\$ 0	0
Deferred Excise Taxes	(224,504)	0	0	0
Foreign Taxes paid on Tax Letter	0	74,764	0	0
Foreign Taxes paid on K-1s	0	390,621	0	0
Total Taxes	<u>\$ 555,966</u>	<u>\$ 465,385</u>	<u>\$ 0</u>	<u>0</u>

**Lumina Foundation For Education****Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Other Expenses****Statement Number 6****Part 1****Line 23**

Description	(A)	(B)	(C)	(D)
	Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Insurance Expense	\$ 105,631	\$ 18,325	\$ 0	\$ 85,202
Employee Recruiting	24,921	51	0	24,865
Equipment Maintenance	291,311	77,405	0	205,018
Seminars & Training	84,441	8,291	0	75,198
Dues	258,081	6,618	0	250,703
Sponsorships	107,991	293	0	107,664
Subscriptions and office supplies	50,985	3,115	0	47,512
Miscellaneous	107,320	0	0	105,736
Amortization of Computer Software	45,863		0	0
Expenses on K-1s		5,276,312	0	0
Total Other Expenses	<u>\$ 1,076,544</u>	<u>\$ 5,390,410</u>	<u>\$ 0</u>	<u>\$ 901,898</u>

**Lumina Foundation For Education****Tax ID 35-1813228****Tax Return for Year Ending****December 31, 2011****Form 990 PF****Investments****Statements Number****7, 8 & 9****Part II Lines 10, 12, and 13**

		Beginning of year		End of Year
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Line 10a	U. S. & state government obligations	\$ 83,567,005	\$ -	\$ -
Line 10b	Corporate Stocks	470,396,806	514,183,384	514,183,384
Line 10c	Corporate Bonds	80,809,836	90,502,073	90,502,073
Line 12	Mortgage Loans	0	0	0
Line 13	Other	449,626,625	414,770,658	414,770,658
		<u>\$ 1,084,400,272</u>	<u>\$ 1,019,456,115</u>	<u>\$ 1,019,456,115</u>



<b>Lumina Foundation For Education</b>		<b>Tax ID 35-1813228</b>
<b>Tax Return for Year Ending</b>	<b>December 31, 2011</b>	
<b>Form 990 PF</b>		<b>Statement Number 10</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	\$ 3,693,596	\$ 3,751,790		\$ 3,751,790
Accumulated Depreciation	(2,291,730)	(2,680,379)		(2,680,379)
Furniture and Equipment	2,379,040	2,418,384		2,418,384
Accumulated Depreciation	(1,387,502)	(1,677,152)		(1,677,152)
Net Improvements, Furniture and Equipment	\$ 2,393,404	\$ 1,812,643		\$ 1,812,643

Lumina Foundation For Education		Tax ID 35-1813228	
Tax Return for Year Ending		December 31, 2011	
Form 990 PF		Statement Number	11
Part III	Line 3 and 5	Increases/Decreases on part of income	

Net Unrealized Investment Loss	\$	87,963,943
Net Unrealized Investment Loss	\$	<u>87,963,943</u>

<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, 2011</b>	
<b>Supplementary Information</b>		<b>Statement Number</b>	<b>12</b>
<b>Part XV Line 2</b>	<b>Guidelines for Grant Seekers</b>		

Lumina Foundation welcomes LOIs year-round from eligible organizations seeking funds for work that fits within Lumina's mission and guidelines. Generally we review unsolicited inquiries through the end of September. Inquiries submitted after September may be held for consideration until the following year.

Organizations may submit more than one inquiry at any one time.

An LOI should describe the proposed work in three to five pages, using the questions below 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 high-quality 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 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 attachment 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 send grant inquiries via mail to:

Program Office—"New Inquiry"

Lumina Foundation for Education

P.O. Box 1806

Indianapolis, IN 46206-1806

### **The review process**

An internal review panel carefully reviews every LOI that meets foundation guidelines. 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 request additional information and to provide instructions on applying for a grant. 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.

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	2	27,000	0
Norris Darrell Jr., Esq.	Director	0	6,250	0
James C. Lintzenich	Director	2	30,500	0
Marie V. McDemmond	Director	2	38,500	0
John M. Mutz	Director	2	29,000	0
J. Bonnie Newman	Director	2	29,500	0
Michael L. Smith	Director	2	30,000	0
Frank D. Alvarez	Director	2	30,000	0
Laura Palmer Noone	Director	1	26,500	0
Belle Wheelan	Director	2	23,500	0
Mark Yudof	Director	2	25,500	0
F. Joseph Loughrey	Director	1	23,500	0
<b>Subtotal for Directors</b>		<u>319,750</u>	<u>0</u>	<u>0</u>
<b>Officers</b>				
Jamie P. Merisotis	President & CEO	40+	559,113	98,753
J. David Maas	Vice-President, Treasurer & CFO	40+	247,362	140,438
Juan Suarez	Vice-President - External Affairs	40+	211,233	75,447
James Applegate	Vice-President - Program Development	40+	240,064	116,495
Holiday McKiernan	President, Secretary, and General Counsel	40+	256,233	119,348
		<u>1,514,004</u>	<u>550,480</u>	<u>6,925</u>
<b>Totals for Directors and Officers</b>		<u>1,833,754</u>	<u>550,480</u>	<u>6,925</u>
		See Note 4	See Note 5	See Note 6

Part VIII

Information About Officers, Directors, Trustees

Statement Number

13

Line 1

Officers and Directors

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. Darrell retired April 2011 (after attending meetings in January - April)

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 (\$72,960) and officer contributions for 401(k) and 457 plans (\$151,500)

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 2011, the assets decreased 6.48 percent (after payment of grant and operational expenses) from \$1.2 billion to \$1.1 billion. Investment earnings supported the grants payout of \$47.7 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.



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

December 31, 2011

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, Information Technology	40	129,493	43,192	1,600
Sam Cargile Note (3)	Vice-President for Grantmaking	40	176,408	103,991	2,388
Eileen Scott	Director, Investments	40	194,441	87,427	1,600
Elizabeth Gutierrez	Director, State Policy	40	133,545	33,724	1,600
Dewayne A. Matthews Note (3)	Vice-President for Policy and Strategy	40	179,165	96,594	250
			813,052	364,927	7,438

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 (\$1,500.00 ) and miscellaneous taxable and non-taxable payments.

3) Lumina has Vice-President positions that are not an officer of the corporation.

Lumina Foundation For Education  
Form 990 PF

Tax ID 35-1813228

Tax Return for Year Ending

December 31, 2011

Part VIII

Information About Officers, Directors, Trustees  
Highly Paid Staff and Contractors

Statement Number 15

Line 3

Contractors

(a) Name and address	(b) Type of Service	(c) Compensation
CornerStone Partners, LLC 675 Peter Jefferson Parkway, Suite 160 Charlottesville, VA 22911	Investment consulting (contracted Chief Investment Officer functions)	\$ 1,979,449
MDC, Inc 307 Main Street Durham, NC 27701	Program Expansion	1,300,000
Highclere International Investments 253 Bayberry Lane Westport, CT 06880	Investment Manager	562,761
Sanderson Investments 250 South Wacker Drive, Suite 220 Chicago, IL 60606	Investment Manager	393,182
Northern Trust Company 50 S. LaSalle Street Chicago, IL 60603	Custodial and investment reporting	380,579
		<hr/>
		<hr/> <b>4,615,971</b> <hr/>

Lumina Foundation For Education		Tax ID 35-1813228	
Form 990 PF			
Part IX - A	Tax Return for Year Ending Summary of Direct Charitable Activities	December 31, 2011 Statement Number	16
Line 1	Direct Charitable Activities		

### Description

#### Direct Charitable Activities

The mission of Lumina Foundation is to expand access and success in education beyond high school, particularly among adults, first-generation college students, low-income students, and students of color. This mission is directed toward a single, overarching Big Goal – to increase the percentage of Americans with high-quality degrees and credentials by the year 2025. This goal is a national priority for several reasons.

Higher education is a prerequisite to success in a knowledge-based society and economy.

The social and economic opportunities facing our country can best be addressed by educating many more people beyond high school. As we attain the goal, we improve the economy, strengthen civic engagement and reduce the costs of crime, poverty and health care and, in short, improve the human condition.

Higher education attainment rates among adults, first-generation college-going students, low-income students and students of color are significantly lower than those of other students. This gap has endured for decades and is now widening. This attainment gap is alarming given the country's demographic trends and economic needs.

The Foundation carries out several direct charitable programs in support of this mission. These include the following:

Lumina Foundation For Education

Tax ID 35-1813228

Form 990 PF

Part IX - A Tax Return for Year Ending  
Summary of Direct Charitable Activities

December 31, 2011  
Statement Number 16

Line 1

Direct Charitable Activities

Description

Conferences and Convenings. The Foundation convenes groups of higher education leaders, policy makers, researchers, and others who are actively involved in the effort to expand access and success in higher education, particularly to hard-to-reach populations including adults who originally chose not to pursue higher education after high school, first generation students, low-income students, and students of color. These convenings are focused on bringing together key stakeholders on a specific topic with the objective being both to share information and to develop actionable, measurable next steps. The topics range from ways to overcome barriers to higher education to effective strategies to increase the rate of persistence and graduation among students who enroll in college. The Foundation disseminates the results of these convenings on its website to leverage the knowledge gained for the benefit of others. In 2011 the Foundation held 41 convenings; 28 at the Foundation's offices, 7 off site, but in Indianapolis, and 6 out-of-state. The location of the convening is based on the topic and the participants. The total number of individuals participating in Foundation convenings was 1,797 with the average convening size being 44 participants. In addition to this convening strategy, the Foundation also actively seeks opportunities to share with external audiences the urgency of the need to increase degree attainment. Superficially, Foundation executives also participate actively in conferences on these subjects in the US and abroad. During 2011 the CEO made more than 50 keynote speeches and the Foundation executives and staff participated in more than 85 conferences to share Lumina's knowledge with other attendees. \$ 2,868,404

Research and Publications. The Foundation conducts substantial research on issues affecting access and success in higher education and makes such research widely available at no charge. For example, in 2011, the Foundation released the second edition of its seminal report "A stronger nation through higher education: how and why Americans must achieve a "big goal" for college attainment." This report offers a compelling case for the need to increase dramatically the higher education attainment rates, as a state-by-state analysis of the education level of residents, showing the work that must be done to accomplish the attainment goal of 60%. Based on the research and analysis of "A Stronger Nation", Lumina released policy briefs for each state that addressed the issues and challenges of each state in reaching the 60% attainment goal. In addition to "A Stronger Nation", during 2011, the Foundation released two issues of "Focus" - this is a publication that highlights a significant issue in higher education. The research and publication work is essential to the Foundation's efforts to build public will around the issues of higher education access and attainment - to move key stakeholders, and the broader public, beyond mere awareness of these issues to action based on the urgency the issues. 1,792,753

Lumina Foundation For Education  
Form 990 PF

Tax ID 35-1813228

Part IX - A      Tax Return for Year Ending  
Summary of Direct Charitable Activities

December 31, 2011  
Statement Number      16

Line 1      Direct Charitable Activities

Description

Philanthropy. The Foundation is actively engaged in supporting the philanthropic sector in general, as well as higher education. Foundation executives are active with philanthropic organizations in the Indianapolis community, where the Foundation is headquartered, as well as with national and international philanthropic organizations that focus on the need to increase access to higher education, as well as retention and ultimately completion of degree programs. Foundation executives and staff members also serve on the boards of local and national boards. 358,551

Technical Assistance. The Foundation provides technical assistance to other stakeholders working in the field of higher education, as well as to policy makers who are tasked with developing solutions to improve access and success in higher education. Foundation executives and staff regularly provide technical advice and assistance to about critical issues such as the state of access to higher education, the range of programs that have been initiated to increase such access and to enhance the likelihood of success. This includes providing briefings and/or testimony at the request of policy makers on matters within its expertise. The Foundation uses nonpartisan research and analysis to provide background on the wide array of issues impacting higher education. In the case of legislative committee or subcommittee sessions, the Foundation provides testimony only upon written request of the chair of the applicable committee or subcommittee, and ensures that its testimony is available to all committee or subcommittee members. 2,151,303

\$ 7,171,011

Lumina Foundation For Education		Tax Return for Year Ending	Tax ID 35-1813228 December 31, 2011
Form 990 PF Part XV	Line 3 a	Grants and Contributions Paid during the Year	Statement Number 17

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).

Purpose of grant or contribution	Amount
See the attached Annual Report Financial Information for Grant detail by Theme.	\$ 45,778,585
See the attached Annual Report Financial Information for Special Programs	1,836,237

Grand Total Grants Disbursed	<u>\$ 47,614,822</u>
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**Lumina Foundation For Education**  
**Tax Return for Year Ending**

**Tax ID 35-1813228**

**December 31, 2011**

**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 - 2010 Grants by Theme for detail and purpose  
(attached to statement for Grants Paid)

\$ 28,940,450

See Annual Report Financial Information Special Programs - 2010 for detail and purpose  
(attached to statement for Grants Paid)

5,750

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

(238,232)

**Net Grants payable per books**

**\$ 28,707,968**



# Annual Report Financial Information - 2011 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	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0
To increase opportunities for low-income, first-generation and minority students to earn college credits in high school.								
5444 STD Central Indiana Community Foundation 615 North Alabama Street Room 119 Indianapolis, IN 46204	\$1,020,000	\$0	\$520,000	\$0	\$0	\$0	\$0	\$500,000
To create the College Readiness Fund, a funding collaborative to improve and expand college access in Marion County.								
5793 STD National Academy of Sciences 500 Fifth Street, Northwest, 11th Floor Washington, DC 20001	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0
To develop improved measures of productivity within U.S. higher education.								
5897 STD Possibility Project, The 104 West 27th Street, 12th Floor New York, NY 10001	\$22,000	\$0	\$22,000	\$0	\$0	\$0	\$0	\$0
To research, document and disseminate the key factors for City at Peace's success in advancing high school graduation and college enrollment.								
Attainment/Retention	Total for Access	\$1,642,000	\$0	\$1,142,000	\$0	\$0	\$0	\$500,000
5498 STD American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To build policy analysis capacity at the organization to advance the objectives of the Achieving the Dream initiative at the national level.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention								
5730 STD Board of Trustees of the University of Illinois, The 1901 South First Street Suite A Champaign, IL 61820-7406	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
To facilitate the dissemination and adoption of best practices in the assessment of college learning outcomes.								
5928 STD Indiana Housing and Community Development Authority 30 South Meridian Street Suite 1000 Indianapolis, IN 46204	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
To improve college access and success rates for parents of Twenty-first Century Scholars and their dependents.								
5517 STD National Center for Educational Accountability 4030-2 West Braker Lane, Suite 200 Austin, TX 78759 Transferred to Grant# 7328 - ACT, Inc. To build state capacity to share data across educational sectors.	\$200,000	\$0	\$0	\$200,000	\$0	\$0	\$0	\$0
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.	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Attainment/Retention								
5084 STD	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
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.								
Total for Attainment/Retention								
Civic Engagement Budget	\$1,025,000	\$0	\$825,000	\$200,000	\$0	\$0	\$0	\$0
7687 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Calvert Social Investment Foundation								
7315 Wisconsin Avenue								
Bethesda, MD 20814								
To support NRCF's planned sunset, helping the organization finalize work, including the completion and disseminate its end of project reports, sharing lessons and recommendations from its ten-year work.								
5887 STD	\$75,000	\$0	\$75,000	\$0	\$0	\$0	\$0	\$0
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.								
7495 STD	\$0	\$16,750	\$16,750	\$0	\$0	\$0	\$0	\$0
Grantmakers for Education								
720 SW Washington Street, Suite 605								
Portland, OR 97205								
To develop and produce a "Funders Guide on Developmental Education."								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Civic Engagement Budget								
7451 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Philanthropic Research, Inc. 1730 Pennsylvania Avenue, Northwest Suite 250 Washington, DC 20006								
To support continued free public services, such as the Exchange Program, and institute new technology upgrades.								
Total for Civic Engagement Budget	\$75,000	\$36,750	\$111,750	\$0	\$0	\$0	\$0	\$0
Opportunity Fund Budget								
7006 STD	\$70,000	\$0	\$0	\$0	\$0	\$0	\$0	\$70,000
CEOs for Cities NFP 177 North State Street, Suite 500 Chicago, IL 60601								
To expand the reach, elevate the message and support urban leaders to move from insight to action on the Talent Dividend.								
6959 STD	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
Council for Adult and Experiential Learning 55 East Monroe Suite 1930 Chicago, IL 60603								
To implement a pilot for a virtual Prior Learning Assessment Center.								
7003 STD	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
Manufacturing Institute, The 1331 Pennsylvania Avenue, Northwest Suite 600 Washington, DC 20004								
To support Indiana joining the NAM-Endorsed Manufacturing Skills Certification System.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7080 STD Manufacturing Institute, The 1331 Pennsylvania Avenue, Northwest Suite 600 Washington, DC 20004	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To accelerate efforts to align educational pathways with the NAM-Endorsed Manufacturing Skills Certification System in 12 states.								
7112 STD National League of Cities Institute 1301 Pennsylvania Avenue Northwest Washington, DC 20004	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To disseminate information on how cities can advance a postsecondary success agenda, use learning strategies to connect leading-edge cities with one another and provide technical assistance.								
7083 STD Research Foundation of State University of New York, The Sponsored Programs Office 22 Corporate Woods, 3rd Floor, SUNY Plaza Albany, NY 12246	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To partner with regional business and industry leaders to create a statewide cooperative education model to help SUNY students complete their degrees.								
7494 STD American Association of State Colleges and Universities 1307 New York Avenue, NW Fifth Floor Washington, DC 20005-4701	\$0	\$414,900	\$364,900	\$0	\$0	\$0	\$0	\$50,000
To explore use of the Degree Qualifications Profile to measure and improve student learning at four-year comprehensive institutions.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
6782 STD	\$45,000	\$0	\$45,000	\$0	\$0	\$0	\$0	\$0
American Legislative Exchange Council 1101 Vermont Avenue, Northwest 11th Floor Washington, DC 20005								
To help state legislators explore policy options intended to increase student success and productivity within American higher education.								
7306 STD	\$0	\$1,000,000	\$500,000	\$0	\$0	\$0	\$0	\$500,000
Aspen Institute, The One Dupont Circle, Northwest Suite 700 Washington, DC 20036-1133								
To support the design and launch of the Aspen Prize for Community College Excellence.								
7454 STD	\$0	\$250,000	\$250,000	\$0	\$0	\$0	\$0	\$0
Aspen Institute, The One Dupont Circle, Northwest Suite 700 Washington, DC 20036-1133								
To develop and strengthen relationships between community colleges and employers so that education and training is more aligned to the labor market needs.								
7628 STD	\$0	\$486,000	\$400,000	\$0	\$0	\$0	\$0	\$86,000
Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790								
To assist states and systems in developing and implementing policies with potential to help educate many more students.								
7028 STD	\$55,000	\$0	\$55,000	\$0	\$0	\$0	\$0	\$0
Brookings Institution, The 1775 Massachusetts Ave., N.W. Washington, DC 20036-2188								
To improve public-institution and state financial aid policies by making them more effective for low-income students.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7402 STD Campaign for College Opportunity 900 Wilshire Boulevard, Suite 924 Los Angeles, CA 90017	\$0	\$350,000	\$350,000	\$0	\$0	\$0	\$0	\$0
To improve college access and success in California's community colleges and universities by setting goals and priorities for increased educational attainment and implementation of new student transfer rules among public colleges and universities.								
6971 STD Carnegie Foundation for the Advancement of Teaching, The 51 Vista Lane Stanford, CA 94305-8703	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To support the creation, implementation and continuous improvement of two new mathematical pathways, Mathway and Statway, to address the high failure rate of developmental mathematics students, particularly in community colleges.								
7171 STD Center of Workforce Innovation, Inc., The 2804 Boilemmaker Court, Suite E Valparaiso, IN 46383	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
To develop a scalable model for an accelerated dual credit project to increase college attainment for more students.								
7864 STD Central Indiana Corporate Partnership Foundation 111 Monument Circle, Suite 1800 Indianapolis, IN 46204	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
To support the development of an Advanced Manufacturing and Logistics (AML) curriculum.								
7469 STD Association of American Colleges and Universities 1818 R Street, Northwest Washington, DC 20009	\$0	\$2,195,100	\$2,000,000	\$0	\$0	\$0	\$0	\$195,100
To assess the Degree Qualifications Profile competencies in the context of student transfer.								



# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7417 STD Editorial Projects in Education 6935 Arlington Road, Suite 100 Bethesda, MD 20814	\$0	\$475,000	\$375,000	\$0	\$0	\$0	\$0	\$100,000
To provide news coverage of K-16 education alignment issues.								
7347 STD Education Sector, The 1201 Connecticut Avenue, Northwest Suite 850 Washington, DC 20036	\$0	\$600,000	\$500,000	\$0	\$0	\$0	\$0	\$100,000
To explore, research and promote adoption of innovative public policy and practice around how higher education is organized and delivered to graduate greater numbers of 21st century students.								
7108 STD Education Trust, Inc., The 1250 H Street Northwest Suite 700 Washington, DC 20005-5935	\$387,400	\$0	\$387,400	\$0	\$0	\$0	\$0	\$0
To support the next phase of the Access to Success initiative and to advance the higher education advocacy of The Education Trust.								
7404 STD Education Writers Association One Dupont Circle Suite 818 Washington, DC 20036	\$0	\$420,000	\$320,000	\$0	\$0	\$0	\$0	\$100,000
To educate and train a national community of journalists covering higher education issues critical to achieving the Big Goal in an effort to build public will for change.								
6662 STD Excelencia in Education, Inc. 1717 N Street, Northwest 2nd Floor Washington, DC 20036	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To advance policy and engagement strategies to accelerate Latino college degree completion.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7320 STD	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
Foundation for California Community Colleges 1102 Q Street, Suite 3500 Sacramento, CA 95811								
To support the Student Success and Completion Task Force.								
7319 STD	\$0	\$1,446,900	\$746,900	\$0	\$0	\$0	\$0	\$700,000
Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036								
To expand the What We Know online research resource and Institute Policy-to-Research Summits to facilitate the application of research for policymaking around the college completion agenda.								
7613 STD	\$0	\$149,400	\$149,400	\$0	\$0	\$0	\$0	\$0
Links Foundation, Incorporated, The 1200 Massachusetts Avenue Northwest Washington, DC 20005								
To increase the number of community college students who transfer to and graduate from Historically Black Colleges and Universities.								
6915 STD	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
Minnesota Public Radio dba American Public Media 480 Cedar Street St. Paul, MN 55101								
To examine critical higher education issues related to the kind of education Americans will need for the 21st Century in public radio- and Web-based documentaries and shorter newsmagazine stories and podcasts.								
6860 STD	\$116,900	\$0	\$58,450	\$0	\$0	\$0	\$0	\$58,450
National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251								
To support the improvement of data resources for higher education stakeholders and contribute to the college completion agenda.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
7376 STD	\$0	\$442,200	\$342,000	\$0	\$0	\$0	\$0	\$100,200
National Conference of State Legislatures 7700 East First Place Denver, CO 80230-7143								
To support state legislators in the design and implementation of policies that increase degree attainment with available resources while preserving access and quality.								
7312 STD	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
New America Foundation 1899 L Street NW Fourth Floor Washington, DC 20036								
To create a Postsecondary National Policy Institute for congressional staff.								
7143 STD	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
Rockefeller Philanthropy Advisors, Inc. 6 West 48th Street, 10th Floor New York, NY 10036								
To establish an independent Citizen's Commission in California to recommend statewide postsecondary education attainment goals and strategies to achieve them.								
7690 STD	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
Southern University System Foundation, The P.O. Box 2468 Baton Rouge, LA 70821								
To increase the number of African American Males with bachelor degrees.								
7395 STD	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
Teachers College of Columbia University 525 West 120th Street Box 127 New York, NY 10027								
To produce and broker in-depth national and regional education coverage that builds public will for increasing degree attainment by focusing on issues that are underreported by mainstream news organizations.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Opportunity Fund Budget								
6929 STD	\$300,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$100,000
Tennessee Board of Regents 1415 Murfreesboro Road, Suite 350 Nashville, TN 37217-2833								
To increase completion rates for sub-baccalaureate programs in Tennessee while building enrollment and expanding the scope and scale of these programs.								
6309 STD	\$150,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$50,000
Trustees of the University of Pennsylvania Office of Research Services 3451 Walnut Street Room P-221 Philadelphia, PA 19104								
To highlight models of success at Minority Serving Institutions that illustrate institutional commitment to educating students from low-income, underrepresented groups and increasing national rates of degree attainment.								
7364 STD	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
United Negro College Fund, Inc. 8260 Willow Oaks Corporate Drive PO Box 10444 Fairfax, VA 22031-8044								
To support strategic planning to improve the operation and performance of the United Negro College Fund.								
7381 STD	\$0	\$358,000	\$358,000	\$0	\$0	\$0	\$0	\$0
University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620								
To promote and build awareness and understanding of GOAL 2025 in Florida through periodic public radio news stories on issues and activities that will reach more than 1 million weekly listeners.								
Total for Opportunity Fund Budget	\$2,874,300	\$9,737,500	\$9,502,050	\$0	\$0	\$0	\$0	\$3,109,750

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7221 STD	\$399,400	\$0	\$200,000	\$0	\$0	\$0	\$0	\$199,400
Achieve, Inc. 1400 16th Street NW, Suite 510 Washington, DC 20036								
To support the engagement of higher education in the development and use of college and career readiness assessments tied to the Common Core State Standards.								
7357 STD	\$0	\$212,000	\$162,000	\$0	\$0	\$0	\$0	\$50,000
American Association of State Colleges and Universities 1307 New York Avenue, NW Fifth Floor Washington, DC 20005-4701								
To support the work of the College Readiness Partnership between the American Association of State Colleges and Universities, Council of Chief State School Officers and State Higher Education Executive Officers.								
7609 STD	\$0	\$200,000	\$150,000	\$0	\$0	\$0	\$0	\$50,000
America's Promise Alliance 1110 Vermont Avenue Suite 900 Washington, DC 20005								
To support the Grad Nation Summit and the Grad Nation Action Collaborative.								
7617 STD	\$0	\$200,000	\$150,000	\$0	\$0	\$0	\$0	\$50,000
Brookings Institution, The 1775 Massachusetts Ave., N.W. Washington, DC 20036-2188								
To investigate the costs of state assessments including the costs associated with adopting Common Core Assessments by states.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7588 STD	\$0	\$355,000	\$305,000	\$0	\$0	\$0	\$0	\$50,000
Center for Law and Social Policy 1200 18th Street, Northwest Suite 200 Washington, DC 20036								
To gain a better understanding of the interaction between financial aid and benefit programs, and identifying policy opportunities at both the state and federal levels.								
7591 STD	\$0	\$1,500,000	\$1,200,000	\$0	\$0	\$0	\$0	\$300,000
Center for Law and Social Policy 1200 18th Street, Northwest Suite 200 Washington, DC 20036								
To serve as intermediary for a three-year initiative to test operational and financing models for integrating benefits access services in community colleges.								
7120 STD	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
Center on Education Policy 1001 Connecticut Avenue, NW Suite 522 Washington, DC 20036								
To determine how exit examinations affect students' opportunities to receive a high school diploma and experience success in education beyond high school.								
7622 STD	\$0	\$73,000	\$73,000	\$0	\$0	\$0	\$0	\$0
College Entrance Examination Board, The 45 Columbus Avenue New York, NY 10023-6917								
To research reform of the federal Pell Grant Program to ensure sustainable and adequate need-based funding.								
5980 STD	\$1,000,000	\$0	\$1,000,000	\$0	\$0	\$0	\$0	\$0
National Council of the Young Men's Christian Associations of the USA 101 North Wacker Drive Chicago, IL 60606								
To manage, expand and integrate the College Goal SundaySM program into the national YMCA movement.								



## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7659 STD	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
Council for Opportunity in Education Lawrence Building Roehampton University Roehampton Lane London, SW 15 5PJ UNITED KINGDOM								
To plan the first in a series of Student and World Congresses on international student access to higher education.								
7586 STD	\$0	\$300,000	\$250,000	\$0	\$0	\$0	\$0	\$50,000
Council of Chief State School Officers One Massachusetts Avenue, NW Suite 700 Washington, DC 20001-1431								
To secure staff/consultant capacity for the Smarter Balanced Assessment Consortium to develop strategies and activities to engage higher education institutions and leaders in the Consortium's member states.								
7476 STD	\$0	\$56,800	\$56,800	\$0	\$0	\$0	\$0	\$0
Education Trust, Inc., The 1250 H Street Northwest Suite 700 Washington, DC 20005-5935								
To organize and conduct an annual college application week to increase the number of first generation and low-income students that apply for admission and enroll in a postsecondary education certificate or degree program.								
7089 STD	\$75,000	\$0	\$37,500	\$0	\$0	\$0	\$0	\$37,500
Indiana Association of United Ways 3901 North Meridian Street, Suite 306 Indianapolis, IN 46208								
To integrate college access training and KnowHow2Go concepts into after school and out of school time programs.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7203 STD Institute for College Access and Success, The 405 14th Street, 11th Floor Oakland, CA 94612	\$0	\$350,000	\$220,000	\$0	\$0	\$0	\$0	\$130,000
To support the Institute for College Access and Success.								
5952 STD Academy for Educational Development 1825 Connecticut Avenue, NW Washington, DC 20009-5721	\$606,800	\$0	\$0	\$606,800	\$0	\$0	\$0	\$0
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.								
5934 STD Advertising Council, Inc. 815 Second Avenue/42nd Street Ninth Floor New York, NY 10017-4503	\$278,600	\$0	\$278,600	\$0	\$0	\$0	\$0	\$0
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	\$768,300	\$0	\$768,300	\$0	\$0	\$0	\$0	\$0
To support in 2009-2011 the KnowHow2GO ground and air campaigns with national and local outreach and communication activities.								
7636 STD American Council on Education One Dupont Circle, NW Washington, DC 20036-1193	\$0	\$55,000	\$55,000	\$0	\$0	\$0	\$0	\$0
To fund the development and distribution of additional KnowHow2Go communications materials.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6899 STD Association of Independent Kentucky Colleges and Universities 484 Chenault Road Frankfort, KY 40601	\$70,000	\$0	\$70,000	\$0	\$0	\$0	\$0	\$0
To implement the final phase of KnowHow2Go campaign in Kentucky.								
6778 STD College Success Foundation 1605 NW Sammamish Road Suite 200 Issaquah, WA 98027	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To ensure that all students, particularly low-income, first-generation college-going, minority and youth with special needs view themselves as college worthy and college ready.								
7663 STD College Success Foundation 1605 NW Sammamish Road Suite 200 Issaquah, WA 98027	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To build capacity and long-term sustainability of the college access system in Washington State.								
6781 STD Community Partners 1000 North Alameda Street Suite 240 Los Angeles, CA 90012	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To execute Phase II of the KnowHow2GO campaign in Southern California.								
7676 STD Community Partners 1000 North Alameda Street Suite 240 Los Angeles, CA 90012	\$0	\$82,200	\$82,200	\$0	\$0	\$0	\$0	\$0
To advance Southern California College Access Network's vision, broaden its impact, and ensure the sustainability by engaging strategic stakeholders in the work.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7671 STD EducationQuest Foundation, Inc. P. O. Box 82505 Lincoln, NE 68501	\$0	\$95,800	\$95,800	\$0	\$0	\$0	\$0	\$0
To support the development and sustainability of the Panhandle P-16 Initiative regional access network.								
6724 STD Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To fully implement the final phase of the KnowHow2GO campaign in Illinois.								
7668 STD Illinois Student Assistance Commission 1755 Lake Cook Road Deerfield, IL 60015	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To build the statewide coalition and network capacity to engage policymakers, practitioners, and the public in pursuing and achieving Goal 2025.								
7669 STD Imagine Fund, The 222 North Chestnut Street Suite 200 Lansing, MI 48933	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
To support the development of six Local College Access Networks that demonstrate collective community impact based on the Strive civic infrastructure framework.								
6908 STD Indiana Commission for Higher Education 101 West Ohio Street, Suite 550 Indianapolis, IN 46204-4254	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To help students in Indiana access and complete postsecondary education.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7104 STD National College Access Network, Inc. 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036	\$32,000	\$0	\$32,000	\$0	\$0	\$0	\$0	\$0
To provide technical assistance in network-building to nine KnowHow2GO states.								
7388 STD National College Access Network, Inc. 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036	\$0	\$777,900	\$777,900	\$0	\$0	\$0	\$0	\$0
To provide technical support and resources for the KnowHow2GO states.								
6346 STD New England Educational Opportunity Association University of Maine EOC & TS Chadbourne Hall Room 318 Orono, ME 04469-5713	\$46,600	\$0	\$46,600	\$0	\$0	\$0	\$0	\$0
To develop a sustainable college access network in Connecticut that will support advocacy and policy.								
6745 STD Ohio College Access Network 41 South High Street Suite 1650 Columbus, OH 43215	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
To fund strategic planning, implementation of that plan and regnants for local programs that will elevate Ohio's ranking in degree attainment across the United States.								
7674 STD Student Assistance Foundation of Montana 2500 Broadway Helena, MT 59601	\$0	\$98,800	\$98,800	\$0	\$0	\$0	\$0	\$0
To establish the network management systems and policies needed to achieve long-term sustainability and Goal 2025.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
6343 STD	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
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.								
6747 STD	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620								
To expand the KnowHow2GO program to selected parts of Florida to create a collaborative statewide network to promote policy development.								
6949 STD	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620								
To develop a targeted outreach campaign to serve, engage and incorporate Haitian American communities of South Florida as an integral part of the KnowHow2GO Florida ground, media and network development campaign.								
7675 STD	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$0
University of South Florida Board of Trustees, a public body corporate 4202 East Fowler Avenue SVC 2054 Tampa, FL 33620								
To enhance and maintain the sustainability of the Florida College Access Network.								
6564 STD	\$290,000	\$0	\$290,000	\$0	\$0	\$0	\$0	\$0
What Kids Can Do, Inc. P. O. Box 603252 Providence, RI 02906								
To manage Lumina's three-year initiative to link national youth-serving organizations to the KnowHow2GO campaign.								



## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7589 STD	\$0	\$250,000	\$200,000	\$0	\$0	\$0	\$0	\$50,000
Mind Trust, Inc., The 1630 North Meridian Street, Suite 330 Indianapolis, IN 46202								
To support the Education Entrepreneur Fellowship program for innovative leaders in education.								
7361 STD	\$0	\$47,500	\$47,500	\$0	\$0	\$0	\$0	\$0
National Center for Higher Education Management Systems 3035 Center Green Drive Suite 150 Boulder, CO 80301-2251								
To assist Lumina Foundation, the Partnership for Assessment and Readiness for College and Career, and the Smarter/balanced Assessment Consortia implement their common agenda in ensuring meaningful higher education involvement in the two K-12 assessment consortia.								
7637 STD	\$0	\$250,900	\$250,900	\$0	\$0	\$0	\$0	\$0
National Council of the Young Men's Christian Associations of the USA 101 North Wacker Drive Chicago, IL 60606								
To support the integration of college access and success within the Y-USA's continuum of educational achievement programs and activities.								
7726 STD	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790								
To conceptualize one or more interactive mobile phone applications and youth-generated media that connect first-generation students with information about preparing for college that directly engages them in the process.								
7749 STD	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
College Forward P.O. Box 142308 Austin, TX 78714								
To plan for the development of a new prototype of a financial aid information system that engages students.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7813 STD Education Policy Improvement Center 720 East 13th Avenue, Suite 203 Eugene, OR 97401	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
To design, prototype, and test a Transition Management System to help students navigate all levels of the transition into an Open Enrollment Institution.								
7814 STD EduGuide 321 North Pine Street Lansing, MI 48933	\$0	\$155,000	\$100,000	\$0	\$0	\$0	\$0	\$55,000
To provide an online and mobile platform that enables college access programs to multiply their reach, contact hours, manpower and collaborative impact in a measurable and scalable way.								
7745 STD iMentor 30 Broad Street 9th Floor New York, NY 10004	\$0	\$200,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
To see students across the country paired with mentors who can provide the support they need to graduate from high school, enroll in college, and be successful in today's workforce.								
7819 STD San Francisco Education Plan 1550 Bryant Street, Suite 650 San Francisco, CA 94103	\$0	\$150,900	\$100,000	\$0	\$0	\$0	\$0	\$50,900
To provide all San Francisco public high school students with online access to an interactive college and career platform.								
7489 STD North Carolina Center for Public Policy Research P.O. Box 430 West Hargett St., Suite 701 Raleigh, NC 27602	\$0	\$245,300	\$145,000	\$0	\$0	\$0	\$0	\$100,300
To support policy research and recommendations on issues of college affordability, financial aid and college completion in North Carolina.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Preparation Budget								
7699 STD Rochefeller Philanthropy Advisors, Inc. 6 West 48th Street, 10th Floor New York, NY 10036	\$0	\$1,560,000	\$575,000	\$0	\$0	\$0	\$0	\$985,000
To support state-level K-12 and postsecondary collaboration and alignment on the design and implementation of the Common Core State Standards and assessments.								
7359 STD United Way Worldwide 701 North Fairfax Street Alexandria, VA 22314	\$0	\$250,000	\$250,000	\$0	\$0	\$0	\$0	\$0
To support a planning grant that develops a national United Way network model for student supports and success.								
7429 STD University of Chicago, The 5801 South Ellis Avenue Chicago, IL 60637	\$0	\$34,700	\$34,700	\$0	\$0	\$0	\$0	\$0
To review the literature on the role of psycho-social skills and academic behaviors in shaping performance in middle grades, in high school and in the transition to college.								
Productivity Budget	Total for Preparation Budget	\$4,416,700	\$8,600,800	\$9,852,600	\$606,800	\$0	\$0	\$2,558,100
6477 STD Carnegie Mellon University 5000 Forbes Avenue Pittsburgh, PA 15213		\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0
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.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
7340 STD Council of Independent Colleges One Dupont Circle, NW Suite 320 Washington, DC 20036-1110	\$0	\$425,000	\$325,000	\$0	\$0	\$0	\$0	\$100,000
To explore the applicability and usefulness of the Degree Qualifications Profile on independent college campuses.								
7323 STD Higher Learning Commission of the North Central Association 230 South LaSalle Street, Suite 7-500 Chicago, IL 60604	\$0	\$425,000	\$325,000	\$0	\$0	\$0	\$0	\$100,000
To explore the applicability and usefulness of the Degree Qualifications Profile through the Open Pathways accreditation affirmation process.								
7335 STD Western Association of Schools & Colleges 985 Atlantic Avenue, Suite 100 Alameda, CA 94501	\$0	\$1,500,000	\$800,000	\$0	\$0	\$0	\$0	\$700,000
To transform WASC's accreditation process to assure clearer standards for graduation rates, levels of learning and degree outcomes using the Degree Profile.								
6672 STD Education Conservancy, The 805 Southwest Broadway Suite 1600 Portland, OR 97205	\$100,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$0
Based on an understanding of the needs of students and the proclivities of institutions, Ed Conservancy seeks to 1) improve consumer search and navigation of college information and 2) establish standards for determining relevant, publicly available information and for encouraging the requisite institutional participation.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
7230 STD Center for American Progress 1333 H Street Northwest, 10th Floor Washington, DC 20005	\$190,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$90,000
To create a public policy framework for U.S. higher education that draws upon emerging lessons from service-industry science and strengthens the voice of students as consumers.								
7100 STD Excelsior College 7 Columbia Circle Albany, NY 12203	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To explore the potential for a voluntary, interstate agreement to broaden the availability of accredited online degree programs by reducing regulatory barriers while ensuring strong consumer safeguards.								
7365 STD Institute for the Study of Knowledge Management in Education 323 Harvard Avenue Haft Moon Bay, CA 94019	\$0	\$750,000	\$650,000	\$0	\$0	\$0	\$0	\$100,000
To improve, manage and draw lessons from an online network for knowledge sharing among higher education leaders and policymakers from Productivity Strategy Lab states.								
6460 STD Investigative Reporters and Editors, Inc. Missouri School of Journalism 141 Neff Annex Columbia, MO 65211	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To increase campus coverage of college completion and productivity issues by training student journalists to report on these topics.								
6305 STD Mills College 5000 MacArthur Boulevard Oakland, CA 94613-1301	\$52,000	\$0	\$52,000	\$0	\$0	\$0	\$0	\$0
To advance the understanding of higher education costs and suggest ways to reduce the cost of producing high-quality degrees.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant/Returns	Transfers	End Balance
Productivity Budget								
6593 STD	\$398,100	\$0	\$398,100	\$0	\$0	\$0	\$0	\$0
Public Agenda Foundation, The								
6 East 39th Street								
Ninth Floor								
New York, NY 10016-0112								
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.								
7355 STD	\$0	\$1,100,000	\$900,000	\$0	\$0	\$0	\$0	\$200,000
Public Agenda Foundation, The								
6 East 39th Street								
Ninth Floor								
New York, NY 10016-0112								
To increase Public Agenda's capacity to support state-level and institutional Productivity Grant efforts in five additional states.								
6638 STD	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
Social Science Research Council, The								
One Pierrepont Plaza, Suite 1								
Brooklyn, NY 11201								
To promote affordable and accessible learning opportunities through technological innovations.								
7346 STD	\$0	\$599,600	\$399,600	\$0	\$0	\$0	\$0	\$200,000
Teachers College of Columbia University								
Box 174								
525 West 120th Street								
439 Thorndike Hall								
New York, NY 10027-6696								
To examine the implementation and effects of performance funding in three states among various types of public colleges and universities.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget 7160 STD Tides Center, The P.O. Box 29907 1014 Torrey Avenue San Francisco, CA 94129		\$0	\$2,608,000	\$1,500,000	\$0	\$0	\$0	\$1,108,000
To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on restructuring costs of administrative and academic services to expand capacity to educate college students.								
7161 STD Tides Center, The P.O. Box 29907 1014 Torrey Avenue San Francisco, CA 94129		\$0	\$2,445,100	\$1,500,000	\$0	\$0	\$0	\$945,100
To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on restructuring costs of administrative and academic services to expand capacity to educate college students.								
7162 STD Tides Center, The P.O. Box 29907 1014 Torrey Avenue San Francisco, CA 94129		\$0	\$3,096,900	\$1,500,000	\$0	\$0	\$0	\$1,596,900
To support Lumina Foundation's multi-state, multi-year Productivity Grant initiative by managing contracts with states focused on incentivizing college completion to encourage graduation of many more Americans with high-quality degrees and credentials.								
6327 STD Western Governors University 4001 South 700 East Suite 700 Salt Lake City, UT 84107-2533	\$400,000	\$0	\$400,000		\$0	\$0	\$0	\$0
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 - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
7297 STD	\$0	\$2,800,000	\$1,000,000	\$0	\$0	\$0	\$0	\$1,800,000
Social Program Evaluators & Consultants 615 Griswold Street Suite 1505 Detroit, MI 48226-3992								
To evaluate Lumina Foundation's higher education productivity work.								
7461 STD	\$0	\$817,200	\$767,200	\$0	\$0	\$0	\$0	\$50,000
American Historical Association 400 A St. SE Washington, DC 20003								
To apply the Tuning process to the discipline of History.								
7401 STD	\$0	\$184,700	\$184,700	\$0	\$0	\$0	\$0	\$0
Institute for Evidence-Based Change, The 2236 Encinitas Boulevard, Suite G Encinitas, CA 92024								
To develop and pilot an evaluation for Tuning USA.								
7397 STD	\$0	\$415,000	\$315,000	\$0	\$0	\$0	\$0	\$100,000
Midwestern Higher Education Compact 1300 South Second Street Suite 130 Minneapolis, MN 55454-1079								
To apply lessons learned from single-state Tuning initiatives to a regional level.								
7396 STD	\$0	\$390,000	\$250,000	\$0	\$0	\$0	\$0	\$140,000
Utah Board of Regents Board of Regents Building The Gateway 60 South 400 West Salt Lake City, UT 84101-1284								
To expand Tuning in the Utah System of Higher Education.								
Total for Productivity Budget	\$1,590,100	\$17,556,500	\$11,916,600	\$0	\$0	\$0	\$0	\$7,230,000

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
5698 STD	\$2,000,250	\$0	\$2,000,250	\$0	\$0	\$0	\$0	\$0
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.								
7386 STD	\$0	\$2,000,000	\$800,000	\$0	\$0	\$0	\$0	\$1,200,000
Achieving the Dream, Inc. 8455 Colesville Road, Suite 900 Silver Spring, MD 20910								
To support attainment of degrees and credentials by community college students nationally through Achieving the Dream, Inc.								
7328 STD	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
ACT, Inc. 500 ACT Drive P.O. Box 168 Iowa City, IA 52245								
Transferred from Grant# 5517 - National Center for Educational Accountability								
To build state capacity to share data across educational sectors.								
7075 STD	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
American Association of Community Colleges One Dupont Circle, NW Suite 410 Washington, DC 20036								
To build on programs with proven success to help credential 40 percent of adult learners to enhance employment opportunities in high-demand fields.								
7066 STD	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
Board of Control for Southern Regional Education, The 592 Tenth Street, Northwest Atlanta, GA 30318-5790								
To establish a regional, and then national portal to provide returning adult learners with the information, resources and services to assist in completing degrees.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7071 STD Board of Regents of the University of Wisconsin System 1738 Van Hise Hall 1220 Linden Drive Madison, WI 53706-1559	\$350,000	\$0	\$0	\$0	\$0	\$0	\$0	\$350,000
To develop a system-wide approach that expands existing Prior Learning Assessment (PLA) activities.								
7419 STD Council for Adult and Experiential Learning 55 East Monroe Suite 1930 Chicago, IL 60603	\$0	\$400,000	\$400,000	\$0	\$0	\$0	\$0	\$0
To increase awareness and usage of LearningCounts.org through marketing and communications support.								
7478 STD Goodwill Industries International, Inc. 15810 Indiana Drive Rockville, MD 20855	\$0	\$550,000	\$400,000	\$0	\$0	\$0	\$0	\$150,000
To expand Goodwill's Community College Career Collaboration Project.								
7064 STD Greater Louisville Foundation 614 West Main Street, Suite 6000 Louisville, KY 40202	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To create a model employee degree completion delivery system in the Greater Louisville region.								
7013 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036	\$200,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$100,000
To support the expansion of Project Win-Win, helping institutions to award associate degrees to students who have earned them.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7491 STD Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036	\$0	\$449,400	\$449,400	\$0	\$0	\$0	\$0	\$0
To support the expansion of Project Win-Win, helping institutions to award associate degrees to students who have earned them.								
7068 STD Ivy Tech Foundation 50 West Fall Creek Parkway North Drive Indianapolis, IN 46208	\$434,200	\$0	\$0	\$0	\$0	\$0	\$0	\$434,200
To re-enroll former students who left Ivy Tech College with at least 45 credits and help them complete their associate degrees and go on to pursue baccalaureate programs at the regional campuses of Indiana University.								
7074 STD Jobs for the Future, Inc. 88 Broad Street Eighth Floor Boston, MA 02110	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To advance a state policy framework in three states to increase adult completion rates in community college occupational/technical credential programs.								
7067 STD Minnesota State Colleges and Universities Foundation Wells Fargo Place 30 Seventh Street East, Suite 350 St. Paul, MN 55101	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To strengthen the RAPID Completion Program.								
7073 STD Philadelphia Workforce Investment Board 1601 Market Street, Suite 1500 Philadelphia, PA 19103	\$450,000	\$0	\$0	\$0	\$0	\$0	\$0	\$450,000
To expand the Graduate! model and replicate it in at least three more regions.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7057 STD Rutgers University Foundation Office of Corporate and Foundation Relations Winants Hall, 7 College Avenue New Brunswick, NJ 08901	\$449,700	\$0	\$0	\$0	\$0	\$0	\$0	\$449,700
To help adults with some degree credits finish their degrees online through the state workforce development system								
7070 STD West Virginia Higher Education Policy Commission 1018 Kanawha Boulevard East, Suite 700 Charleston, WV 25301	\$448,400	\$0	\$0	\$0	\$0	\$0	\$0	\$448,400
To create a statewide program to increase associate and bachelor degree completion among adults with prior college credits.								
7202 STD Western Interstate Commission for Higher Education 3035 Center Green Drive Suite 200 Boulder, CO 80301-2204	\$700,000	\$0	\$100,000	\$0	\$0	\$0	\$0	\$600,000
To serve as intermediary organization for Lumina's Adult Degree Completion program to provide a mechanism for effective networking, communication, and dissemination.								
7458 STD American Institutes for Research 1000 Thomas Jefferson Street, NW Washington, DC 20007	\$0	\$500,000	\$450,000	\$0	\$0	\$0	\$0	\$50,000
To increase public access to measures of the labor market success of college graduates by program and by campus.								
7486 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
To increase the number of foster youth who complete high school and pursue higher education.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant/Returns	Transfers	End Balance
Success Budget								
7393 STD Center for American Progress 1333 H Street Northwest, 10th Floor Washington, DC 20005	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
To inform students and the public at large on issues of higher education and to promote positive policy outcomes pertaining to student access and success.								
6480 STD Complete College America, Inc. 25 East Pine Street Zionsville, IN 46077	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To support the creation and mission of the National Consortium on College Completion.								
7325 STD Complete College America, Inc. 25 East Pine Street Zionsville, IN 46077	\$0	\$200,000	\$200,000	\$0	\$0	\$0	\$0	\$0
To provide technical assistance to state consortia to assist in the development of strong Community College and Career Training Grant (C3TG) applications.								
7485 STD Education Commission of the States 700 Broadway, Suite 810 Denver, CO 80203	\$0	\$500,000	\$500,000	\$0	\$0	\$0	\$0	\$0
To move the states from information sharing and networking to the adoption of proven statewide remedial education policy and practice reforms.								
6006 STD Georgetown University 37th & O Streets, Northwest Box 571168 Washington, DC 20057	\$515,535	\$0	\$515,535	\$0	\$0	\$0	\$0	\$0
To conduct and disseminate research on the relationship between higher education and the economy, including projecting the supply and demand for college-educated workers.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6932 STD	\$30,000	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0
Indiana Community Action Association, Inc. 1845 West 18th Street Indianapolis, IN 46202								
To examine the definition, role, and policy barriers for certificates in IN and nationally, including eligibility for financial aid and utility in obtaining additional academic credentials.								
6597 STD	\$310,600	\$0	\$310,600	\$0	\$0	\$0	\$0	\$0
Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036								
To strengthen access and success through research, policy and improved practice.								
6267 STD	\$540,000	\$0	\$400,000	\$0	\$0	\$0	\$0	\$140,000
Ivy Tech Foundation 50 West Fall Creek Parkway, North Drive Indianapolis, IN 46208-5752								
To increase attainment rates of at-risk youth through an Accelerated Associate Degree Program.								
7542 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Armstrong Atlantic State University Foundation, Inc. 11935 Abercorn Street Savannah, GA 31419-1997								
To double the number of Hispanic and Latino Students attending college from Southeast Georgia.								
7553 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Hispanic Federation, Inc. 55 Exchange Place 5th floor New York, NY 10005								
To increase the academic success and graduation rates of Latino students in targeted CUNY colleges.								

## Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7547 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Hispanics in Philanthropy 55 Second Street Suite 1500 San Francisco, CA 94105								
To increase postsecondary access and success rates for Latinos.								
7512 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Kentucky Community and Technical College System 470 Cooper Drive Lexington, KY 40506								
To increase the number of Latino students earning high quality postsecondary degrees and credentials by engaging in culturally relevant college access and success efforts for students and families in Lexington and Louisville communities in Kentucky.								
7581 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Long Beach Community College District 4901 E. Carson Street Long Beach, CA 90808								
To provide support for the Promise Pathway, a Latino Student Success Program.								
7551 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Maricopa County Community College District 1202 W. Thomas Rd. Phoenix, AZ 85013								
To support efforts by Phoenix College to increase the number of Latino students earning high quality postsecondary degrees and credentials by strengthening seamless pathways to college and tracking educational and career success of high need youth in the greater Phoenix metropolitan area of Arizona.								
7577 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Miami Dade College 300 Northeast Second Avenue Miami, FL 33132								
To increase Latino degree and credential attainment and close the achievement gap.								



# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7550 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Rancho Santiago Community College District 1530 West 17th Street Santa Ana, CA 92706								
To increase the number of Latino students earning high quality postsecondary degrees and credentials by creating guaranteed admissions pathways for students in Santa Ana, California.								
7517 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Regents of the University of New Mexico MSC01 1247 1University of New Mexico Albuquerque, NM 87131								
To increase the number of Latino students earning high quality postsecondary degrees and credentials by expanding support services and seamless transitions from high school to college for students in Albuquerque and surrounding communities in New Mexico.								
7558 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
San Antonio Education Fund 131 El Paso Street San Antonio, TX 78204								
To increase the number of Latino students earning high quality postsecondary degrees and credentials by expanding financial aid programs and seamless college transitions for students in San Antonio and surrounding counties in Texas.								
7501 STD	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
Southwest Texas Junior College 2401 Garner Field Road Uvalde, TX 78801								
To increase the number of first-generation low-income Latino students achieving college success.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7563 STD Tennessee Higher Education Commission 404 James Robertson Parkway Suite 1900 Nashville, TN 37243	\$0	\$600,000	\$50,000	\$0	\$0	\$0	\$0	\$550,000
To expand Tennessee's College Mentor Corps to Memphis to serve Latino high school and community college students with college preparation, access and success services.								
7394 STD Mobilizing Americas Youth, Inc. 1875 K Street, Northwest 5th Floor Washington, DC 20006	\$0	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0
To improve educational attainment rates for community college students.								
6465 STD American Indian Higher Education Consortium 121 Oronoco Street Alexandria, VA 22314	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
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	\$195,800	\$0	\$195,800	\$0	\$0	\$0	\$0	\$0
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	\$300,000	\$0	\$300,000	\$0	\$0	\$0	\$0	\$0
To provide support to the MSI-Models of Success Program.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7239 STD	\$150,000	\$0	\$0	\$0	\$0	\$0	\$0	\$150,000
Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036								
To provide support to the MSI-Models of Success Program by adding a communications firm to support grantee communications efforts.								
7487 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Institute for Higher Education Policy 1320 19th Street, Northwest Suite 400 Washington, DC 20036								
To provide support to the MSI-Models of Success Program.								
6461 STD	\$187,000	\$0	\$187,000	\$0	\$0	\$0	\$0	\$0
Jackson State College Development Foundation, Inc. P.O. Box 17144 Jackson, MS 39217								
To create a multi-state, peer-learning network to ensure postsecondary success for minority students.								
6412 STD	\$198,800	\$0	\$198,800	\$0	\$0	\$0	\$0	\$0
Salish Kootenai College, Inc. Box 70 Pablo, MT 59855								
To identify factors that improve the postsecondary retention and success of American Indian students enrolled in developmental studies courses.								
6378 STD	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
Southern Education Foundation, Inc. 135 Auburn Avenue, Northeast Second Floor Atlanta, GA 30303								
To enhance student learning outcomes assessment, documentation and use at Historically Black Colleges and Universities and Hispanic Serving Institutions.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
6400 STD University Corporation at Monterey Bay 100 Campus Center Seaside, CA 93955-8001	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
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	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
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 Kelly Hall 7th floor El Paso, TX 79968	\$200,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$0
To identify the institutional structures at minority-serving institutions that foster student success and increase the effectiveness of transfer programs across the state.								
6787 STD Urban Institute, The 2100 M Street, Northwest Washington, DC 20037	\$199,800	\$0	\$0	\$199,800	\$0	\$0	\$0	\$0
To conduct a multi-year process and summative evaluation of Lumina's MSI- Models of Success Program.								
7468 STD National Skills Coalition 1730 Rhode Island Northwest, Suite 712 Washington, DC 20036	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
To develop and launch a new national Workforce Data Quality Campaign.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7498 STD National Student Clearinghouse 2300 Dulles Station Boulevard Suite 300 Herndon, VA 20171	\$0	\$544,300	\$500,000	\$0	\$0	\$0	\$0	\$44,300
To enhance student level data to better track postsecondary education outcomes, and concurrent enrollments.								
6260 STD Organisation for Economic Cooperation and Development 2, rue Andre-Pascal F -75775 Paris Cedix, 16 FRANCE	\$250,000	\$0	\$250,000	\$0	\$0	\$0	\$0	\$0
To assess the feasibility of cross-national comparisons of higher education learning outcomes.								
6531 STD Scholarship America 1550 American Boulevard East Suite 155 Minneapolis, MN 55425-1197	\$50,000	\$0	\$50,000	\$0	\$0	\$0	\$0	\$0
To build the capacity of Scholarship America to operate the Dreamkeepers program.								
7208 STD Institute for Evidence-Based Change, The 2236 Encinitas Boulevard, Suite G Encinitas, CA 92024	\$275,000	\$0	\$200,000	\$0	\$0	\$0	\$0	\$75,000
To assist in the facilitation, management and expansion of Tuning USA.								
7209 STD Kentucky Council on Postsecondary Education 1024 Capital Center Drive Suite 320 Frankfort, KY 40601	\$25,000	\$0	\$25,000	\$0	\$0	\$0	\$0	\$0
To participate in Tuning USA.								

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Success Budget								
7370 STD	\$0	\$450,000	\$400,000	\$0	\$0	\$0	\$0	\$50,000
University of Texas at Austin, The								
3316 Grandview								
Austin, TX 78705								
To identify and promote high-impact practices in community colleges.								
Total for Success Budget	\$11,710,085	\$13,408,700	\$11,377,385	\$199,800	\$0	\$0	\$0	\$13,541,600
Total for Standard Grants	\$23,333,185	\$49,340,250	\$44,727,385	\$1,006,600	\$0	\$0	\$0	\$26,939,450

# Annual Report Financial Information - 2011 Grants

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Productivity Budget								
6925 STD	\$200,000	\$0	\$0	\$0	\$0	\$0	\$0	\$200,000
CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036								
To develop communications activities and products that strengthen the ability of states to graduate more students within existing resources while maintaining academic quality.								
7043 STD	\$2,502,200	\$0	\$776,200	\$0	\$0	\$0	\$0	\$1,726,000
HCM Strategists, LLC 1156 15th Street, Northwest Suite 610 Washington, DC 20005								
To manage state contracts and coordinate technical support for Lumina's productivity initiative.								
Total for Productivity Budget	\$2,702,200	\$0	\$776,200	\$0	\$0	\$0	\$0	\$1,926,000
Success Budget								
7457 STD	\$0	\$350,000	\$275,000	\$0	\$0	\$0	\$0	\$75,000
Mathematica Policy Research 600 Maryland Avenue, Southwest Suite 550 Washington, DC 20024								
To continue the process and summative evaluation of Lumina's Minority Serving Institutions- Models of Success (MSI-MS) program.								
Total for Success Budget	\$0	\$350,000	\$275,000	\$0	\$0	\$0	\$0	\$75,000
Total for Expenditure Responsibility Grants	\$2,702,200	\$350,000	\$1,051,200	\$0	\$0	\$0	\$0	\$2,001,000
Grand Total	\$26,035,385	\$49,690,250	\$45,778,585	\$1,006,600	\$0	\$0	\$0	\$28,940,450

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Directors' Designation								
1002430 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221								
To support the American Indian College Fund.								
1002812 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304								
To provide for the Freshman Merit Scholarship.								
1002795 STD	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
Butler University 4600 Sunset Avenue Indianapolis, IN 46208								
To provide support for general support.								
1002897 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Butler University 4600 Sunset Avenue Indianapolis, IN 46208								
To provide for the Butler Innovation Fund.								
1002926 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Cathedral High School 5225 E. 56th Street Indianapolis, IN 46226								
To provide scholarships for needy students.								
1002925 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546								
To provide general support.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Directors' Designation</b>								
1002790 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Children's Museum of Indianapolis, Inc. 3000 North Meridian Indianapolis, IN 46208								
To provide support for education and other museum initiatives.								
1002791 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208								
To provide for the general support.								
1002924 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
College Mentors for Kids 212 West 10th Street Suite B260 Indianapolis, IN 46202								
To provide general operating support.								
1002794 STD	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
Dyslexia Institute of Indiana, Inc. 8395 Keystone Crossing, Suite 102 Indianapolis, IN 46240								
To provide for the general support.								
1002811 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Florida Gulf Coast University Foundation 10501 FGCU Boulevard South Fort Myers, FL 33965-6565								
To provide for the First Generation Scholarship Program.								
1002888 STD	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
Higher Learning Commission 230 South LaSalle Street Suite 7-500 Chicago, IL 60604-1411								
To study dual credit and issues impacting regional accreditations.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Directors' Designation</b>								
1002431 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Hispanic College Fund 1301 K Street, Northwest Suite 450A Washington, DC 20005								
To support the Hispanic College Fund.								
1002953 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Hispanic Scholarship Fund 55 Second Street Suite 1500 San Francisco, CA 94105								
To provide general program support.								
1002954 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Hispanics in Philanthropy 55 Second Street, Suite 1500 San Francisco, CA 94105								
To provide general program support.								
1002792 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Hutson School 7245 East 75th Street Indianapolis, IN 46256								
To provide for the general support.								
1002552 STD	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
Illinois Institute of Technology Suite 310 565 West Adams Street Chicago, IL 60661								
To support the PLUS program for low income students.								
1002555 STD	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation 530 West New York Street Indianapolis, IN 46202								
To support enrollment and success of low income students.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Directors' Designation</b>								
1002899 STD Indiana University Foundation P.O. Box 500 Bloomington, IN 47402	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support for the Herron School of Art and Design.								
1002786 STD International School of Indiana, Inc. 4330 North Michigan Road Indianapolis, IN 46208	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002846 STD Norfolk State University Foundation, Inc. Office of the President 700 Park Avenue Suite 520 Norfolk, VA 23504-8000	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To provide for the underprepared student program.								
1002785 STD Northwestern University 2020 Ridge Avenue, Suite 230 Gift/Record Services Evanston, IL 60208-4305	\$0	\$4,000	\$4,000	\$0	\$0	\$0	\$0	\$0
To support the Medill School of Journalism.								
1002955 STD Parents Step Ahead 2102 Empire Center Dallas, TX 75235	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
To provide general program support.								
1002557 STD Providence Cristo Rey High School 75 North, Bellevue Place Indianapolis, IN 46222	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide scholarship support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Directors' Designation</b>								
1002920 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Regents of the University of California University of California 1111 Franklin Street Oakland, CA 94607								
To be distributed evenly among the 10 campuses in support of the "Project You Can" Scholarships.								
1002645 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Saint Anselm College 100 St. Anselm Drive, Box 1738 Manchester, NH 03102-1310								
To support the Abbot Gerald McCarthy, O.S.B. Award scholarship fund.								
1002866 STD	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
St. Joseph's College of Maine 278 White's Bridge Road Standish, ME 04084								
To provide for scholarship programs.								
1002793 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
The Mind Trust 407 N. Fulton Street, Suite 102 Indianapolis, IN 46202								
To provide for the general support.								
1002432 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208								
To give support to the local United Negro College Fund.								
1002919 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
University of California Berkeley Foundation 2080 Addison Street, #4200 Berkeley, CA 94720-4200								
To support need-based John L. Burris scholarships at UC Berkeley School of Law.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Directors' Designation</b>								
1002593 STD	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
University of Dubuque 2000 University Avenue Dubuque, IA 52001								
To support the annual mission and vision fund.								
1002921 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
University of Pennsylvania 601 Franklin Building 3451 Walnut Street Philadelphia, PA 19104								
To support need-based scholarships at the School of Arts and Sciences.								
1002843 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Xavier University of Louisiana 1 Drexel Drive New Orleans, LA 70125-1098								
To support the program for underprepared students.								
1002845 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Xavier University Preparatory School Office of Development 5116 Magazine Street New Orleans, LA 70115-1844								
To provide support for the underprepared students.								
<b>Total for Directors' Designation</b>								
	\$0	\$300,000	\$300,000	\$0	\$0	\$0	\$0	\$0
<b>Length of Service Gift</b>								
1002887 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Alpha Kappa Alpha Educational/Advancement Foundation, Inc. 5656 South Stony Island Avenue Chicago, IL 60637								
To provide support for scholarships in the Indianapolis area.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Length of Service Gift								
1002623 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Cats Haven, LTD								
PO Box 30206								
Indianapolis, IN 46230								
To support the care and well being of the cats at Cats Haven.								
1002519 STD								
CrimeStoppers of Sangamon & Menard Counties, Inc.								
P.O. Box 1059								
Springfield, IL 62705								
To provide support where needed without restriction.								
1002508 STD								
Dominican Literacy Center, Aurora								
260 Vermont Avenue								
Aurora, IL 60505								
To support English literacy training.								
1002586 STD								
Friends of Holiday Park								
6363 Spring Mill Road								
Indianapolis, IN 46260								
To provide general support.								
1002962 STD								
Friendship Missionary Baptist Church								
1301 North Goodlet Avenue								
Indianapolis, IN 46222								
To support the Arthur Johnson Scholarship fund.								
1002472 STD								
Girls Incorporated of Greater Indianapolis								
3935 North Meridian Street								
Indianapolis, IN 46208-4011								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<i>Length of Service Gift</i>								
1002485 STD Gleaners Food Bank of Indiana, Inc. 3737 Waldemer Avenue Indianapolis, IN 46241	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide support without restriction.								
1002474 STD Hey U.G.L.Y P.O. Box 345 Rolling Prairie, IN 46371	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To help teach children empathy to curb bullying in schools.								
1002587 STD Morgan County Humane Society 690 W. Mitchell Ave. Martinsville, IN 46151	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002442 STD National Childhood Cancer Foundation 4600 East West Highway, Suite 600 Bethesda, MD 20814	\$0	\$1,000	\$1,000	\$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.								
1002455 STD Operation Mend 10945 LeConte Avenue, Suite 3132 Los Angeles, CA 90095	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Length of Service Gift								
1002798 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206								
To support the Women's Health Fund to assist low-income women with family planning supplies, cancer screenings, sexually transmitted infection testing and treatment, and cervical cancer treatments.								
1002825 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807								
To provide for the new church organ.								
1002932 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Stepping Stones, Inc. P.O. Box 1366 Bloomington, IN 47402								
To provide for youth experiencing homelessness.								
1002918 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Wilberforce University 1055 North Bickett Road Wilberforce, OH 45384-1001								
To provide for the Dr. Yvonne Walker-Taylor/AKA endowment fund.								
Total for Length of Service Gift	\$0	\$11,500	\$11,500	\$0	\$0	\$0	\$0	\$0
Matching Gift								
1002616 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Aids Task Force, Inc. 525 Oxford St. Fort Wayne, IN 46806								
To improve the quality of life for those with Aids and provide community education.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002644 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
Alice's, Inc. P.O. Box 124 Valparaiso, IN 46384								
To provide for the general support.								
1002827 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
ALS Association -Wisconsin Chapter 3333 North Mayfair #213 Wauwatosa, WI 53222								
To support ALS fund-raising efforts in the Milwaukee Walk to Defeat ALS.								
1002911 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Alzheimers Disease and related Disorders Association, Inc. 225 North Michigan Aveune 17th floor Chicago, IL 60601-7633								
To provide for the general donation.								
1002561 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
American Cancer Society 17060 Oak Park Avenue Tinley Park, IL 60477								
To support Kathy Wellmans participation on the praying for a cure Relay for Life event.								
1002905 STD	\$0	\$915	\$915	\$0	\$0	\$0	\$0	\$0
American Cancer Society 5635 West 96th Street, Suite 100 Indianapolis, IN 46278								
To support breast cancer research in honor of Joan Eaton.								
1002535 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907								
To provide general operating support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002725 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support research for a cancer cure.								
1002829 STD American Cancer Society Great Lakes Division, Inc 1755 Abbey Road East Lansing, MI 48823-1907	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide for the general need.								
1002860 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To fund research for a cure to diabetes.								
1002861 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250	\$0	\$153	\$153	\$0	\$0	\$0	\$0	\$0
To fund research for a diabetes cure.								
1002862 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To fund research for a diabetes cure.								
1002871 STD American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To support ADA research.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002872 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
American Diabetes Association Inc. 6415 Castleway West Drive Suite 114 Indianapolis, IN 46250								
To support diabetes research.								
1002510 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
American Heart Association 5375 Southwest 7th Street Topeka, KS 66606								
To provide general support in honor of Anna and Emma Clymore's participation in a Jump Rope for Heart event.								
1002529 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
American Heart Association 5375 Southwest 7th Street Topeka, KS 66606								
To sponsor Robbie Morales' participation in Jump for Heart on February 14th and 16th in honor of Cody at Smith Elementary School of Martinsville.								
1002717 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
American Heart Association 5375 Southwest 7th Street Topeka, KS 66606								
To provide support for general programs and research.								
1002848 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
American Heart Association 5375 Southwest 7th Street Topeka, KS 66606								
To support the general program.								
1002928 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
American Honda Education Corporation 2750 Notalah Road Estes Park, CO 80517								
To provide unrestricted support for Eagle Rock School.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002452 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221								
To support education access.								
1002737 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221								
To provide for the scholarship fund.								
1002582 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
American Jewish University 15600 Mulholland Drive Los Angeles, CA 90077								
To support the work of the Ziegler School of Rabbinic Studies at the American Jewish University.								
1002669 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
American National Red Cross P.O. Box 37295 Washington, DC 20013								
To provide support for communities affected by the earthquake and tsunami in Japan.								
1002670 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
American National Red Cross P.O. Box 37295 Washington, DC 20013								
To provide support for the victims of the Japanese earthquake.								
1002877 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
American National Red Cross P.O. Box 37295 Washington, DC 20013								
To provide assistance in the African drought program.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002501 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
American Red Cross, Greater Houston Chapter 2700 Southwest Freeway Houston, TX 77098								
To contribute to the fundraising efforts by Greg Tennessee in the Tour du Rouge bike ride for Red Cross.								
1002602 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
American University in Bulgaria, The 910 17th Street, Northwest Suite 1100 Washington, DC 20006								
To support endowed scholarships.								
1002596 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Amyotrophic Lateral Sclerosis Association 2807 Amsterdam Road Villa Hills, KY 41017								
To support the ALS organization and its victims.								
1002951 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Amyotrophic Lateral Sclerosis Association 2807 Amsterdam Road Villa Hills, KY 41017								
To support ALS research.								
1002342 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004								
To provide support for grant funding and general operations.								
1002343 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Arizona Foundation for Women 2828 North Central Avenue, Suite 1200 Phoenix, AZ 85004								
To support the 2011 Sandra Day O' Conner Awards Luncheon.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002801 STD Assumption Catholic Church Box 287-207 East 3rd Street Morris, MN 56267	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide for the general support in memory of Darlene Awsb.								
1002806 STD Autism Advocates of Indiana P.O. Box 285 Fishers, IN 46038	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
To support Team Caleb in the 2011 AAI Walk.								
1002493 STD Avon Products Foundation, Inc. P O Box 1073 Avon Plaza Rye, NY 10580	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide support for breast cancer.								
1002980 STD Backstreet Missions, Inc. 215 South Westplex Avenue Bloomington, IN 47404	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To support ongoing services for food, clothing, and shelter needs in the Bloomington community.								
1002819 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To provide for the Bold Celebration Scholars.								
1002820 STD Ball State University Foundation 2800 West Bethel Avenue Muncie, IN 47304	\$0	\$11,250	\$11,250	\$0	\$0	\$0	\$0	\$0
To provide for the Jim and MaryBeth Lintzenich Freshman Merit Scholarship.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002340 STD Banner Health Foundation 2025 N. 3rd Street, Suite 250 Phoenix, AZ 85004	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Banner MD Anderson Cancer Center.								
1002640 STD Banner Health Foundation 2025 N. 3rd Street, Suite 250 Phoenix, AZ 85004	\$0	\$20,000	\$20,000	\$0	\$0	\$0	\$0	\$0
To provide support to the M.D. Anderson Cancer Center.								
1002719 STD Bergen Catholic High School 1040 Oradell Avenue Oradell, NJ 07649	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
To provide for the annual fund.								
1002402 STD Big Brothers Big Sisters of Central Indiana, Inc. 2960 N. Meridian Street Suite 150 Indianapolis, IN 46208-4715	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
For general operations in support of annual giving.								
1002965 STD Big Brothers Big Sisters of Metropolitan Detroit 7700 Second Sveneue Suite 602 Detroit, MI 48202	\$0	\$1,365	\$1,365	\$0	\$0	\$0	\$0	\$0
To support the 4th Annual Greck Bowling Challenge.								
1002418 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To provide support for the annual fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002573 STD Bishop Chatard High School 5885 Crittenden Avenue Indianapolis, IN 46220	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
To provide support for the capital campaign.								
1002648 STD Blue River Community Foundation 54 W. Broadway, Suite 1 Shelbyville, IN 46176	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
To provide for the special projects fund that directly benefits the Blue River Career Project HOSA project.								
1002498 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002545 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1002891 STD Boy Scouts of America Council 7125 Fall Creek Road North Indianapolis, IN 46256	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002401 STD Brebeuf Jesuit Preparatory 2801 W. 86th Street Indianapolis, IN 46268-1925	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide scholarship support for the Angel Fund.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002938 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Broward Children's Center, Inc. 200 Southeast 19th Avenue Pomano Beach, FL 33060								
To provide general support without restriction.								
1002414 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Butler University 4600 Sunset Avenue Indianapolis, IN 46208								
To support College of Education without restriction.								
1002851 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Butler University 4600 Sunset Avenue Indianapolis, IN 46208								
To provide scholarships for athletes.								
1002808 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Campus Crusade for Christ, Inc. 100 Lake Hart Drive Orlando, FL 32832								
To support the general support.								
1002722 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Cancer Support Community 5150 West 71st Street Indianapolis, IN 46268								
To support the general need.								
1002838 STD	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
Cancer Support Community of Central Indiana 5150 West 71st Street Indianapolis, IN 46268								
To provide for the general support.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002828 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Care for Kids Foundation 4760 Kingsway Drive Indianapolis, IN 46205								
To provide assistance for at risk foster youth who go to Care for Kids Summer Camp at Bradford Woods.								
1002499 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Carmel Clay Education Foundation 5201 East 131st Street Carmel, IN 46033								
To provide general support.								
1002327 STD	\$75	\$0	\$75	\$0	\$0	\$0	\$0	\$0
Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250								
To support teacher appreciation.								
1002359 STD	\$0	\$1,071	\$1,071	\$0	\$0	\$0	\$0	\$0
Castleton United Methodist Nursery School 7101 North Shadeland Indianapolis, IN 46250								
To support the CUMINS kids endowment fund in honor of Jill Kramer and her service to Lumina Foundation and her community.								
1002389 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Cathedral High School 5225 E. 56th Street Indianapolis, IN 46226								
To provide support for scholarship funds.								
1002400 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Catholic Relief Services P.O. Box 17090 Baltimore, MD 21298								
To provide general operating support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002423 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Catholic Youth Organization 580 E. Stevens Street Indianapolis, IN 46203								
As a memorial contribution to recognize Jim Flanagan.								
1002507 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
CATO Institute 1000 Massachusetts Avenue Washington, DC 20001								
To provide general support without restriction.								
1002856 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Cats Haven, LTD PO Box 30206 Indianapolis, IN 46230								
To support the cats at Cat's Haven.								
1002456 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Center for Positive Living 330 South Pineapple Avenue Suite 210 Sarasota, FL 34236								
To provide general support.								
1002460 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498								
To support women's causes.								
1002509 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498								
As a contribution to the endowment to support services for women and children.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002687 STD	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N. Alabama Street Room 119 Indianapolis, IN 46204-1498								
To provide for the needs of the women and girls.								
1002700 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204								
To provide support for the women's fund.								
1002705 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204								
To provide funds for Latino students scholarships.								
1002635 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
CG Jung Society of Sarasota Inc. P.O. Box 50611 Sarasota, FL 34232								
To provide general support.								
1002638 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
CG Jung Society of Sarasota Inc. P.O. Box 50611 Sarasota, FL 34232								
To provide support to the endowment.								
1002376 STD	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
Child Crisis Center East Valley, Inc. PO Box 4114 Mesa, AZ 85211								
To support general operations.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002748 STD Children's Museum of Indianapolis, Inc. 3000 North Meridian Indianapolis, IN 46208	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002815 STD Christ the King Catholic Church 5858 Crittenden Avenue Indianapolis, IN 46220	\$0	\$90	\$90	\$0	\$0	\$0	\$0	\$0
To provide for the general support in memory of Gracie Bill.								
1002410 STD Christ United Methodist Church 8540 US 31 South Indianapolis, IN 46227	\$0	\$1,943	\$1,943	\$0	\$0	\$0	\$0	\$0
To provide general operating support. No part of this gift shall be used for pastor salaries or personal benefits.								
1002514 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
To provide support for the general operating fund.								
1002544 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To support general operating expenses.								
1002755 STD Christ United Methodist Church 318 North Union Westfield, IN 46074	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To use \$750 for the operating expenses, and \$750 to be used for the building fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002966 STD	\$0	\$1,350	\$1,350	\$0	\$0	\$0	\$0	\$0
Christ United Methodist Church 318 North Union Westfield, IN 46074								
To use \$675 for the operating expenses, and \$675 to be used for the building fund.								
1002782 STD	\$0	\$1,080	\$1,080	\$0	\$0	\$0	\$0	\$0
Christian Foundation for Children and Aging One Elmwood Avenue Kansas City, KS 66103								
To provide for the CFCA's Santa Catarina project in Monterey, Mexico, in honor of Yovana Elizabeth Sanchez Mendoza.								
1002618 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208								
To match the Lilly Endowment Challenge.								
1002673 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Christian Theological Seminary, The 1000 West 42nd Street Indianapolis, IN 46208								
To provide support for the students.								
1002621 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Church of the Saviour United Methodist Church 6205 Rucker Road Indianapolis, IN 46220								
To support the general fund.								
1002604 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
College of William and Mary P.O. Box 1693 Williamsburg, VA 23187-1963								
To support the 1st L.T. Todd W. Weaver Memorial Award.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002952 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
College Success Foundation 1605 Northwest Sammamish Road Suite 200 Issaquah, WA 98027								
To support the Leadership 1000 Scholarship Fund.								
1002462 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Community Foundation of Northern Colorado 4745 Wheaton Drive, Suite 100 Fort Collins, CO 80525								
To support the Estes Valley Community Fund Legacy.								
1002497 STD	\$0	\$414	\$414	\$0	\$0	\$0	\$0	\$0
Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support where most needed.								
1002627 STD	\$0	\$552	\$552	\$0	\$0	\$0	\$0	\$0
Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide general support.								
1002865 STD	\$0	\$105	\$105	\$0	\$0	\$0	\$0	\$0
Compassion International Inc. 12290 Voyager Parkway Colorado Springs, CO 80921								
To provide support as needed.								
1002745 STD	\$0	\$60,000	\$60,000	\$0	\$0	\$0	\$0	\$0
Congregation of Holy Cross, U.S. Province P.O. Box 774 Norte Dame, IN 46556								
To provide health care of the elderly religious.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002387 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038								
To provide general support.								
1002611 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038								
To support Conner Prairie's Civil War Project.								
1002733 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038								
To provide for the general support.								
1002975 STD	\$0	\$8,040	\$8,040	\$0	\$0	\$0	\$0	\$0
Conner Prairie Museum, Inc. 13400 Allisonville Road Fishers, IN 46038								
To provide general operating support.								
1002506 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Contra Costa Jewish Community Center 2071 Tice Valley Boulevard Walnut Creek, CA 94595								
To support cultural arts programming.								
1002805 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Contra Costa Jewish Community Center 2071 Tice Valley Boulevard Walnut Creek, CA 94595								
To provide support for the Renaissance Fund.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002852 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Contra Costa Jewish Day School 3836 Mount Diablo Boulevard Lafayette, CA 94549								
To provide for future building expansion.								
1002853 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
Contra Costa Jewish Day School 3836 Mount Diablo Boulevard Lafayette, CA 94549								
To support the school and help provide more scholarship.								
1002855 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Corona Del Sol High School 908 E. Derby Drive Tempe, AZ 85284								
To support the wrestling program.								
1002879 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Corona Del Sol High School 1001 East Knox Road Tempe, AZ 85284								
To provide support to the choir program.								
1002634 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Dance Kaleidoscope, Inc. 4603 Carendon Road, Suite 32 Indianapolis, IN 46208								
To provide general support.								
1002187 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Dartmouth Hitchcock Medical Center One Medical Center Drive Lebanon, NH 03756								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002878 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Dartmouth Hitchcock Medical Center One Medical Center Drive Lebanon, NH 03756								
To support the annual fund.								
1002664 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
DePauw University 300 East Seminary Street P.O. Box 37 Greencastle, IN 46135-0037								
To provide for the annual fund.								
1002753 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
DePauw University 300 East Seminary Street P.O. Box 37 Greencastle, IN 46135-0037								
To provide for the general support.								
1002360 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
Diocese of New Jersey 7th & Central Ave, PO Box 428 Barnegat Light, NJ 08006								
To support community outreach.								
1002350 STD	\$3,000	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0
Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484								
To support the 2010 Catholic Faith Appeal.								
1002650 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484								
To support the Christmas Appeal.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002893 STD	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
Diocese of Venice in Florida P.O. Box 2116 Venice, FL 32484								
To provide \$2000 for the Christmas Appeal and \$1000 for the general fund.								
1002694 STD	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
Drexel University Office of Institutional Advancement 3141 Chestnut Street, Suite 310 Philadelphia, PA 19104								
To provide for scholarships.								
1002693 STD	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
Duke University P.O. Box 90581 Durham, NC 27708-0581								
To provide for Trinity Colleges needed bascd aid and general operating fund.								
1002484 STD	\$0	\$42,255	\$42,255	\$0	\$0	\$0	\$0	\$0
Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218								
To support the Land and Building Initiative.								
1002372 STD	\$0	\$525	\$525	\$0	\$0	\$0	\$0	\$0
Educational Media Foundation 5700 West Oaks Boulevard Rocklin, CA 95765								
To support KLOVE radio.								
1002486 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Educational Media Foundation 5700 West Oaks Boulevard Rocklin, CA 95765								
To provide support for K-LOVE radio.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002675 STD	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
Equal Justice America 13540 E. Boundary Road, Building II Suite 204 Midlothian, VA 23112								
To provide access to needed legal services to poor and underserved populations who otherwise could not afford it.								
1002901 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Estes Park Learning Place, The 600 South Street Vrain Avenue Unit 2 Estes Park, CO 80517								
To provide unrestricted support.								
1002817 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Estes Park Non Profit Resource Center, Inc. P.O. Box 4221 Estes Park, CO 80517								
To provide for the general support.								
1002789 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Excelencia in Education, Inc. 1752 N Street Northwest 6th Floor Washington, DC 20036								
To continue to enhance the completion agenda for Latino Students.								
1002356 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Faith Presbyterian Church 8170 Hague Road Indianapolis, IN 46256								
To provide general support for debt reduction.								
1002406 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481								
To provide for social services.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002703 STD	\$0	\$3,900	\$3,900	\$0	\$0	\$0	\$0	\$0
Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481								
To provide for the general support.								
1002943 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481								
To provide for general support.								
1002774 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
First Christian Church (Disciples of Christ) 1507 Glendale Boulevard Valparaiso, IN 46383								
To support the general need in memory of Eloise H. Grich.								
1002477 STD	\$0	\$6,192	\$6,192	\$0	\$0	\$0	\$0	\$0
First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106								
To provide support where most needed.								
1002657 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106								
To provide general support.								
1002875 STD	\$0	\$2,970	\$2,970	\$0	\$0	\$0	\$0	\$0
First Christian Church of Bargersville P.O. Box 15 101 East Street Bargersville, IN 46106								
To support the general need.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002874 STD Fistula Foundation, The 1910 The Alameda, Suite 500 San Jose, CA 95126	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the work of surgeries.								
1002935 STD Florida International University MARC 540 11200 Southwest 8th Street Miami, FL 33199	\$0	\$2,250	\$2,250	\$0	\$0	\$0	\$0	\$0
To provide for the Educational Leadership Enhancement Program, directed by Barbara Bader.								
1002743 STD Florida Studio Theatre, Inc. 1241 North Palm Avenue Sarasota, FL 34236	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002363 STD Foundation for Lutheran Child and Family Services Indiana Inc. 1525 North Ritter Avenue Indianapolis, IN 46219	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide support for music programs.								
1002684 STD Franklin College of Indiana 101 Branigin Boulevard Franklin, IN 46131	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide for operating support/Franklin fund.								
1002950 STD Girls Incorporated of Greater Indianapolis 3935 North Meridian Street Indianapolis, IN 46208-4011	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide for general support.								

**Annual Report Financial Information - 2011**  
**Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002362 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Give Kids The World 210 South Bass Road Kissimmee, FL 34746								
To provide general operating support.								
1002422 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Gleaners Food Bank of Indiana, Inc. 3737 Waldemer Avenue Indianapolis, IN 46241								
To support the food bank.								
1002396 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Golden Retriever Reserve & Community Education, Inc. (GRRACE) P.O. Box 513 Plainfield, IN 46168								
To provide general operating support for homeless animals.								
1002373 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Goodwill Education Initiatives, Inc. 1635 West Michigan Street Indianapolis, IN 46222								
To provide general support for the school.								
1002391 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852								
To provide support for the charter school.								
1002728 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852								
To provide for the general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002978 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Goodwill Industries of Central Indiana, Inc. 1635 West Michigan Street Indianapolis, IN 46222-3852								
To provide for social services and education.								
1002736 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Greater Indianapolis Literacy League, Inc. 2450 North Meridian Street Indianapolis, IN 46208								
To provide for the general support.								
1002981 STD	\$0	\$750	\$0	\$0	\$0	\$0	\$0	\$750
Guild, Inc. 130 Wabasha Street South, Suite 90 Saint Paul, MN 55107								
To support the Dakota South's location for direct client support, particularly if it would allow an extended stay for those who would benefit from more time at the facility. This gift is in honor of Stephen Chapman and his family.								
1002933 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Habitat for Humanity International, Inc. P.O. Box 1252 1011 E. 22nd Street Indianapolis, IN 46206-1252								
To support the Habitat for Humanity home project sponsored by students from Park Tudor.								
1002409 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Haiti Nursing Foundation P.O. Box 3008 Ann Arbor, MI 48106-3008								
To provide support for the nursing school education program.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002685 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Hamilton County Community Tennis Association(HCCTA) 225 East Carmel Drive Carmel, IN 46032								
To provide for the HCCTA book program.								
1002392 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076								
To provide general support.								
1002839 STD	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076								
To provide general support.								
1002850 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Heartland Truly Moving Pictures, Inc. Heartland Film Festival 200 S. Meridian St., Suite 220 Indianapolis, IN 46225-1076								
To support the art of film making and educational outreach.								
1002338 STD	\$0	\$12,500	\$12,500	\$0	\$0	\$0	\$0	\$0
Heckscher Museum of Art 2 Prime Avenue Huntington, NY 11743-7702								
To provide support where most needed.								
1002834 STD	\$0	\$12,000	\$12,000	\$0	\$0	\$0	\$0	\$0
Heckscher Museum of Art 2 Prime Avenue Huntington, NY 11743-7702								
To provide for the general need.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
Matching Gift								
1002546 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Hillel the Foundation for Jewish Campus Life								
2736 Bancroft Way								
Berkeley, CA 94704								
To provide Passover meals for students.								
1002931 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Holy Cross Hospital, Inc.								
4725 North Federal Highway								
Fort Lauderdale, FL 33308								
To provide support solely for the work of Dr. Ena Segota.								
1002370 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit at Geist Catholic Church								
10350 Glaser Way								
Fishers, IN 46038								
To provide general operating support.								
1002603 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit at Geist Catholic Church								
10350 Glaser Way								
Fishers, IN 46038								
To support the general operating fund.								
1002759 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit at Geist Catholic Church								
10350 Glaser Way								
Fishers, IN 46038								
To provide for the general support.								
1002976 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit at Geist Catholic Church								
10350 Glaser Way								
Fishers, IN 46038								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002800 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit Catholic Church and School 7243 E. 10th Street Indianapolis, IN 46219								
To provide general support.								
1002915 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Holy Spirit Catholic Church and School 7243 E. 10th Street Indianapolis, IN 46219								
To provide for the general support.								
1002622 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Hooiser Road Elementary Parent Teacher Organization 11300 E. 121st. St. Fishers, IN 46037								
To support educational activities at Hooiser Road Elementary.								
1002760 STD	\$0	\$720	\$720	\$0	\$0	\$0	\$0	\$0
Horton VNA Hospice Center 2404 Valparaiso Street Valparaiso, IN 46383								
To honor the memory of Eloise Grich.								
1002500 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
House of Hope Presbyterian Church, The 797 Summit Avenue St. Paul, MN 55105								
To provide general support.								
1002447 STD	\$0	\$4,800	\$4,800	\$0	\$0	\$0	\$0	\$0
Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002534 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060								
To support the well-being of animals at the Humane Society.								
1002945 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060								
To support the Humane Society's services.								
1002971 STD	\$0	\$5,100	\$5,100	\$0	\$0	\$0	\$0	\$0
Humane Society for Hamilton County 1721 Pleasant Street, Suite B Noblesville, IN 46060								
To provide general support.								
1002606 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Humane Society of Indianapolis 7929 North Michigan Road Indianapolis, IN 46268								
To support the general fund.								
1002366 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Humane Society of the United States 2100 L Street, NW Washington, DC 20037								
To provide general operating support.								
1002421 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Impact 100 Greater Indianapolis, Inc. P.O. Box 40531 Indianapolis, IN 46240								
To support the annual fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002417 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Independent Colleges of Indiana, Inc. 3135 North Meridian Street Indianapolis, IN 46208-4717								
To support Higher Education access.								
1002680 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Indiana Amateur Baseball Association 7160 Zionsville Road Indianapolis, IN 46268								
To provide for the operating fund.								
1002942 STD	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
Indiana Bar Foundation 230 East Ohio St., Suite 400 Indianapolis, IN 46204								
To provide support for general operations.								
1002358 STD	\$0	\$1,071	\$1,071	\$0	\$0	\$0	\$0	\$0
Indiana Children's Wish Fund 6435 Castlaway West Drive Suite 130 Indianapolis, IN 46205								
To provide direct support to granting children's wishes in honor of Pam Griffin's service to Lumina Foundation and her community.								
1002393 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Indiana Family Institute 155 East Market Street, Suite 307 Indianapolis, IN 46204								
To support marriage and relationship counseling.								
1002904 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Indiana Grantmakers Alliance, Inc. Suite 1100 Symphony Centre 32 E. Washington Street Indianapolis, IN 46204-3583								
To provide support for the Youth Philanthropy Initiative of IN/Eileen Ryan Fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002734 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Indiana Repertory Theatre, Inc. 140 W. Washington Street Indianapolis, IN 46204								
To provide for the general support.								
1002331 STD	\$3,000	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0
Indiana State University Foundation, Inc. 217 N. 6th Gilium Hall 320 Terre Haute, IN 47809								
To use \$1,500 of this gift to support the College of Education. The remaining \$1,500 is to support the Indiana outreach G.L.A.M program, founded and directed by Shanel Poole.								
1002729 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Indiana State University Foundation, Inc. 217 N. 6th Gilium Hall 320 Terre Haute, IN 47809								
To provide \$1,500 to the College of Education, and \$1,500 to G.L.A.M. for young women.								
1002395 STD	\$0	\$2,100	\$2,100	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide general support.								
1002620 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide musical education and family support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002633 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide general operating support.								
1002692 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide for symphonic and educational programs.								
1002747 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide for the general support.								
1002842 STD	\$0	\$7,287	\$7,287	\$0	\$0	\$0	\$0	\$0
Indiana Symphony Society 32 East Washington Street Suite 600 Indianapolis, IN 46204-2919								
To provide for the general support.								
1002354 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for general programs and where most needed.								
1002378 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To support the cardiology gift fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002384 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To support the class of 1983.								
1002411 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide general support to the IU School of Business, Indianapolis for need-based scholarship aid with \$750. The remaining \$750 is to support the School of Health and Rehabilitation Sciences.								
1002413 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide general support for Journalism School scholarships.								
1002420 STD	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide general support for the IU School of Law, Indianapolis campus.								
1002424 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To support the Medical School Fellowship program.								
1002425 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
As a memorial contribution honoring Karen Lake.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002480 STD	\$0	\$36,000	\$36,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for programs as designated by Mr. Bepko. Please refer to the attached list.								
1002668 STD	\$0	\$9,000	\$9,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide general operating support.								
1002672 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation 530 West New York Street Indianapolis, IN 46202								
To provide for the 2011 Annual Fund.								
1002689 STD	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for the History Department's general fund and Varsity Club's annual giving.								
1002690 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation 530 West New York Street Indianapolis, IN 46202								
To provide support for the law students and the school's needs.								
1002697 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for the School of Health and Rehabilitation.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002709 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for the Armstrong Foundation in teaching education.								
1002724 STD	\$0	\$39,000	\$39,000	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for programs as designated by Mr. Bepko. Please refer to the attached list.								
1002740 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide support for music education.								
1002803 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To provide for the Jesse Jones Fund for Head and Neck Cancer Research.								
1002859 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Indiana University Foundation P.O. Box 500 Bloomington, IN 47402								
To support the IUPUI Music Academy's Scholarship Fund providing music lessons to students whose parents cannot afford their music study.								
1002388 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
Matching Gift								
1002730 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
Indianapolis Art Center 820 East 67th Street Indianapolis, IN 46220								
To provide for the general support.								
1002837 STD	\$0	\$2,140	\$2,140	\$0	\$0	\$0	\$0	\$0
Indianapolis Museum of Art 4000 Michigan Rd Indianapolis, IN 46208-3326								
To provide for the general support.								
1002844 STD	\$0	\$9,486	\$9,486	\$0	\$0	\$0	\$0	\$0
Indianapolis Zoological Society 1200 West Washington Street Indianapolis, IN 46222								
To support the general funds.								
1002483 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Indianapolis-Marion County Public Library Foundation, Inc. P.O. Box 6134 2450 North Meridian Street Indianapolis, IN 46206								
To provide general operating support.								
1002516 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054								
To support IndyFeral and its efforts to protect and care for feral cats.								
1002833 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054								
To provide support for the homeless and abandoned cats in the community.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002913 STD	\$0	\$75	\$75		\$0	\$0	\$0	\$0
IndyFeral, Inc. PO Box 30054 Indianapolis, IN 46230-0054								
To provide for the spaying or neutering of feral cats or kittens.								
1002723 STD	\$0	\$600	\$600		\$0	\$0	\$0	\$0
Information and Referral Network, Inc 3901 North Meridian Street, Suite 300 Indianapolis, IN 46208								
To provide support for the general need.								
1002870 STD	\$0	\$1,035	\$1,035		\$0	\$0	\$0	\$0
Inheritance of Hope P.O. Box 90 Pisgah Forest, NC 28768								
To provide for the general support.								
1002907 STD	\$0	\$600	\$600		\$0	\$0	\$0	\$0
Irwin Academic Center PTA 329 North Irwin Avenue Charlotte, NC 28202								
To provide for SmartBoard purchase and installation in Mrs. Lee's class at the school.								
1002912 STD	\$0	\$1,350	\$1,350		\$0	\$0	\$0	\$0
Irwin Academic Center PTA 329 North Irwin Avenue Charlotte, NC 28202								
To provide for the purchase and installation of Smart Board in Mrs. Lee's Math classroom.								
1002674 STD	\$0	\$1,500	\$1,500		\$0	\$0	\$0	\$0
Ivy Tech Foundation 50 West Fall Creek Parkway North Drive Indianapolis, IN 46208								
To provide financial support for students.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002475 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509								
To provide general support.								
1002663 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
James Whitcomb Riley Memorial Association 30 South Meridian Street Suite 200 Indianapolis, IN 46204-3509								
To provide general support.								
1002487 STD	\$0	\$7,500	\$0	\$0	\$7,500	\$0	\$0	\$0
Jewish Federation of the Greater East Bay 2071 Tice Valley Boulevard Walnut Creek, CA 94595								
To support cultural arts programming.								
1002639 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Joyce Meyer Ministries, Inc. 700 Grace Parkway Fenton, MO 63026								
To provide support for the Hands of Hope.								
1002559 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Julian Center, Inc., The 2011 North Meridian Street Indianapolis, IN 46202								
To provide support for the legal assistance fund.								
1002394 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240								
To support research programs.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002830 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Juvenile Diabetes Research Foundation - Indiana State Chapter 8440 Woodfield Crossing Boulevard, Suite 201 Indianapolis, IN 46240								
To support the search for a cure to juvenile diabetes.								
1002374 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
Kiwanis Foundation of Indianapolis, Inc. 320 North Meridian, Suite 1020 Indianapolis, IN 46204								
To support college scholarships.								
1002735 STD	\$0	\$6,300	\$6,300	\$0	\$0	\$0	\$0	\$0
Knox College 2 East South Street, K-230 Galesburg, IL 61401								
To provide for the Annual Contribution.								
1002540 STD	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
Kongsvinger Lutheran Church P.O. Box 97 Donnelly, MN 56235								
To support the maintenance for cemetery at Kongsvinger church's in honor the Brandt and Awsumb families.								
1002732 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Kongsvinger Lutheran Church P.O. Box 97 Donnelly, MN 56235								
To support current or future upkeep and repairs to the cemetery in honor of the Brandt and Awsumb families.								
1002958 STD	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
La Familia Medical Center P.O. Box 5395 Sante Fe, NM 87502								
To provide general operating support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Matching Gift</b>								
1002368 STD Leukemia & Lymphoma Society, The 1311 Mamaroneck Avenue White Plains, NY 10605	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To provide general support.								
<b>1002605 STD</b>								
Leukemia & Lymphoma Society, The 5845 Richmond Highway, Suite 800 Alexandria, VA 22303	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
To support research.								
<b>1002444 STD</b>								
Leukemia and Lymphoma Society 530 Dexter Avenue North # 300 Seattle, WA 98109	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide general support.								
<b>1002914 STD</b>								
Leukemia and Lymphoma Society 530 Dexter Avenue North # 300 Seattle, WA 98109	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide research for CLL.								
<b>1002849 STD</b>								
Leukemia and Lymphoma Society, The 2 Oakwood Boulevard Suite 200 Hollywood, FL 33020	\$0	\$3,990	\$3,990	\$0	\$0	\$0	\$0	\$0
To support the Light the Night of LLS.								
<b>1002404 STD</b>								
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 and operation of ultrasound equipment for Life Centers.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002520 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Linden Hall School for Girls 212 East Main Street Lititz, PA 17543								
To support new academic facilities and programs.								
1002750 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Little Red Door Cancer Agency, The 1801 N. Meridian Street Indianapolis, IN 46202								
To provide for the general support.								
1002974 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Little Red Door Cancer Agency, The 1801 N. Meridian Street Indianapolis, IN 46202								
To provide general support.								
1002659 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Little Sisters of the Poor of Indianapolis, Inc. 2345 West 86th Street Indianapolis, IN 46260								
To provide general support.								
1002764 STD	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
Little Sisters of the Poor of Indianapolis, Inc. 2345 West 86th Street Indianapolis, IN 46260								
To support the general need.								
1002458 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Lupus Foundation of America, Indiana Chapter P.O. Box 68467 Indianapolis, IN 46278								
To provide general support.								



# **Annual Report Financial Information - 2011 Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002780 STD Lyme Congregational Church P.O. Box 27 Lyme, NH 03768	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
To provide for the Bicentennial Capital Campaign to restore the 200 year old church building.								
1002676 STD Maclester College 1600 Grand Avenue Saint Paul, MN 55105	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the Annual Fund.								
1002655 STD Make a Wish Foundation 7330 Woodland Drive Suite 201 Indianapolis, IN 46278	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002831 STD March of Dimes Birth Defects 136 E. Market St. Suite 500 Indianapolis, IN 46204	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To honor the retirement of Rev. Ted Cutrell.								
1002832 STD March of Dimes Birth Defects 136 E. Market St. Suite 500 Indianapolis, IN 46204	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To honor the christening of Bennett and Nolan Cutrell.								
1002592 STD March of Dimes Foundation 1345 Ohio Street Terre Haute, IN 47807	\$0	\$1,743	\$1,743	\$0	\$0	\$0	\$0	\$0
To support the March of Dimes program and research efforts on behalf Zeta Phi Beta-Epsilon Kappa Zeta 2011 team totals.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002744 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Marian High School 1311 South Logan Street Mishawaka, IN 46544								
To support the Knight Capital Campaign.								
1002890 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Marine Toys for Tots Foundation 18251 Quantico Gateway Drive Triangle, VA 22172								
To provide for the Christmas Donation.								
1002608 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Maion County Commission on Youth 3901 North Meridian Street, Suite 201 Indianapolis, IN 46208								
To provide general support.								
1002571 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Masorti Foundation 475 Riverside Dr., Suite 832 New York, NY 10115								
To provide support that will further enhance the work of the Masorti Foundation.								
1002960 STD	\$0	\$3,810	\$3,810	\$0	\$0	\$0	\$0	\$0
Mayo Foundation 200 1st Street, Southwest Rochester, MN 55905								
To provide support for Dr. Neil Kayis' Chronic Lymphocytic (CLL) Leukemia Research.								
1002511 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Mercer County Community College Foundation, Inc. 1200 Old Trenton Road Trenton, NJ 08690								
To provide support for Public Radio station WWFM.								

# **Annual Report Financial Information - 2011** **Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002386 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To support public radio with \$150.00. The remaining \$150.00 is for public television and general support.								
1002473 STD	\$0	\$598	\$598	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To support both radio and TV educational programming.								
1002543 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To support WFYI television and radio programming.								
1002628 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide support for public radio.								
1002715 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide for the WFYI campaign.								
1002775 STD	\$0	\$975	\$975	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide \$487 to the radio station, and \$487 for the TV station.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002776 STD	\$0	\$900	\$900	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide for the general support.								
1002777 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide for the general support.								
1002922 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To provide general operating support.								
1002739 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Michael J. Fox Foundation for Parkinson's Research Church Street Station P. O Box 780 New York, NY 10008								
To support Parkinson's research.								
1002972 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Midwest Academy, Inc. 801 Congressional Boulevard, Suite 600 Carmel, IN 46032								
To support the financial need-based scholarship fund.								
1002561 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Mills College 5000 MacArthur Blvd. Oakland, CA 94613								
To provide support for the Janet L. Holmgren Presidential Scholarship Fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002864 STD	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
Miracle Place Inc 940 North Temple Indianapolis, IN 46201								
To provide for the general operating support.								
1002491 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
Montshire Museum of Science One Montshire Road Norwich, VT 05055-9905								
To support the Pavilion Project.								
1002810 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Montshire Museum of Science One Montshire Road Norwich, VT 05055-9905								
To provide for the general fund.								
1002542 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Moody Bible Institute of Chicago 820 North LaSalle Boulevard Chicago, IL 60610								
To support the 2011 campaign.								
1002351 STD	\$300	\$0	\$300	\$0	\$0	\$0	\$0	\$0
Mooreville Consolidated School Corporation 11 West Carlisle Street Mooreville, IN 46158								
To support the girls' basketball team in honor of Audra Pieper.								
1002779 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Mothers Against Drunk Driving (MADD) 511 East John Carpenter Freeway, Suite 700 Irving, TX 75061								
To provide for the general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002787 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218								
To provide for the operational support for the Community Outreach Initiatives such as weekly Teen Night Outreach, Community Workforce Development, and Community School-Aged Tutoring with Sylvan Learning.								
1002816 STD	\$0	\$21,705	\$21,705	\$0	\$0	\$0	\$0	\$0
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218								
To provide for the general support of the community outreach work.								
1002910 STD	\$0	\$6,219	\$6,219	\$0	\$0	\$0	\$0	\$0
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218								
To provide general operating support and community ministry.								
1002979 STD	\$0	\$3,510	\$3,510	\$0	\$0	\$0	\$0	\$0
Mount Moriah Missionary Baptist Church 2349-51 North Keystone Way Indianapolis, IN 46218								
To provide community ministry support.								
1002889 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
November, Inc. P.O. Box 2726 Venice, CA 90294								
To support Prostate Cancer research and education in honor of Nate Brandt's (id 1541707) fundraising efforts.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002385 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Mozel Sanders Foundation 709 North Belmont Avenue Indianapolis, IN 46226								
To provide general support.								
1002738 STD	\$0	\$1,830	\$1,830	\$0	\$0	\$0	\$0	\$0
Muscular Dystrophy Association 8777 Purdue Road, Suite 235 Indianapolis, IN 46268-								
To support the 2011 Indianapolis MDA executive's Look-up of J. David Maas, Lumina's CFO.								
1002763 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Muscular Dystrophy Association 8777 Purdue Road, Suite 235 Indianapolis, IN 46268-								
To provide for the general support.								
1002916 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
National Audubon Society 225 Varick Street 7th Floor New York, NY 10014								
To provide for unrestricted support.								
1002619 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
National Tuberosus Sclerosis Assn., Inc. 801 Roeder Rd. #750 Silver Spring, MD 20910								
To support research in find a cure for Tuberosus Sclerosis.								
1002892 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Nature Conservancy 22 Bridge Street, 4th Floor Concord, NH 03301								
To provide unrestricted support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002749 STD	\$0	\$450	\$450	\$0	\$0	\$0	\$0	\$0
New Harmony Project, The P.O. Box 441062 Indianapolis, IN 46244								
To provide for the general support.								
1002946 STD	\$0	\$1,875	\$1,875	\$0	\$0	\$0	\$0	\$0
Northern Stage Company PO Box 4287 White River Junction, VT 05001								
To provide support without restrictions.								
1002671 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Northwood Christian Church 4550 Central Avenue Indianapolis, IN 46205								
To provide for the food bank and ministry of the church.								
1002416 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.								
1002429 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support educational advancement programs.								
1002607 STD	\$0	\$25,000	\$25,000	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support the Notre Dame community engagement effort in Nnindye, Uganda.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
Matching Gift								
1002957 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Notre Dame Du Lac, University of Finance Office 1100 Grace Hall Notre Dame, IN 46556-5612								
To support the College of Arts and Letters summer undergraduate experiences program.								
1002964 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.								
1002917 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Open Doors of Washington Township, Inc. PO Box 196 Westfield, IN 46074								
To provide for the Thanksgiving food baskets.								
1002956 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Open Fields School PO box 53 37 Academy Road Thetford Hill, VT 05074								
To support the scholarship program.								
1002502 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Operation Smile 6435 Tidewater Drive Norfolk, VA 23509								
To provide general program support.								
1002667 STD	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
Orchard School Foundation 615 West 64th Street Indianapolis, IN 46260								
To provide for the general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002496 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Our Lady of Light Catholic Community 19680 Cypress View Drive Fort Meyers, FL 33967								
To provide general support.								
1002489 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Our Lady of Lourdes 5333 East Washington Street Indianapolis, IN 46219								
To provide support without restriction.								
1002632 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Outside the Box, Inc. 5420 North College Avenue Indianapolis, IN 46220								
To provide direct operating support to assist the OTB staff in empowering those with disabilities.								
1002451 STD	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
Oxfam America 226 Causeway Street, 5th Floor Boston, MA 02114								
To provide general support.								
1002701 STD	\$0	\$48,000	\$48,000	\$0	\$0	\$0	\$0	\$0
Permanent Endowment Fund for Martha's Vineyard P.O. Box 1182 Oak Bluffs, MA 02557								
To provide scholarships for low income students.								
1002548 STD	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
Phillips Exeter Academy 20 Main Street Exeter, NH 03833-2460								
To support the Ramsden Family scholarship fund at Exeter.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002328 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206	\$375	\$0	\$375	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1002963 STD Planned Parenthood of Indiana, Inc. 200 South Meridian Street, Suite 400 P.O. Box 397 Indianapolis, IN 46206	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002495 STD Presbyterian Church of Teaneck One Church Street Teaneck, NJ 07666	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002615 STD President and Trustees of Bates College 2 Andrews Road Lewiston, ME 04240	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To support the Bates Fund 2011.								
1002706 STD President Benjamin Harrison Foundation 1230 North Delaware Street Indianapolis, IN 46202	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
To provide for the general support for the Presidential site.								
1002367 STD PrimeLife Enrichment, Inc. 1078 Third Avenue, Southwest Carmel, IN 46032	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002698 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Purdue University 403 West Wood Street West Lafayette, IN 47907								
To provide support for the Ringel Gallery.								
1002349 STD	\$1,500	\$0	\$1,500	\$0	\$0	\$0	\$0	\$0
Reitz Memorial High School 1500 Lincoln Avenue Evansville, IN 47714								
To provide support for the 2010-2011 Annual Campaign.								
1002894 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Reitz Memorial High School 1500 Lincoln Avenue Evansville, IN 47714								
To support the 2011 Memorial Campaign.								
1002814 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Roscommon High School 702 Lake Street P.O. box 825 Roscommon, MI 48653								
To support the RHS Golf Program.								
1002695 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Sagamore Institute, Inc. 2902 North Meridian Street Indianapolis, IN 46209-4715								
To provide for the general support.								
1002361 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To provide general operating support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002405 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To provide general support.								
1002408 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To provide support for food and shelter.								
1002742 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To provide for the general support.								
1002754 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To provide general support.								
1002923 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 1445 West Broward Boulevard Ft. Lauderdale, FL 33312								
To provide support without restriction.								
1002490 STD	\$0	\$1,224	\$1,224	\$0	\$0	\$0	\$0	\$0
Save the Children Federation, Inc. 54 Wilten Road Westport, CT 06880								
To support efforts to improve children's lives around the world.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002530 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Scecina Memorial High School 5000 Nowland Ave Indianapolis, IN 46201								
To support need-based financial aid for students.								
1002949 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Scecina Memorial High School 5000 Nowland Ave Indianapolis, IN 46201								
To provide tuition assistance.								
1002443 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Scholarship America 1550 American Boulevard East, Suite 155 Minneapolis, MN 55425								
To provide general support without restriction.								
1002614 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Scholarship America P. O. Box 1044 Bloomington, IN 47402								
To support programmatic efforts and award scholarships.								
1002854 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Scholarship America 1550 American Boulevard East, Suite 155 Minneapolis, MN 55425								
To support the Zeta Phi Beta-Upsilon Kappa Zeta scholarship efforts.								
1002459 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220								
To support volunteer tutors for underprivileged students.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002699 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220								
To provide for the general support.								
1002788 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
School on Wheels, Corp. 2815 East 62nd Street, Suite 200 Indianapolis, IN 46220								
To provide for operating funds unrestricted.								
1002353 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807								
To provide general support.								
1002702 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807								
To provide general support.								
1002783 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Second Missionary Baptist Church 1400 Oak Street Terre Haute, IN 47807								
To help purchase a new organ.								
1002482 STD	\$0	\$37,500	\$37,500	\$0	\$0	\$0	\$0	\$0
Shepherd Community Center, Inc. 4107 East Washington Street Indianapolis, IN 46201								
To provide operating support without restriction.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002908 STD Shepherd Community Center, Inc. 4107 East Washington Street Indianapolis, IN 46201	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To provide support for the Tech High School START Project Band.								
1002934 STD Sisters of the Blessed Sacrament 1663 Bristol Pike Bensalem, PA 19020	\$0	\$2,700	\$2,700	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1002469 STD Smile Train, The 41 Madison Avenue, 28th Floor New York, NY 10010	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
1002939 STD Somos Un Pueblo Unido 1804 Espinactas Street Sante Fe, NM 87505	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide general support.								
1002426 STD Southern Poverty Law Center 400 Washington Avenue Montgomery, AL 36104	\$0	\$270	\$270	\$0	\$0	\$0	\$0	\$0
To support the Center efforts to fight hate groups and support acceptance of diversity.								
1002470 STD Southport Presbyterian Church 7525 McFarland Boulevard Indianapolis, IN 46227	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support the Parent's Day Out Ministries.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002968 STD	\$0	\$315	\$315	\$0	\$0	\$0	\$0	\$0
Southport United Methodist Church 1947 East Southport Road Indianapolis, IN 46227								
To provide general support.								
1002807 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Southside Animal Shelter 1614 West Edgewood Avenue Indianapolis, IN 46217								
To provide general support.								
1002448 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Southside Youth Council, Inc. 3505 North Washington Boulevard Indianapolis, IN 46205								
To support teen court and juvenile justice system.								
1002631 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260								
To support the general operating fund.								
1002773 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260								
To support the general operating fund.								
1002967 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
St. Charles Borromeo School 2224 East 3rd Street Bloomington, IN 47401								
To support the 2011-2012 wish list contribution.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002572 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
St. Ignatius College of Chicago 1076 W. Roosevelt Rd. Chicago, IL 60608								
To provide support for the service learning fund.								
1002390 STD	\$0	\$4,500	\$4,500	\$0	\$0	\$0	\$0	\$0
St. Ignatius College Prep 1076 West Roosevelt Road Chicago, IL 60608								
To support the Annual fund without restriction.								
1002895 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
St. Joseph Montessori School 933 Hamlet Street Columbus, OH 43201								
To support the 2011-2012 E-Newsletter.								
1002461 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015								
To provide general operating support.								
1002629 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015								
To support the general operating fund.								
1002746 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015								
To provide unrestricted support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002936 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
St. Jude's Children Research Hospital 501 St. Jude Place Memphis, TN 38015								
To provide support for Leukemia Research.								
1002478 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260								
To provide support for the library and learning/teaching resources.								
1002713 STD	\$0	\$3,750	\$3,750	\$0	\$0	\$0	\$0	\$0
St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260								
To provide for books and general support for the Jean Bepko Library and Education Center.								
1002840 STD	\$0	\$1,562	\$1,562	\$0	\$0	\$0	\$0	\$0
St. Luke's United Methodist Church 100 West 86th Street Indianapolis, IN 46260								
To provide for the garden.								
1002880 STD	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
St. Mary Catholic Parish in Breckenridge P.O. box 2670 Frisco, CO 80443								
To provide for the Capital Campaign.								
1002492 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
St. Matthew Catholic Church 4100 East 56th Street Indianapolis, IN 46220								
To support the Kathleen Lang Hahn Memorial Fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002397 STD	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To provide general operating support.								
1002398 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To support the Heifer International project.								
1002399 STD	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To support activities of the Social Justice Ministry.								
1002597 STD	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201								
To support the general operating fund.								
1002598 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201								
To provide general operating support.								
1002599 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201								
To provide general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002600 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201								
To support social justice ministry.								
1002601 STD	\$0	\$240	\$240	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 E. 13th St. Indianapolis, IN 46201								
To support the Miracle Place Indianapolis sponsoring committee.								
1002765 STD	\$0	\$120	\$120	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To support the Dominican Province of Nigeria.								
1002766 STD	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To provide for the general operating support.								
1002767 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To provide for the general operating support.								
1002768 STD	\$0	\$1,800	\$1,800	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To support the work of our parish and community.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002884 STD	\$0	\$4,050	\$4,050	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To provide for the general support.								
1002547 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204								
To provide general operating support.								
1002821 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204								
To provide for unrestricted general support.								
1002883 STD	\$0	\$6,000	\$6,000	\$0	\$0	\$0	\$0	\$0
Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204								
To provide for the general fund.								
1002658 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Student Press Law Center 1101 Wilson Blvd. Suite 1100 Arlington, VA 22209								
To provide general operating support.								
1002375 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Summit County Family Resource Center PO Box 4056 Dillon, CO 80435								
To support the general fund and annual campaign.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002881 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Summit County Family Resource Center PO Box 4056 Dillon, CO 80435								
To provide for the general support.								
1002688 STD	\$0	\$360	\$360	\$0	\$0	\$0	\$0	\$0
Susan G. Komen Breast Cancer Foundation 205 N. Michigan Avenue Suite 2630 Chicago, IL 60601								
To provide support for Laura Noone's participation in the 3-Day for the Cure in Phoenix, Arizona.								
1002589 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Susan G. Komen for the Cure Central Indiana 3500 DePauw Boulevard Suite 2070 Indianapolis, IN 46268								
To provide breast health services to Indiana residents and support life saving research.								
1002590 STD	\$0	\$855	\$855	\$0	\$0	\$0	\$0	\$0
Susan G. Komen for the Cure Central Indiana 3500 DePauw Boulevard Suite 2070 Indianapolis, IN 46268								
To support general operations.								
1002449 STD	\$0	\$17,500	\$17,500	\$0	\$0	\$0	\$0	\$0
Susquehanna University 514 University Avenue Selinsgrove, PA 17870								
To support educational advancement programs.								
1002642 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Teach for America 315 West 36th Street, 8th floor New York, NY 10018								
To provide support for TFA-Indianapolis Region.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002679 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Teach Plus, Inc. 374 Congress Street Suite 502 Boston, MA 02210								
To provide support for teacher education.								
1002876 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
The ALS Association Indiana Chapter 6525 East 82nd. Street Suite 115 Indianapolis, IN 46250								
To support research for a cure to ALS.								
1002626 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
The Mind Trust 407 N. Fulton Street, Suite 102 Indianapolis, IN 46202								
To provide general support.								
1002977 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
The Salvation Army 736 West Main Street Lexington, KY 40508								
To provide for families in need at Christmas.								
1002580 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
The Trustees of the University of Pennsylvania 433 Franklin Building 3451 Walnut Street Philadelphia, PA 19104-6285								
To honor the reappointment of Dean Mike Fitts.								
1002959 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
The University of Texas MD Anderson Cancer Center PO Box 4486 Houston, TX 77210								
To provide support for Dr. S. O'Brien's Chronic Lymphocytic (CLL) Leukemia Research.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002716 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
The V Foundation 106 Towerview Court Cary, NC 27513								
To provide for the general support.								
1002930 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Think New Mexico 1227 Paseo de Peralta Santa Fe, NM 87501								
To provide general operating support.								
1002357 STD	\$0	\$7,500	\$7,500	\$0	\$0	\$0	\$0	\$0
Thomas Jefferson School of Law 1155 Island Avenue San Diego, CA 92101								
To use at your discretion to expand the new law school building to include faculty and student meeting offices.								
1002503 STD	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
Tidewell Hospice 5955 Rand Boulevard Sarasota, FL 34238								
As a contribution to the Bain Memorial.								
1002617 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Trustees of Dartmouth College 6066 Development Office Hanover, NH 03755								
To support endowments that will be restricted to undergraduate scholarships.								
1002637 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Trustees of Indiana University, The 535 W. Michigan Street, IT 378 Indianapolis, IN 46202								
To provide support for the scholarship fund.								

# **Annual Report Financial Information - 2011** **Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002711 STD	\$0	\$375	\$375	\$0	\$0	\$0	\$0	\$0
Uniform Law Foundation 111 North Wabash Avenue Suite 100 Chicago, IL 60602								
To provide for the general support of the law development work of the Uniform Law Commissioners.								
1002494 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Union Hospital Foundation 1606 North 7th Street Terre Haute, IN 47804								
To support scholarships.								
1002407 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208								
To provide support for scholarships.								
1002512 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208								
To support WeillPoint's (Team Ford) participation in Bowling for Scholars.								
1002518 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
United Negro College Fund 3737 North Meridian Street, Suite 203 Indianapolis, IN 46208								
To provide general support.								
1002415 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201								
To support annual Christmas giving.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002457 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201								
To provide general support.								
1002906 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
United Services Organization, Inc. 2111 Wilson Boulevard, Suite 1200 Arlington, VA 22201								
To support the general fund.								
1002567 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
United States Fund for UNICEF 125 Maiden Lane New York, NY 10038								
To provide support for the Haitian Children's relief fund.								
1002441 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To support the United Christmas Service.								
1002630 STD	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To support contributions to the Julian Center.								
1002654 STD	\$0	\$168	\$168	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To provide support for the Early Readers Club.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
Matching Gift								
1002710 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To provide support for the United Way Campaign.								
1002836 STD	\$0	\$9,833	\$9,833	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To provide general support.								
1002961 STD	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To support designated charities in the United Way Fund.								
1002873 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
United Way of Lee County, Inc. 7273 Concourse Drive Fort Myers, FL 33908								
To support the 2011 annual giving.								
1002321 STD	\$30,000	\$0	\$30,000	\$0	\$0	\$0	\$0	\$0
University of Dubuque 2000 University Avenue Dubuque, IA 52001								
To provide support for the Fine and Performing Arts Center.								
1002641 STD	\$0	\$30,000	\$30,000	\$0	\$0	\$0	\$0	\$0
University of Dubuque 2000 University Avenue Dubuque, IA 52001								
To provide support for the Fine and Performing Arts Center.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002403 STD University of Portland, The 5000 N. Willamette Blvd Portland, OR 97203-5798	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To support educational advancement programs.								
1002563 STD University of Texas at Austin P.O. Box 7458 Austin, TX 78713	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
To support the University of Texas.								
1002802 STD University of Texas at Austin P.O. Box 7458 Austin, TX 78713	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To the Communication College Leadership Program to continue to train future leaders.								
1002909 STD University Schools Foundation P.O. Box 336785 Greeley, CO 80633	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide unrestricted support.								
1002940 STD Upper Valley Land Trust 19 Buck Road Hanover, NH 03755	\$0	\$1,125	\$1,125	\$0	\$0	\$0	\$0	\$0
To provide general support without restriction.								
1002691 STD Vigo County Public Schools Education Foundation, Inc. 686 Wabash Avenue P.O. Box 3703 Terre Haute, IN 47808	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
To provide general support.								

**Annual Report Financial Information - 2011**  
**Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Matching Gift</b>								
1002355 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204								
To provide food and shelter for those in need.								
1002464 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204								
To support any need.								
1002758 STD	\$0	\$75	\$75	\$0	\$0	\$0	\$0	\$0
Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204								
To provide for the general support.								
1002826 STD	\$0	\$300	\$300	\$0	\$0	\$0	\$0	\$0
Wheeler Mission Ministries 205 East New York Street Indianapolis, IN 46204								
To provide for the general operating support.								
1002364 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
White House Fellows Foundation and Association 1800 Massachusetts Avenue, Northwest Suite 400 Washington, DC 20036								
To provide general support without restriction.								
1002707 STD	\$0	\$3,921	\$3,921	\$0	\$0	\$0	\$0	\$0
Wishard Memorial Foundation, Inc. Myers Building - Room 1022 1001 West Tenth Street Indianapolis, IN 46202								
To provide support healthcare for the underserved.								

# **Annual Report Financial Information - 2011** **Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002643 STD Xavier University of Louisiana 1 Drexel Drive New Orleans, LA 70125-1098	\$0	\$15,000	\$15,000	\$0	\$0	\$0	\$0	\$0
To provide support for the chapel at St. Katharine Drexel.								
1002718 STD Yale University Assoc Supervisor, Contribution Processing P.O.Box 2038 New Haven, CT 06521-2038	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
To provide for the general support.								
1002517 STD YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
To support the Ruth Lilly YMCA Outdoor Center and the Y for All Campaign.								
1002371 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 provide general support.								
1002453 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.								

**Annual Report Financial Information - 2011**  
**Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Matching Gift								
1002454 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Young Life								
P.O. Box 520								
Colorado Springs, CO 80901								
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.								
1002513 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Young Life								
P.O. Box 520								
Colorado Springs, CO 80901								
To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to January and February 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.								
1002652 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Young Life								
P.O. Box 520								
Colorado Springs, CO 80901								
To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to January and February 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.								
1002781 STD	\$0	\$225	\$225	\$0	\$0	\$0	\$0	\$0
Young Life								
P.O. Box 520								
Colorado Springs, CO 80901								
To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to May, June, and July 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.								



# **Annual Report Financial Information - 2011** **Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Matching Gift								
1002969 STD	\$0	\$150	\$150	\$0	\$0	\$0	\$0	\$0
Young Life P.O. Box 520 Colorado Springs, CO 80901								
To support Young Life operations in Costa Rica (acct. x8164 /Campbell) as a match to August and September 2011 donations. No part of this gift may be assigned to Ali Campbell's salary or personal benefits.								
Sponsorship - Donate Table	Total for Matching Gift	\$38,250	\$1,304,006	\$1,334,006	\$0	\$7,500	\$0	\$750
1002576 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
American Cancer Society Great Lakes Division, Inc Central Indiana Service Center 5635 West 96th Street Indianapolis, IN 46278								
To support the 2011 Westfield Relay for Life.								
1002463 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
American Heart Association 6100 W. 96th Street Indianapolis, IN 46278								
To support the American Heart Association's Jump Rope for Heart event to be held on February 14, 2011 at Charles L. Smith Elementary School, sponsoring Robbie Morales.								
1002772 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
American Indian College Fund 8333 Greenwood Boulevard Denver, CO 80221								
To support the 2011 Annual Flame of Hope Gala.								
1002762 STD	\$0	\$600	\$600	\$0	\$0	\$0	\$0	\$0
Arts Council of Indianapolis, Inc. 924 North Pennsylvania Street Indianapolis, IN 46204								
To support the 25th Annual Start with Art Business and Arts Luncheon, Paint the Town, on September 1, 2011.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002479 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Association Venezolanos En Indiana Corporation P.O. Box 3100 Carmel, IN 46032								
To sponsor the Venezuelan Association Gala Party that will be held on May 14, 2011.								
1002721 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Ball State University Social Science Research Center Ball State University Muncie, IN 47306								
To sponsor Guardian Scholars' Welcome Back to School reception in September 2011.								
1002504 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Brotherhood/Sister Sol Incorporated 512 West 143rd Street New York, NY 10031								
To support the 2nd annual educational panel on March 29, 2011.								
1002756 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Carmel Education Foundation 5201 East Main Street Carmel, IN 46033								
To support the 3rd Annual Ghosts and Goblins 5K/2K and Wellness fair on Saturday, October 29, 2011.								
1002434 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546								
To support the Minority Business and Professional Achievers Recognition Awards Dinner on March 16, 2011								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002624 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Center for Leadership Development, Inc. 2425 Dr. Martin Luther King Jr. Street Indianapolis, IN 46208-5546								
To support the 4th Annual CLD College Prep Conference and College Fair on July 23, 2011.								
1002720 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Central Indiana Community Foundation 615 N Alabama St., Suite 119 Indianapolis, IN 46204								
To support the Indiana Latino Scholarship Fund Dinner held on July 29, 2011.								
1002610 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Coalition of Urban and Metropolitan Universities 8000 York Road Towson, MD 21252								
To support the 17th Annual Conference at the Silver level in recognition of IUPUI and other CUMU institutions as key partners in success work.								
1002869 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Community Alliance of the Far Eastside, Inc. 8902 East 38th Street Indianapolis, IN 46226								
To support the CAFE Annual Dinner/Far Eastside's Got Talent on November 17, 2011.								
1002682 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Community Foundation of Morgan County								
To support OneRoad Back to School 2011.								
1002882 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Community Foundation of Morgan County								
To support the OneRoad to Christmas Morning 2011 campaign.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002585 STD	\$0	\$850	\$850	\$0	\$0	\$0	\$0	\$0
Dyslexia Institute of Indiana, Inc. 8395 Keystone Crossing, Suite 102 Indianapolis, IN 46240								
To support the annual Indiana Authors Breakfast.								
1002437 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Emerging Pearls Foundation, Inc. P.O. Box 44004 Indianapolis, IN 46244								
For general sponsorship.								
1002941 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Emerging Pearls Foundation, Inc. P.O. Box 44004 Indianapolis, IN 46244								
To support the 2011 Books & Breakfast with Santa literacy initiative.								
1002532 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Fathers and Families Resource/Research Center, Inc. 2835 N. Illinois Street Indianapolis, IN 46208								
To support the Annual Faces of Fatherhood Luncheon.								
1002751 STD	\$0	\$200	\$200	\$0	\$0	\$0	\$0	\$0
Fathers and Families Resource/Research Center, Inc. 2835 N. Illinois Street Indianapolis, IN 46208								
To support Fatherhood Luncheon June 2012.								
1002983 STD	\$0	\$5,000	\$0	\$0	\$0	\$0	\$0	\$5,000
Grantmakers for Effective Organizations 1725 DeSales Street Suite 404 Washington, DC 200036								
To provide general support for the conference and offsetting attendance costs for new practitioners.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Sponsorship - Donate Table</b>								
1002896 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Greater Indianapolis Progress Committee 200 East Washington Street, Suite 1901 Indianapolis, IN 46204								
To provide support for the Mayor's Celebration for Diversity Awards Luncheon on Friday, January 11, 2012.								
1002488 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
Habitat for Humanity International, Inc. P O Box 1252 1011 E. 22nd Street Indianapolis, IN 46206-1252								
To support the Homeowner Education Program and construction projects in Center Township.								
1002521 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Indiana Black Exp, Inc. 3145 North Meridian Street Indianapolis, IN 46208								
To support Indiana Black Expo's Fourth Annual Statewide Education Conference July 13-14, 2011.								
1002536 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Indiana Black Expo, Inc. 3145 North Meridian Street Indianapolis, IN 46208								
To support Circle City Classic 2011.								
1002450 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Indiana Partnerships Center 921 East 86th Street, Suite 108 Indianapolis, IN 46240								
To support the Dads Expo event that will be held on May 21, 2011.								

# Annual Report Financial Information - 2011 Special Gifts

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
Sponsorship - Donate Table								
1002823 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Indiana State Fair Commission Administration Building 1202 East 38th Street Indianapolis, IN 46205								
To provide support for the 16th annual Safe Night Halloween Trunk or Treat event on October 31, 2011.								
1002847 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Indianapolis Downtown, Inc. Chase Tower 111 Monument Circle, Suite 1900 Indianapolis, IN 46204								
To support Downtown Indianapolis 2011 efforts.								
1002867 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Indianapolis Professional Association P.O. Box 20712 Indianapolis, IN 46220								
To provide support for the 2011 IPA's Annual Youth Empowerment Breakfast on December 11, 2011.								
1002948 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Indianapolis Public Schools 2405 Madison Avenue Indianapolis, IN 46225								
To support the Manual High School Band Department.								
1002868 STD	\$0	\$2,000	\$2,000	\$0	\$0	\$0	\$0	\$0
John H. Boner Community Center, Inc. 2236 East 10th Street Indianapolis, IN 46201								
To provide support for John H. Boner Community Center's Big Birthday Bash on November 12, 2011.								
1002741 STD	\$0	\$250	\$250	\$0	\$0	\$0	\$0	\$0
John H. Bonner Center 7254 Haverhill Court Indianapolis, IN 46250								
To support parents finding non-costly ways to prepare their child for the first day of school.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002973 STD	\$0	\$4,000	\$4,000	\$0	\$0	\$0	\$0	\$0
Juvenile Diabetes Research Foundation 26 Broadway New York, NY 10004								
To provide general support.								
1002524 STD	\$0	\$245	\$245	\$0	\$0	\$0	\$0	\$0
Kids Wish Network, Inc. P.O. Box 91859 Orlando, FL 32891-8959								
To support the Kids Wish Network's Funeral Assistance Program in Indiana.								
1002537 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
La Plaza, Inc. 8902 East 38th Street Indianapolis, IN 46226								
To support La Plaza's 6th Annual Night of the Americas event.								
1002841 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Madame Walker Theatre Center 617 Indiana Avenue, # 4 Indianapolis, IN 46202								
To support the Steward and Associates 2011/2012 Speaker Series.								
1002531 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Marion County Commission on Youth, Inc. 3901 North Meridian Indianapolis, IN 46208								
To support the formation of a Youth Advocacy Council.								
1002857 STD	\$0	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0
Metropolitan Indianapolis Public Broadcasting 1630 North Meridian Street, Suite 2105 Indianapolis, IN 46202-1437								
To support the WFYI challenge grant for the 2011 Fall Membership Campaign.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
<b>Sponsorship - Donate Table</b>								
1002824 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Metropolitan Schood District of Wayne Township								
3820 West Bradbury Avenue								
Indianapolis, IN 46241								
To recreate a learning opportunity for the 2011-2012 school year by having Mr. Nick Bruel, the creator of the series, Bad Kitty, present to the students.								
1002625 STD	\$0	\$414	\$414	\$0	\$0	\$0	\$0	\$0
Pacer's Basketball Corporation Foundation								
125 South Pennsylvania Street								
Indianapolis, IN 46204								
To provide 40 tickets to underserved youth to attend a Fever game at Conseco Fieldhouse in honor of Colleen O'Brien.								
1002467 STD	\$0	\$1,200	\$1,200	\$0	\$0	\$0	\$0	\$0
Perry Township Education Foundation, Inc.								
6548 Orinoco Avenue								
Indianapolis, IN 46227								
To support the 2011 PTFF Golf Outing that will be held on June 16, 2011.								
1002468 STD	\$0	\$3,000	\$3,000	\$0	\$0	\$0	\$0	\$0
Planned Parenthood of Indiana, Inc.								
200 South Meridian Street, Suite 400								
P.O. Box 397								
Indianapolis, IN 46206								
To sponsor the Gathering of Goddesses and Gods events that will be held on April 16, 2011.								
1002609 STD	\$0	\$1,750	\$1,750	\$0	\$0	\$0	\$0	\$0
Roman Catholic Archdiocese of Indianapolis								
1400 N. Meridian Street								
Indianapolis, IN 46202-2367								
To support the Celebrating Catholic School Values: Scholarship and Career Achievement Awards Dinner at the Bronze level. This gift is given in recognition of service to your organization by Holiday H. McKiernan, an officer of Lumina Foundation.								



# **Annual Report Financial Information - 2011** **Special Gifts**

<i>Theme</i>	<i>Begin Balance</i>	<i>Awards</i>	<i>Payments</i>	<i>PY Rescissions</i>	<i>CY Rescissions</i>	<i>Grant Returns</i>	<i>Transfers</i>	<i>End Balance</i>
Sponsorship - Donate Table								
1002784 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Rural Community College Alliance 2801 North Main Street Altus, OK 73521								
To support the Rural Community College Alliance Conference on September 26-28, 2011 in Oklahoma City.								
1002466 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To support the local Salvation Army Social Services Center and Shelter, in honor of Brownie Troop 2454.								
1002822 STD	\$0	\$500	\$500	\$0	\$0	\$0	\$0	\$0
Salvation Army, The 3100 North Meridian Street Indianapolis, IN 46208								
To support the 2011 Bob Gregory's Coats for Kids campaign.								
1002438 STD	\$0	\$1,700	\$1,700	\$0	\$0	\$0	\$0	\$0
Scholarship America, Inc. P.O. Box 3402 Evansville, IN 47733								
To support the 2nd Annual Strawberries & Champagne Gala & Silent Auction that will be held on February 12, 2011.								
1002752 STD	\$0	\$750	\$750	\$0	\$0	\$0	\$0	\$0
Sociedad Amigos De Colombia De Indiana Inc. P.O. Box 1141 Carmel, IN 46082								
To support the SADCO 27th Anniversary Sponsorship Program.								

**Annual Report Financial Information - 2011  
Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002522 STD	\$0	\$540	\$540	\$0	\$0	\$0	\$0	\$0
Special Olympics of Indiana 9425 North Meridian Street #237 Department # 11329 Indianapolis, IN 46260								
To support Indiana's Special Olympics program.								
1002523 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
St. Therese (Little Flower) Catholic Church 4720 East 13th Street Indianapolis, IN 46201								
To support Summerfest 2011 at Little Flower Catholic Church.								
1002381 STD	\$0	\$5,000	\$5,000	\$0	\$0	\$0	\$0	\$0
Starfish Initiative 814 North Delaware Street, Suite A Indianapolis, IN 46204								
To support the Starfish Initiative Back to School Expo that will be held on 7/30/11.								
1002660 STD	\$0	\$2,500	\$2,500	\$0	\$0	\$0	\$0	\$0
Trustees of Indiana University, The 719 Indiana Avenue, Suite 130 Indiana, IN 46202								
To support the 12th Annual Indiana Achievement Awards on September 28, 2011.								
1002588 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Vigo County Public Schools Education Foundation, Inc. 686 Wabash Avenue P.O. Box 3703 Terre Haute, IN 47808								
To support the 25th annual Vigo County Education Foundation "Excellence in Education" banquet on May11, 2011.								

# **Annual Report Financial Information - 2011** **Special Gifts**

<b>Theme</b>	<b>Begin Balance</b>	<b>Awards</b>	<b>Payments</b>	<b>PY Rescissions</b>	<b>CY Rescissions</b>	<b>Grant Returns</b>	<b>Transfers</b>	<b>End Balance</b>
<b>Sponsorship - Donate Table</b>								
1002770 STD	\$0	\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0
YMCA of Greater Indianapolis 615 N. Alabama Street Suite 200 Indianapolis, IN 46204								
To support the 2011 Y-Achievers Scholarship Banquet on behalf of Meresa Creekmore-Armor.								
<b>Total for Sponsorship - Donate Table</b>	<b>\$0</b>	<b>\$123,249</b>	<b>\$118,249</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$5,000</b>
<b>United Way Lumina Match</b>								
1003072 STD	\$0	\$64,482	\$64,482	\$0	\$0	\$0	\$0	\$0
United Way of Central Indiana, Inc. 3901 North Meridian Indianapolis, IN 46208								
To pay Lumina's corporate match for the 2011 United Way Campaign.								
<b>Total for United Way Lumina Match</b>	<b>\$0</b>	<b>\$64,482</b>	<b>\$64,482</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>VIP Gift</b>								
1002579 STD	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
Coburn Place Safehaven II, Inc. 604 East 38th Street Indianapolis, IN 46205								
To provide safe affordable housing for women and children.								
<b>1002656 STD</b>	<b>\$0</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Eastern Star Missionary Baptist Church dba New Horizon Church 5750 East 30th Street Indianapolis, IN 46218								
To provide support for Growing in God-Giving in Faith Capital Stewardship Program.								
<b>1002944 STD</b>	<b>\$0</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Families First 615 North Alabama Street Suite 320 Indianapolis, IN 46204-1481								
To provide for general support.								

# **Annual Report Financial Information - 2011** **Special Gifts**

Theme	Begin Balance	Awards	Payments	PY Rescissions	CY Rescissions	Grant Returns	Transfers	End Balance
<b>VIP Gift</b>								
1002476 STD First Christian Church of Bangersville P.O. Box 15 101 East Street Bangersville, IN 46106	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide support where needed.								
<b>1002365 STD</b>								
Indianapolis Zoological Society 1200 West Washington Street P.O. Box 22309 Indianapolis, IN 46222	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general support.								
<b>1002595 STD</b>								
Information and Referral Network, Inc 3901 North Meridian Street, Suite 300 Indianapolis, IN 46208	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide support where needed.								
<b>1002613 STD</b>								
Scholarship America P. O. Box 1044 Bloomington, IN 47402	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To support programmatic and scholarship efforts.								
<b>1002653 STD</b>								
Student Press Law Center 1101 Wilson Blvd. Suite 1100 Arlington, VA 22209	\$0	\$1,000	\$1,000	\$0	\$0	\$0	\$0	\$0
To provide general operating support.								
Total for VIP Gift	\$0	\$8,000	\$8,000	\$0	\$0	\$0	\$0	\$0
Total for Standard Special Gifts	\$38,250	\$1,811,237	\$1,836,237	\$0	\$7,500	\$0	\$0	\$5,750
Grand Total	\$38,250	\$1,811,237	\$1,836,237	\$0	\$7,500	\$0	\$0	\$5,750

Lumina Foundation For Education  
Tax Return for Year Ending

December 31, 2011

Tax ID 35-1813228

Form 990 PF

Statement Number 19

Part I Line 19

Depreciation

		(A)	(B)	(C)	(D)
Description		Expense per books	Net Investment Expense	Adjusted Net Income	Disbursements for charitable purposes (cash basis only)
Asset Life (Years)					
Computer Equipment	3	\$ 134,050	\$ 11,071	\$ 0	0
Furniture and Equipment	5-10	111,135	9,181	0	0
Leasehold Improvements	10 years (Term of lease )	387,129	31,970	0	0
		\$ <u>632,314</u>	\$ <u>52,222</u>	\$ <u>0</u>	\$ <u>0</u>

<b>Lumina Foundation For Education</b>		<b>Tax Return for Year Ending</b>		<b>Tax ID 35-1813228</b>	
		<b>December 31, 2011</b>			
<b>Form 990 PF</b>					
<b>Part IV</b>	<b>Line 1</b>	<b>Capital Gain and Losses for Tax on Investment Income</b>			<b>Statement Number 20</b>

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				\$ 548,718,000		\$ 33,679,144
K - 1 Gains				N/A		6,696,755
Total				<u>\$ 548,718,000</u>		<u>\$ 40,375,899</u>

**Lumina Foundation For Education**

**Tax ID 35-1813228**

**Tax Return for Year Ending**

**December 31, 2011**

**Form 990 PF**

**Part VII-A Line 11**

**Statement Regarding Activity**

**Statement Number 21**

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	0
Lumina Investments LLC is the General Partner in SCHF I-3.	20-3405024	Cash Investment	0
Lumina Foundation for Education, Inc. is a limited Partner in SCHF I-3			

Lumina Foundation For Education					Tax ID 35-1813228	
Form 990 PF		Tax Return for Year Ending			December 31, 2011	
		Expenditure Grants			Statement Number 22	
Part VII-B		Line 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
CommunicationWorks, LLC 1752 N Street, Northwest, 6th Floor Washington, DC 20036	\$ 900,000	6/1/2010	To develop communicatin activities and products that strengthen the ability of states to graduate more students within existing resources while maintaining academic quality.	\$352,117	No	Interm reports - 1st 02/02/2011; 2nd report 9/30/2011; Did not disburse final \$200,000, close grant 6/30/12. Receive unspent refund 4/30/11 \$163,986	Reviewed and approved interim reports	\$700,000 of grant disbursed 06/04/2010; Additional \$100,000 scheduled for August 2011 and final \$100,000 scheduled for August 2012 These disbursement not made.
HCM Strategists, LLC 429 3rd Street, Northeast Washington, DC 20001	\$ 2,829,500	7/7/2010	To manage state contracts and coordinate technical support for Lumina Foundation's productivity initiative	\$760,210	No	Interm reports - 1st 02/28/2011; 2nd interm report 1/31/12	Reviewed and approved interim reports	\$327,300 of grant distursed 7/30/2010; Modified disbursement scheduled as follows: 02/2011 - \$387,000; 8/2011 - \$389,200; 03/2012 - 837,000 and final 01/2013 - \$889,000.
Mathematica Policy Research 600 Maryland Avenue, Southwest Suite 550 Washington, DC 20024	\$ 350,000	6/11/2011	To continue the process and summative evaluation of Lumina's Minority Serving Institutions - Models of Success (MSI-MS) program	86,285	no		Reviewed and approved interim reports	\$275,000 disbursed 06/11/2011; Remaing \$75,000 scheduled for 4/30/2012