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

OMB No 1545-0052

**2002**Department of the Treasury  
Internal Revenue Service

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

For calendar year 2002, or tax year beginning **Jul 1**, 2002, and ending **Jun 30**, 2003

**G** Check all that apply: ☐ Initial return ☐ Final return ☒ ~~Section 501(c)(3) exempt private foundation~~ ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of organization <b>ACHIEVE, INC.</b>		<b>A</b> Employer identification number <b>52-2006429</b>
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	<b>B</b> Telephone number (see instructions) <b>(202) 624-1460</b>
	400 NORTH CAPITOL STREET, N.W.	351	
	City or town <b>WASHINGTON</b>	State ZIP code <b>DC 20001</b>	
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			<b>C</b> If exemption application is pending, check here <input type="checkbox"/> <b>D 1</b> Foreign organizations, check here <input type="checkbox"/> <b>2</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, column c, line 16) <b>\$ 2,096,289.</b>		<b>J</b> Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column d must be on cash basis.)</i>	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns b, c, and d may not necessarily equal the amounts in column a.) (see instructions)</i>		(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>	<b>1</b> Contributions, gifts, grants, etc. received (att sch) Ck <input type="checkbox"/> if the foundn is not req to att Sch B	1,802,078.			
	<b>2</b> Distributions from split-interest trusts				
	<b>3</b> Interest on savings and temporary cash investments	14,123.	14,123.	14,123.	
	<b>4</b> Dividends and interest from securities				
	<b>5a</b> Gross rents <b>b</b> (Net rental income or (loss) _____)				
	<b>6a</b> Net gain/(loss) from sale of assets not on line 10 <b>b</b> Gross sales prices for all assets on line 6a				
	<b>7</b> Capital gain net income (from Part IV, line 2)				
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances <b>b</b> Less Cost of goods sold				
	<b>c</b> Gross profit/(loss) (att sch)				
	<b>11</b> Other income (attach schedule)				
<b>12 Total.</b> Add lines 1 through 11	1,816,201.	14,123.	14,123.		
<b>ADMINISTRATIVE AND OPERATING EXPENSES</b>	<b>13</b> Compensation of officers, directors, trustees, etc.				
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule) <b>b</b> Accounting fees (attach sch) <b>c</b> Other prof fees (attach sch) L-16c Stmt	115,513.			
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule)				
	<b>19</b> Depreciation (attach schedule) and depletion	25,017.			
	<b>20</b> Occupancy	176,098.			
	<b>21</b> Travel, conferences, and meetings	444,304.			
	<b>22</b> Printing and publications	52,502.			
	<b>23</b> Other expenses (attach schedule) See Line 23 Stmt	3,658,740.			
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	4,472,174.			
	<b>25</b> Contributions, gifts, grants paid				
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	4,472,174.			
<b>27 Subtract line 26 from line 12:</b> <b>a Excess of revenue over expenses and disbursements</b> <b>b Net investment income</b> (if negative, enter -0-) <b>c Adjusted net income</b> (if negative, enter -0-)	-2,655,973.	14,123.	14,123.		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
ASSETS	1	Cash — non-interest-bearing . . . . .		42,955.			
	2	Savings and temporary cash investments . . . . .		1,640,350.	677,585.	677,585.	
	3	Accounts receivable . . . . .					
		Less: allowance for doubtful accounts ▶ . . . . .		35,657.			
	4	Pledges receivable . . . . .					
		Less: allowance for doubtful accounts ▶ . . . . .					
	5	Grants receivable . . . . .		2,958,095.	1,332,000.	1,332,000.	
	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 . . . . .		2,823.	2,823.	2,823.	
	10a	Investments — U.S. and state government obligations (attach schedule)					
	b	Investments — corporate stock (attach schedule)					
	c	Investments — corporate bonds (attach schedule)					
	LIABILITIES	11	Investments — land, buildings, and equipment: basis . . . . .				
		Less: accumulated depreciation (attach schedule) ▶ . . . . .					
12		Investments — mortgage loans . . . . .					
13		Investments — other (attach schedule) . . . . .					
14		Land, buildings, and equipment: basis ▶ . . . . . 206,957.					
		Less: accumulated depreciation (attach schedule) ▶ . . . . . 140,102.		102,427.	66,855.	66,855.	
15		Other assets (describe ▶ SECURITY DEPOSIT . . . . .)		17,026.	17,026.	17,026.	
16		<b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item I)		4,799,333.	2,096,289.	2,096,289.	
17		Accounts payable and accrued expenses . . . . .		309,648.	262,577.		
18		Grants payable . . . . .					
FUND ASSETS OR BALANCES	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)		309,648.	262,577.		
FUND ASSETS OR BALANCES	Organizations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>						
	24	Unrestricted . . . . .		1,531,590.	501,712.		
	25	Temporarily restricted . . . . .		2,958,095.	1,332,000.		
	26	Permanently restricted . . . . .					
	Organizations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>						
	27	Capital stock, trust principal, or current funds . . . . .					
	28	Paid-in or capital surplus, or land, building, and equipment fund . . . . .					
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .					
	30	<b>Total net assets or fund balances</b> (see instructions)		4,489,685.	1,833,712.		
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions)		4,799,333.	2,096,289.		

## 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	4,489,685.
2	Enter amount from Part I, line 27a . . . . .	2	-2,655,973.
3	Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4	Add lines 1, 2, and 3 . . . . .	4	1,833,712.
5	Decreases not included in line 2 (itemize) ▶ . . . . .	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	1,833,712.

**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				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))	
(j) Fair Market Value as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of column (i) over column (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss). <span style="float:right">[ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 ]</span>			2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). <span style="float:right">[ If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 ]</span>			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 organization liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see 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))
2001			
2000			
1999			
1998			
1997			
2 Total of line 1, column (d)			2
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
4 Enter the net value of noncharitable-use assets for 2002 from Part X, line 5			4
5 Multiply line 4 by line 3			5
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7
8 Enter qualifying distributions from Part XII, line 4			8

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)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling letter _____ (attach copy of ruling letter if necessary – see instructions)		1	282.
b Domestic organizations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic organizations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		3	282.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	282.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments.		6c	
a 2002 estimated tax pmts and 2001 overpayment credited to 2002		6d	
b Exempt foreign organizations – tax withheld at source		7	
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	282.
7 Total credits and payments. Add lines 6a through 6d		10	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		11	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount on line 10 to be: Credited to 2003 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the organization 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 instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the organization in connection with the activities</i>		X
c Did the organization 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 organization <input type="checkbox"/> \$ _____ (2) On organization managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization managers <input type="checkbox"/> \$ _____		
2 Has the organization engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the organization made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4a Did the organization 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? <i>If 'Yes,' attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the organization have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) DELAWARE, MASSACHUSETTS, WASHINGTON, D.C.		
b If the answer is 'Yes' to line 7, has the organization furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>	X	
9 Is the organization claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2002 or the taxable year beginning in 2002 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>	X	
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>	X	
11 Did the organization comply with the public inspection requirements for its annual returns and exemption application? Web site address _____	X	
12 The books are in care of <input type="checkbox"/> THE ORGANIZATION Telephone no <input type="checkbox"/> (202) 624-1460 Located at <input type="checkbox"/> 400 N. CAPITAL STREET, NW., SUITE 351, WDC ZIP + 4 <input type="checkbox"/> 20001		
13 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <input type="checkbox"/> 13		

**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.

**1a** During the year did the organization (either directly or indirectly).(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ No(6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the organization agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ 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)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** Did the organization 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 2002?**2** Taxes on failure to distribute income (section 4942) (does not apply for years the organization was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):**a** At the end of tax year 2002, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2002? ☐ Yes ☒ NoIf 'Yes,' list the years ☐ 20\_\_ , 20\_\_ , 19\_\_ , 19\_\_ .**b** Are there any years listed in 2a for which the organization is **not** 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)**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\_\_ , 19\_\_ , 19\_\_ .**3a** Did the organization hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No**b** If 'Yes,' did it have excess business holdings in 2002 as a result of (1) any purchase by the organization 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 organization had excess business holdings in 2002*)**4a** Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes?**b** Did the organization 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 2002?**5a** During the year did the organization 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)? ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is 'Yes' to question 5a(4), does the organization claim exemption from the tax because it maintained expenditure responsibility for the grant?If 'Yes,' attach the statement required by Regulations section 53.4945-5(d). ☐ Yes ☐ No**6a** Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?If you answered 'Yes' to 6b, also file 8870 ☐ Yes ☒ No

**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
ROBERT SCHWARTZ 30 LAKE AVE, NEWTON CENTER MA 02159	PRESIDENT 40 HRS	92,213.	15,647.	0.

**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
JEAN SLATTERY MERCER ISLAND, WA 98040	VP CORP. AFFAIRS 40 HRS	119,475.	10,400.	0.
MATTHEW GANDAL CHEVY CHASE, MD 20815	VP D.C. OFFICE 40 HRS	143,725.	13,494.	0.
RONN ROBINSON MERCER ISLAND, WA 98040	DIR- BENCHMARKING 40 HRS	142,500.	13,494.	0.
JOANNE ERESH ROCKVILLE, MA 20850	SR ASSOC-BENCHMARKING 40 HRS	94,000.	9,100.	0.

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

NONE

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SHEILA A. BYRD MASS.	EDUCATIONAL CONSULTING	122,387.

Total number of others receiving over \$50,000 for professional services

NONE

**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 BENCHMARKING STANDARDS	757,584.
2 MATHEMATICS ACHIEVEMENT PARTNERSHIP	1,160,590.
3 PUBLIC LEADERSHIP	555,581.
4 AMERICAN DIPLOMA PROJECT	860,256.

**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 _____ _____	
2 _____ _____	
All other program-related investments. See instructions.	
3 _____ _____	
<b>Total.</b> Add lines 1 through 3	

**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
b Average of monthly cash balances	1b 243,513.
c Fair market value of all other assets (see instructions)	1c 1,418,704.
d Total (add lines 1a, b and c)	1d 1,662,217.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e
2 Acquisition indebtedness applicable to line 1 assets	2 0.
3 Subtract line 2 from line 1d	3 1,662,217.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4 24,933.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 1,637,284.
6 Minimum investment return. Enter 5% of line 5	6 81,864.

**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
2a Tax on investment income for 2002 from Part VI, line 5	2a	
b Income tax for 2002 (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b		2c
3 Distributable amount before adjustments. Subtract line 2c from line 1		3
4a Recoveries of amounts treated as qualifying distributions	4a	
b Income distributions from section 4947(a)(2) trusts	4b	
c Add lines 4a and 4b		4c
5 Add lines 3 and 4c		5
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

**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 4,447,157.
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
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 4,447,157.
5 Organizations 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
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 4,447,157.

**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 2001	(c) 2001	(d) 2002
1 Distributable amount for 2002 from Part XI, line 7				0.
2 Undistributed income, if any, as of the end of 2001:				
a Enter amount for 2001 only				
b Total for prior years: 20____, 19____, 19____				
3 Excess distributions carryover, if any, to 2002:				
a From 1997				
b From 1998				
c From 1999				
d From 2000				
e From 2001				
f Total of lines 3a through e				
4 Qualifying distributions for 2002 from Part XII, line 4. ▶ \$ 4,447,157.				
a Applied to 2001, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2002 distributable amount				
e Remaining amount distributed out of corpus	4,447,157.			
5 Excess distributions carryover applied to 2002 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	4,447,157.			
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				
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2001. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2002. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2003				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 1997 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2003. Subtract lines 7 and 8 from line 6a	4,447,157.			
10 Analysis of line 9:				
a Excess from 1998	0.			
b Excess from 1999	0.			
c Excess from 2000	0.			
d Excess from 2001	0.			
e Excess from 2002	4,447,157.			

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

**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 2002, enter the date of the ruling

**b** Check box to indicate whether the organization is a private operating foundation described in section ☒ 4942(j)(3) or ☐ 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				
(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total	
14,123.	29,945.	34,442.	5,628.	84,138.	

**b** 85% of line 2a

12,005.	25,453.	29,276.	4,784.	71,518.	
---------	---------	---------	--------	---------	--

**c** Qualifying distributions from Part XII, line 4 for each year listed

4,447,157.	4,784,606.	3,712,335.	3,247,234.	16,191,332.	
------------	------------	------------	------------	-------------	--

**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

4,447,157.	4,784,606.	3,712,335.	3,247,234.	16,191,332.	
------------	------------	------------	------------	-------------	--

**3** Complete 3a, b, or c for the alternative test relied upon:

**a** 'Assets' alternative test — enter:

(1) Value of all assets

2,096,289.	4,799,333.	9,395,220.	5,562,662.	21,853,504.	
------------	------------	------------	------------	-------------	--

(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.)**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 organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the organization 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:

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

N/A

**c** Any submission deadlines

N/A

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

N/A

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
<b>a</b> Paid during the year				
<b>Total</b>			<b>3 a</b>	
<b>b</b> Approved for future payment				
<b>Total</b>			<b>3 b</b>	

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see instructions)
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	14,123.	
4	Dividends and interest from securities					
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue.					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				14,123.	
13	Total. Add line 12, columns (b), (d), and (e)				14,123.	

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

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

[illegible]



**Schedule B**  
**(Form 990, 990-EZ,**  
**or 990-PF)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

**Supplementary information for**  
**line 1 of Form 990, 990-EZ and 990-PF (see instructions)**

OMB No 1545-0047

**2002**

Name of organization

ACHIEVE, INC.

Employer identification number

52-2006429

**Organization type** (check one):

**Filers of:**

Form 990 or 990-EZ

**Section:**

- ☐ 501(c)(\_\_\_\_) (enter number) organization  
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation  
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation  
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation  
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**. (**Note:** Only a section 501(c)(7), (8), or (10) organization can check box(es) for both the General Rule and a Special Rule — see instructions.)

**General Rule —**

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

**Special Rules —**

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of \$5,000 or 2% of the amount on line 1 of these forms (Complete Parts I and II.)
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. (Complete Parts I, II, and III.)
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose. Do not complete any of the Parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc, contributions of \$5,000 or more during the year ) .. .. . ► \$ \_\_\_\_\_

**Caution:** Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF) but **must** check the box in the heading of their Form 990, Form 990-EZ, or on line 1 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**BAA For Paperwork Reduction Act Notice, see the instructions for Form 990 and Form 990-EZ.**

Schedule **B** (Form 990, 990-EZ, or 990-PF) (2002)

**Underpayment of Estimated Tax by Corporations**

► See separate instructions.  
► Attach to the corporation's tax return.

**2002**

Name **ACHIEVE, INC.** Employer identification number **52-2006429**

**Note:** In most cases, the corporation **does not** need to file Form 2220. (See Part I below for exceptions.) The IRS will figure any penalty owed and bill the corporation. If the corporation does not need to file Form 2220, it may still use it to figure the penalty. Enter the amount from line 34 on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.

**Part I Reasons for Filing** — Check the boxes below that apply to the corporation. If any boxes are checked, the corporation must file Form 2220, even if it does not owe the penalty. If the box on line 1 or line 2 applies, the corporation may be able to lower or eliminate the penalty.

- 1 ☐ The corporation is using the annualized income installment method.  
 2 ☐ The corporation is using the adjusted seasonal installment method.  
 3 ☐ The corporation is a 'large corporation' figuring its first required installment based on the prior year's tax

**Part II Figuring the Underpayment**

- 4 Total tax (see instructions) **4** **282.**
- 5a Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 4 **5 a**
- b Look-back interest included on line 4 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method **5 b**
- c Credit for Federal tax paid on fuels (see instructions) **5 c**
- d Total. Add lines 5a through 5c **5 d**
- 6 Subtract line 5d from line 4. If the result is less than \$500, **do not** complete or file this form. The corporation does not owe the penalty **6** **282.**
- 7 Enter the tax shown on the corporation's 2001 income tax return (see instructions) **Caution: If zero or the tax year was for less than 12 months, skip this line and enter the amount from line 6 on line 8.** **7**
- 8 Enter the **smaller** of line 6 or line 7. If the corporation is required to skip line 7, enter the amount from line 6 **8**

9 **Installment due dates.** Enter in columns (a) through (d) the 15th day of the 4th (Form 990 — PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year.

10 **Required installments.** If the box on line 1 and/or line 2 above is checked, enter the amounts from Schedule A, line 40. If the box on line 3 (but not 1 or 2) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% of line 8 above in each column.

11 Estimated tax paid or credited for each period (see instructions). For column (a) only, enter the amount from line 11 on line 15.

**Complete lines 12 through 18 of one column before going to the next column.**

12 Enter amount, if any, from line 18 of the preceding column.

13 Add lines 11 and 12.

14 Add amounts on lines 16 and 17 of the preceding column.

15 Subtract line 14 from line 13. If zero or less, enter -0-

16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-.

17 **Underpayment.** 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.

18 **Overpayment.** If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column.

	(a)	(b)	(c)	(d)
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

**Complete Part III on page 2 to figure the penalty. If there are no entries on line 17, no penalty is owed.**

**BAA For Paperwork Reduction Act Notice, see separate instructions.**

Form **2220** (2002)

**Part III 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). <i>(Form 990-PF and Form 990-T filers: Use 5th month instead of 3rd month.)</i>	<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 4/15/2002 and before 1/1/2003	<b>21</b>			
<b>22</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 21}}{365} \times 6\%$	<b>22</b>			
<b>23</b> Number of days on line 20 after 12/31/2002 and before 4/1/2003	<b>23</b>			
<b>24</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 23}}{365} \times 5\%$	<b>24</b>			
<b>25</b> Number of days on line 20 after 3/31/2003 and before 7/1/2003	<b>25</b>			
<b>26</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 25}}{365} \times \text{ } \%$	<b>26</b>			
<b>27</b> Number of days on line 20 after 6/30/2003 and before 10/1/2003	<b>27</b>			
<b>28</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 27}}{365} \times \text{ } \%$	<b>28</b>			
<b>29</b> Number of days on line 20 after 9/30/2003 and before 1/1/2004	<b>29</b>			
<b>30</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 29}}{365} \times \text{ } \%$	<b>30</b>			
<b>31</b> Number of days on line 20 after 12/31/2003 and before 2/16/2004	<b>31</b>			
<b>32</b> Underpayment on line 17 $\times$ $\frac{\text{Number of days on line 31}}{366} \times \text{ } \%$	<b>32</b>			
<b>33</b> Add lines 22, 24, 26, 28, 30, and 32	<b>33</b>			
<b>34 Penalty.</b> Add columns (a) through (d), of line 33. Enter the total here and on Form 1120, line 33; Form 1120-A, line 29, or the comparable line for other income tax returns	<b>34</b>			

**\*For underpayments paid after March 31, 2003:** For lines 26, 28, 30, and 32, 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 Web Site at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-1040 to get interest rate information.

Form **4562**Department of the Treasury  
Internal Revenue Service**Depreciation and Amortization**  
(Including Information on Listed Property)▶ See separate instructions.  
▶ Attach to your tax return.

OMB No 1545-0172

**2002****67**

Name(s) shown on return

ACHIEVE, INC.

Identifying number

52-2006429

Business or activity to which this form relates

Form 990-PF page 1

**Part I Election To Expense Certain Tangible Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount. See instructions for a higher limit for certain businesses	1	\$24,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	\$200,000.
4	Reduction in limitation Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0- If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction. Enter the <b>smaller</b> of line 5 or line 8.	9	
10	Carryover of disallowed deduction from line 13 of your 2001 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instrs).	11	
12	Section 179 expense deduction Add lines 9 and 10, but do not enter more than line 11.	12	
13	Carryover of disallowed deduction to 2003. Add lines 9 and 10, less line 12	13	

**Note:** Do not use Part II or Part III below for listed property. Instead, use Part V.**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election (see instructions)	15	
16	Other depreciation (including ACRS) (see instructions)	16	

**Part III MACRS Depreciation (Do not include listed property.) (See instructions)****Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2002	17	25,017.
18	If you are electing under section 168(i)(4) to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

**Section B – Assets Placed in Service During 2002 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only — see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27.5 yrs	MM	S/L	
			27.5 yrs	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	
				MM	S/L	

**Section C – Assets Placed in Service During 2002 Tax Year Using the Alternative Depreciation System**

20a Class life				S/L	
b 12-year		12 yrs		S/L	
c 40-year		40 yrs	MM	S/L	

**Part IV Summary (see instructions)**

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instructions	22	25,017.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

**Part V**

**Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)

**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete **only** 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

**Section A – Depreciation and Other Information (Caution: See instructions for limits for passenger automobiles.)**

24a Do you have evidence to support the business/investment use claimed?					Yes	No	24b If 'Yes,' is the evidence written?			Yes	No
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/Convention	(h) Depreciation deduction	(i) Elected section 179 cost			
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)								25			
26 Property used more than 50% in a qualified business use (see instructions):											
27 Property used 50% or less in a qualified business use (see instructions):											
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1								28			
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1								29			

**Section B – Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other 'more than 5% owner,' or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1	(b) Vehicle 2	(c) Vehicle 3	(d) Vehicle 4	(e) Vehicle 5	(f) Vehicle 6
30 Total business/investment miles driven during the year (do not include commuting miles – see instructions)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year. Add lines 30 through 32						
	Yes	No	Yes	No	Yes	No
34 Was the vehicle available for personal use during off-duty hours?						
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

**Section C – Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see instructions).

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (see instructions)		

**Note:** If your answer to 37, 38, 39, 40, or 41 is 'Yes,' do not complete Section B for the covered vehicles

**Part VI****Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2002 tax year (see instructions):					
43 Amortization of costs that began before your 2002 tax year					43
44 Total. Add amounts in column (f). See instructions for where to report.					44

Form 990-PF, Page 1, Part I, Line 23

**Line 23 Stmt**

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
SALARIES & RELATED COSTS	2,158,870.			
CONTRACTED SERVICES	1,158,081.			
EQUIPMENT & MAINTENANCE	41,174.			
OFFICE SUPPLIES & SERVICES	136,383.			
MISCELLANEOUS	40,891.			
CONTRIBUTIONS TO RELATED PARTIES	39,860.			
COMMUNICATIONS	34,605.			
INSURANCE	11,036.			
BAD DEBT	34,657.			
LOSS ON DISPOSAL OF ASSETS	3,183.			

Total 3,658,740.

Form 990-PF, Page 1, Part I, Line 16c

**L-16c Stmt**

Line 16c - Other Professional Fees: Name of Provider	Type of Service Provided	Amount Paid
VARIOUS	CONSULTING SERVICES	115,513.

Total 115,513.

**Supporting Statement of:**

Form 990-PF, p6/Part IX-A, Expenses-1

Description	Amount
GOVERNORS AND CORPORATE LEADERS WANT TO KNOW HOW THE EXPECTATIONS THEIR EDUCATION SYSTEMS ARE DEVELOPING FOR THEIR STUDENTS MATCH UP AGAINST WHAT OTHER STATES AND NATIONS EXPECT, ESPECIALLY THOSE STATES AND NATIONSS WHOSE EDUCATIONAL PERFORMANCE EXCEEDS THEIR OWN. IN ORDER TO RESPOND TO THIS NEED, ACHIEVE DEVELOPED COMPREHENSIVE BENCHMARKING AND ALIGNMENT PROCESSES AND REPORTING FOR HELPING STATES BENCHMARK THEIR STANDARDS AND ASSESSMENTS AGAINST THE BEST AVAILABLE NATIONAL AND INTERNATIONAL EXEMPLARS. BENCHMARKING, POLICY REVIEW AND ALIGNMENT PROJECTS HAVE BEEN SUCCESSFULLY DONE IN VARIOUS STATES.	757,584.
Total	757,584.

**Supporting Statement of:**

Form 990-PF, p6/Part IX-A, Expenses-2

Description	Amount
IN FY98, ACHIEVE WORKED TO CREATE AN ASSESSMENT CONSORTIUM. THE CONSORTIUM CONTINUED WORK IN FY99 RESULTING IN ACHIEVE AND TEN STATES FORMING A PARTNERSHIP TO TIE MIDDLE SCHOOL MATCH TEACHING AND TESTING TO COMMON, INTERNATIONALLY CHALLENGING STANDARDS. THE ORIGINAL STATES INVOLVED WERE ILLINIOS, INDIANA, MARYLAND, MASSACHUSETTS, MICHIGAN, NEW HAMSHIRE, NORTH CAROLINA, VERMONT WASHINGTON, WISCONSIN. BY COMMON AGREEMENT, THE ASSESSMENT CONSORTIUM WAS RENAMED TO THE MATHEMATICS ACHIEVEMENT PARTNERSHIP ("MAP") WITH A CHARTER TO RESPOND TO THE WEAKNESS IN MIDDLE SCHOOL MATH PERFORMANCE EXPOSED BY THE RECENT THIRD INTERNATIONAL MATHEMATICS AND SCIENCE STUDY (TIMSS). IN FY00, THE PARTNERSHIP IDENTIFIED INSTRUCTIONAL MATERIALS AND PROFESSIONAL DEVELOPMENT TO HELP STUDENTS AND TEACHERS PREPARE FOR A RIGORIOUS EIGHT GRADE ASSESSMENT. MAP FOCUSED ON THE FUNDAMENTAL AREAS THAT FORM THE CORE EXPECTATIONS IN MIDDLE IN HIGH ACHIEVING COUNTRIES. THEY AMOUNT TO THE UNDERPINNINGS OF ALGEBRA AND GEEOMETRY: EQUATIONS, FORMULAS, TWO-DIMENSIONAL GEOMETRY, MEASUREMENT, PROPORTIONALITY, EXPONENTS, ROOTS, RADICALS, SLOPE, AND CONGRUENCE AND SIMILARITY. THE MAP INITIATIVE DEVELOPED THE FOLLOWING: (1) A MODEL SYLLABUS OUTLINING CONTENT FROM SIXTH GRADE TO EIGHTH GRADE TO HELP STUDENTS	

Continued

**Supporting Statement of:**

Form 990-PF, p6/Part IX-A, Expenses-2

Description	Amount
AND TEACHERS PREPARE FOR THE NEW EXAM, (2) ADVICE, BASED IN PART ON RESEARCH IN OTHER COUNTRIES, ABOUT TEXTBOOKS AND OTHER MATERIALS THAT ALIGN WITH COURSE CONTENT, (3) GUIDANCE ON DESIGNING HIGH-QUALITY TRAINING FOR TEACHERS, AND (4) THE DESIGN OF AN INTERNATIONALLY BENCHMARKED ASSESSMENT TO BE GIVEN NEAR THE END OF EIGHTH GRADE THAT WILL INFORM PARENTS, EDUCATORS, EMPLOYERS, AND POLICY-MAKERS OF HOW WELL STUDENTS ARE MASTERING THE FOUNDATIONS OF ALGEBRA AND GEOMETRY.	1,160,590.
Total	<u>1,160,590.</u>

**Supporting Statement of:**

Form 990-PF, p6/Part IX-A, Expenses-3

Description	Amount
FROM THE OUTSET ACHIEVE HAS BELIEVED THAT ONE OF ITS PRINCIPAL MISSIONS IS TO HELP BUILD PUBLIC UNDERSTANDING AND SUPPORT FOR STANDARDS-BASED REFORM. DURING THE PAST YEAR ACHIEVE BOARD MEMBERS SENIOR ASSOCIATES AND STAFF HAVE PARTICIPATED IN DOZENS OFF PUBLIC SPEAKING ENGAGEMENTS ACROSS THE NATION GIVING US THE OPPORTUNITY TO SPREAD THE WORD ABOUT THE IMPORTANCE OF HIGH QUALITY STANDARDS AND ASSESSMENTS AND THE TECHNICAL ASSISTANCE AND SERVICES THAT ACHIEVE CAN PROVIDE TO STATES TO HELP THEM MEET THE COMMITMENTS MADE AT THE SUMMIT.	555,581.
Total	<u>555,581.</u>