

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

**2009**

Department of the Treasury  
Internal Revenue Service

▶ The organization may have to use a copy of this return to satisfy state reporting requirements

Open to Public Inspection

**A For the 2009 calendar year, or tax year beginning and ending**

<b>B</b> Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	Please use IRS label or print or type  See Specific Instructions	<b>C Name of organization</b> <b>INSTITUTE FOR HIGHER EDUCATION POLICY</b> Doing Business As		<b>D Employer identification number</b> 52-1818907
		Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>1320 19TH STREET, NW 400</b>	<b>E Telephone number</b> 202-861-8223	
<b>F Name and address of principal officer</b> <b>MICHELLE COOPER</b> <b>SAME AS C ABOVE</b>		<b>G Gross receipts \$</b> 5,120,866.		
<b>I Tax-exempt status</b> <input checked="" type="checkbox"/> 501(c) ( 3 ) ◀ (insert no) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(a) Is this a group return for affiliates?</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b) Are all affiliates included?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions)		
<b>J Website:</b> ▶ WWW.IHEP.ORG		<b>H(c) Group exemption number</b> ▶		
<b>K Form of organization:</b> <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶			<b>L Year of formation:</b> 1993 <b>M State of legal domicile:</b> DC	

**Part I Summary**

1 Briefly describe the organization's mission or most significant activities <b>SEE PART III, LINE 1</b>					
2 Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets					
3 Number of voting members of the governing body (Part VI, line 1a)	3	9			
4 Number of independent voting members of the governing body (Part VI, line 1b)	4	9			
5 Total number of employees (Part V, line 2a)	5	19			
6 Total number of volunteers (estimate if necessary)	6	9			
7a Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	0.			
7b Net unrelated business taxable income from Form 990-T, line 34	7b	0.			
<b>Revenue</b> 8 Contributions and grants (Part VIII, line 1h) 9 Program service revenue (Part VIII, line 2g) 10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 12 Total revenue. Add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>Prior Year</b> 7,360,889. 53,798. 13,820. 23,187. 7,451,694.		<b>Current Year</b> 4,862,241. 193,675. 46,792. 18,158. 5,120,866.		
	<b>Expenses</b> 13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 14 Benefits paid to or for members (Part IX, column (A), line 4) 15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) 16a Professional fundraising fees (Part IX, column (A), line 11e) b Total fundraising expenses (Part IX, column (D), line 25) ▶ 17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f) 18 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) 19 Revenue less expenses. Subtract line 18 from line 12	957,495. 973,713. 1,831,016. 2,804,729. 4,646,965.		727,557. 1,375,164. 3,060,216. 2,060,650.	
		<b>Beginning of Current Year</b> 5,786,603.		<b>End of Year</b> 7,892,181.	
		20 Total assets (Part X, line 16) 21 Total liabilities (Part X, line 26)		238,275. 283,203.	
		22 Net assets or fund balances. Subtract line 21 from line 20		5,548,328. 7,608,978.	

**Part II Signature Block**

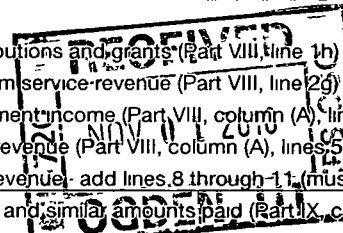
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

**Sign Here** ▶ *Michelle Cooper* Signature of officer Date **10/27/10**  
 ▶ **MICHELLE COOPER, PRESIDENT** Type or print name and title

**Paid Preparer's Use Only**  
 Preparer's signature ▶ *David F. Harding CPA* Date **10-20-10** Check if self-employed   
 Firm's name (or yours if self-employed), address, and ZIP + 4 ▶ **GELMAN, ROSENBERG & FREEDMAN**  
**4550 MONTGOMERY AVE., SUITE 650 NORTH**  
**BETHESDA, MARYLAND 20814-2930**  
 EIN ▶ Phone no. ▶ **(301) 951-9090**

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

SCANNED NOV 16 2010 Activities & Governance



Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission: SEE SCHEDULE O FOR CONTINUATION THE MISSION OF THE INSTITUTE FOR HIGHER EDUCATION POLICY IS TO INCREASE ACCESS AND SUCCESS IN POSTSECONDARY EDUCATION AROUND THE WORLD THROUGH UNIQUE RESEARCH AND INNOVATIVE PROGRAMS THAT INFORM KEY DECISION MAKERS WHO SHAPE PUBLIC POLICY AND SUPPORT ECONOMIC AND

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [ ] Yes [X] No If "Yes," describe these changes on Schedule O

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code ) (Expenses \$ 2,021,937. including grants of \$ 898,245. ) (Revenue \$ 193,675. )

GRANTS:

IHEP PROGRAM GRANTS SEEK TO BUILD CAPACITY A HIGHER EDUCATION INSTITUTIONS, COMMUNITY COLLEGES, COLLEGES, AND UNIVERSITIES TO INCREASE STUDENT RETENTION AND GRADUATION. THESE INITIATIVES PROVIDE TECHNICAL SUPPORT TO INSTITUTIONS THROUGH CONFERENCES, CONSULTANTS, AND/OR INSTITUTIONAL SITE VISITS TO IMPROVE THEIR STUDENT LEARNING PRACTICES INSIDE AND OUTSIDE OF THE CLASSROOM. THROUGH THESE PROGRAMS, IHEP OFTEN ALSO PROVIDES ONGOING OVERSIGHT OF AND FEEDBACK FOR THE NEW INSTITUTIONAL POLICIES AND PRACTICES BEING PUT IN PLACE BY THE PARTICIPATING INSTITUTIONS. FINALLY, THROUGH THESE GRANTS, IHEP TRACKS AND DISSEMINATES BEST PRACTICES THAT CAN BE SHARED WITH THE LARGER HIGHER EDUCATION COMMUNITY.

4b (Code ) (Expenses \$ 566,560. including grants of \$ 59,250. ) (Revenue \$ )

RESEARCH:

THE RESEARCH TEAM HAS TWO MAIN AREAS OF WORK: POLICY RESEARCH AND PROGRAM EVALUATION. THE RESEARCH PROJECTS FOCUS ON EITHER A PARTICULAR POPULATION NATIONALLY OR TARGET SPECIFIC POLICIES OR REGIONS TO UNDERSTAND THE BARRIERS TO ACCESSING HIGHER EDUCATION FOR UNDERSERVED STUDENTS. BASED ON THE FINDINGS, POLICY RECOMMENDATIONS ARE THEN PRESENTED AND DISSEMINATED TO POLICYMAKERS (LOCAL, STATE AND NATIONAL), EDUCATORS, AND OTHER ORGANIZATIONS WORKING WITH UNDERREPRESENTED STUDENTS. THE PROGRAM EVALUATION COMPONENT CONDUCTS RESEARCH ON VARIOUS PROGRAMS WORKING TO DEMOLISH ACCESS BARRIERS AND THEN REPORTS THOSE RESULTS TO THE PROGRAM IMPLEMENTERS WITH SUGGESTIONS FOR IMPROVING THEIR PROGRAM OUTCOMES.

4c (Code ) (Expenses \$ 457,977. including grants of \$ ) (Revenue \$ )

INTERNATIONAL:

IHEP'S INTERNATIONAL WORK DRAWS LESSONS FROM OTHER COUNTRIES REGARDING HIGHER EDUCATION POLICY ISSUES AND PRESENTS INFORMATION THAT U.S. AUDIENCES SHOULD KNOW. IN 2008, IHEP WAS FUNDED FOR A NUMBER OF INTERNATIONAL PROJECTS, INCLUDING THE GLOBAL POLICY FELLOWS PROGRAM, WHICH WORKED TO BUILD A NETWORK OF MID-CAREER PROFESSIONALS IN SIX COUNTRIES; OUR RANKINGS RESEARCH AGENDA, THROUGH WHICH WE CREATED AN ONLINE CLEARINGHOUSE OF INFORMATION ON COLLEGE RANKINGS ACROSS THE GLOBE; CONTINUED WORK IN ADDING TO THE ONLINE CLEARINGHOUSE OF INFORMATION FOR OUR GLOBAL CENTER ON THE PRIVATE FINANCING OF HIGHER EDUCATION; AND PRELIMINARY RESEARCH ON THE BOLOGNA PROCESS IN EUROPE UNDERTAKEN FOR OUR GLOBAL PERFORMANCE PROJECT.

4d Other program services (Describe in Schedule O) (Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses \$ 3,046,474.

**Part IV Checklist of Required Schedules**

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4	<b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		X
5	<b>Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations.</b> Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>	N/A	
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11	Is the organization's answer to any of the following questions "Yes"? <i>If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
	• Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i>		
	• Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>		
	• Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>		
	• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>		
	• Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>		
	• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? <i>If "Yes," complete Schedule D, Part X</i>		
12	Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII.</i>	X	
12A	Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional</i>		
		Yes	No
12A			X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? <i>If "Yes," complete Schedule F, Part I</i>		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20	Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X

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

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties, (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
36 <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19?	X	

**Note.** All Form 990 filers are required to complete Schedule O.

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

		Yes	No
<b>1a</b>	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
<b>1b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
<b>c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
<b>2a</b>	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return (see instructions)	X	
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
<b>b</b>	If "Yes," enter the name of the foreign country See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
<b>c</b>	If "Yes," to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	X	
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year		
<b>e</b>	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
<b>g</b>	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
<b>h</b>	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year? <b>N/A</b>		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the organization make any taxable distributions under section 4966? <b>N/A</b>		
<b>b</b>	Did the organization make a distribution to a donor, donor advisor, or related person? <b>N/A</b>		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12 <b>N/A</b>		
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders <b>N/A</b>		
<b>b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)		
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		

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

**Section A. Governing Body and Management**

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

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

		Yes	No
10a	Does the organization have local chapters, branches, or affiliates?		X
10b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	X	
11A	Describe in Schedule O the process, if any, used by the organization to review this Form 990.		
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13.	X	
12b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done.	X	
13	Does the organization have a written whistleblower policy?	X	
14	Does the organization have a written document retention and destruction policy?	X	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
15a	The organization's CEO, Executive Director, or top management official	X	
15b	Other officers or key employees of the organization. If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)		X
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

**Section C. Disclosure**

17 List the states with which a copy of this Form 990 is required to be filed: **NONE**

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.  
 Own website     Another's website     Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **LISA STEWART - (202)861-8240**  
**1320 19TH STREET, NW, NO. 400, WASHINGTON, DC 20036**

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

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

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year Use Schedule J-2 if additional space is needed

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons

Check this box if the organization did not compensate any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
KATHY ISAACSON CHAIRPERSON	2.00	X		X			0.	0.	0.	
LAURA PERNA SECRETARY	2.00	X		X			0.	0.	0.	
CHERYL BLANCO BOARD MEMBER	2.00	X					0.	0.	0.	
ARTHUR COLEMAN BOARD MEMBER	2.00	X					0.	0.	0.	
GWENDOLYN DUNGY BOARD MEMBER	2.00	X					0.	0.	0.	
AUGIE GALLEGO BOARD MEMBER	2.00	X					0.	0.	0.	
CATHERINE MILTON BOARD MEMBER	2.00	X					0.	0.	0.	
RICHARD STAUFENBERGER BOARD MEMBER	2.00	X					0.	0.	0.	
GREGORY WINFIELD BOARD MEMBER	2.00	X					0.	0.	0.	
MICHELLE COOPER PRESIDENT	40.00			X			143,185.	0.	4,296.	
LISA STEWART DIRECTOR OF FINANCE	40.00			X			63,755.	0.	1,913.	

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

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
<b>1b Total</b>							<b>206,940.</b>	<b>0.</b>	<b>6,209.</b>	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **1**

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

**Section B. Independent Contractors**

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization **NONE**

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

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



**Part VIII Statement of Revenue**

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1 a Federated campaigns	1a				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	4862241.			
	g Noncash contributions included in lines 1a-1f \$					
	<b>h Total.</b> Add lines 1a-1f		4862241.			
Program Service Revenue	2 a <u>SUMMER ACADEMY</u>	Business Code 900099	193,675.	193,675.		
	b					
	c					
	d					
	e					
	f All other program service revenue					
	<b>g Total.</b> Add lines 2a-2f		193,675.			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		46,792.		46,792.	
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6 a Gross Rents	(i) Real				
		(ii) Personal				
		b Less: rental expenses				
		c Rental income or (loss)				
	d Net rental income or (loss)					
	7 a Gross amount from sales of assets other than inventory	(i) Securities				
		(ii) Other				
		b Less: cost or other basis and sales expenses				
		c Gain or (loss)				
	d Net gain or (loss)					
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c) See Part IV, line 18	a				
		b Less direct expenses	b			
c Net income or (loss) from fundraising events						
9 a Gross income from gaming activities. See Part IV, line 19	a					
	b Less direct expenses	b				
	c Net income or (loss) from gaming activities					
10 a Gross sales of inventory, less returns and allowances	a					
	b Less cost of goods sold	b				
	c Net income or (loss) from sales of inventory					
Miscellaneous Revenue		Business Code				
11 a <u>MISCELLANEOUS</u>	900099	18,158.		18,158.		
b						
c						
d All other revenue						
<b>e Total.</b> Add lines 11a-11d		18,158.				
<b>12 Total revenue.</b> See instructions.		5120866.	193,675.	0.	64,950.	

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	957,495.	957,495.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	197,498.	167,281.	30,217.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	371,518.	360,767.	10,751.	
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits	113,320.		113,320.	
10 Payroll taxes	45,221.		45,221.	
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting	40,707.		40,707.	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other	327,607.	298,396.	29,211.	
12 Advertising and promotion				
13 Office expenses	193,037.	161,935.	31,102.	
14 Information technology	49,488.		49,488.	
15 Royalties				
16 Occupancy	138,626.		138,626.	
17 Travel	303,034.	297,282.	5,752.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	227,377.	222,989.	4,388.	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	13,540.		13,540.	
23 Insurance	6,123.		6,123.	
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a <b>SUBSCRIPTIONS &amp; DUES</b>	36,603.	36,460.	143.	
b <b>MISCELLANEOUS EXPENSES</b>	28,586.	3,909.	24,677.	
c <b>MAINTENANCE</b>	19,609.	12,279.	7,330.	
d <b>PENSION ADMIN FEES</b>	4,037.		4,037.	
e <b>G&amp;A ALLOCATION</b>	-13,210.	527,681.	-540,891.	
f All other expenses				
25 <b>Total functional expenses.</b> Add lines 1 through 24f	3,060,216.	3,046,474.	13,742.	0.
26 <b>Joint costs.</b> Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

**Part X Balance Sheet**

		(A) Beginning of year		(B) End of year	
<b>Assets</b>	1	Cash - non-interest-bearing	9,418.	1	4,302.
	2	Savings and temporary cash investments	1,491,593.	2	2,818,290.
	3	Pledges and grants receivable, net	306,837.	3	2,065,786.
	4	Accounts receivable, net		4	
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges	42,621.	9	71,255.
	10a	Land, buildings, and equipment. cost or other basis Complete Part VI of Schedule D	10a 176,372.		
	b	Less accumulated depreciation	10b 160,799.	10c 29,235.	15,573.
	11	Investments - publicly traded securities	3,896,000.	11	2,906,076.
	12	Investments - other securities See Part IV, line 11		12	
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets See Part IV, line 11	10,899.	15	10,899.
16	<b>Total assets.</b> Add lines 1 through 15 (must equal line 34)	5,786,603.	16	7,892,181.	
<b>Liabilities</b>	17	Accounts payable and accrued expenses	131,829.	17	165,388.
	18	Grants payable		18	
	19	Deferred revenue	39,049.	19	60,990.
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D		21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities. Complete Part X of Schedule D	67,397.	25	56,825.
	26	<b>Total liabilities.</b> Add lines 17 through 25	238,275.	26	283,203.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.</b>				
	27	Unrestricted net assets	-393,875.	27	145,725.
	28	Temporarily restricted net assets	5,942,203.	28	7,463,253.
	29	Permanently restricted net assets		29	
	<b>Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.</b>				
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
33	<b>Total net assets or fund balances</b>	5,548,328.	33	7,608,978.	
34	<b>Total liabilities and net assets/fund balances</b>	5,786,603.	34	7,892,181.	

**Part XI Financial Statements and Reporting**

- 1 Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
 If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O
- 2a Were the organization's financial statements compiled or reviewed by an independent accountant?
- b Were the organization's financial statements audited by an independent accountant?
- c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?  
 If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O
- d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:  
 Separate basis  Consolidated basis  Both consolidated and separate basis
- 3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

	Yes	No
2a		X
2b	X	
2c	X	
3a		X
3b		

Form 990 (2009)

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

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

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

OMB No 1545-0047

**2009**

Open to Public Inspection

Name of the organization **INSTITUTE FOR HIGHER EDUCATION POLICY** Employer identification number **52-1818907**

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

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

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

	Yes	No
(i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?		
(ii) A family member of a person described in (i) above?		
(iii) A 35% controlled entity of a person described in (i) or (ii) above?		
- h Provide the following information about the supported organization(s)

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

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	3,825,425.	1,910,177.	3,068,983.	7,360,889.	4,862,241.	21,027,715.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	3,825,425.	1,910,177.	3,068,983.	7,360,889.	4,862,241.	21,027,715.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						14,309,208.
6 Public support. Subtract line 5 from line 4						6,718,507.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4	3,825,425.	1,910,177.	3,068,983.	7,360,889.	4,862,241.	21,027,715.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	24,693.	31,962.	26,189.	13,820.	46,792.	143,456.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV)	9,660.	46,614.	3,010.	6,480.	18,158.	83,922.
11 Total support. Add lines 7 through 10						21,255,093.
12 Gross receipts from related activities, etc. (see instructions)					12	598,486.

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

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

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	31.61 %
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	38.20 %
16a <b>33 1/3% support test - 2009.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b <b>33 1/3% support test - 2008.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization <input checked="" type="checkbox"/>		
17a <b>10% -facts-and-circumstances test - 2009.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b <b>10% -facts-and-circumstances test - 2008.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 <b>Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

**Part III Support Schedule for Organizations Described in Section 509(a)(2)** (Complete only if you checked the box on line 9 of Part I.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge						
<b>6 Total.</b> Add lines 1 through 5						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
<b>c</b> Add lines 7a and 7b						
<b>8 Public support</b> (Subtract line 7c from line 6)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
<b>9</b> Amounts from line 6						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
<b>c</b> Add lines 10a and 10b						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
<b>12</b> Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
<b>13 Total support</b> (Add lines 9, 10c, 11, and 12)						

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

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

<b>15</b> Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	%
<b>16</b> Public support percentage from 2008 Schedule A, Part III, line 15	16	%

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

<b>17</b> Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
<b>18</b> Investment income percentage from 2008 Schedule A, Part III, line 17	18	%

**19a 33 1/3% support tests - 2009.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2008.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Schedule D

(Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

Attach to Form 990. See separate instructions.

OMB No 1545-0047

2009

Open to Public Inspection

Name of the organization

INSTITUTE FOR HIGHER EDUCATION POLICY

Employer identification number

52-1818907

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

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

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

Form with multiple sections: 1 Purpose(s) of conservation easements held by the organization (check all that apply), 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution... (includes sub-table 2a-2d), 3 Number of conservation easements modified... during the tax year, 4 Number of states where property subject to conservation easement is located, 5 Does the organization have a written policy regarding the periodic monitoring...?, 6 Staff and volunteer hours devoted to monitoring... during the year, 7 Amount of expenses incurred in monitoring... during the year, 8 Does each conservation easement reported on line 2(d) above satisfy the requirements...?, 9 In Part XIV, describe how the organization reports conservation easements...

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

Form with sections: 1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items; b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items (i) Revenues included in Form 990, Part VIII, line 1; (ii) Assets included in Form 990, Part X; 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items: a Revenues included in Form 990, Part VIII, line 1; b Assets included in Form 990, Part X



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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange programs
  - e  Other \_\_\_\_\_

- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

**Part IV Escrow and Custodial Arrangements.** Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  Yes  No
- b If "Yes," explain the arrangement in Part XIV and complete the following table

- c Beginning balance
- d Additions during the year
- e Distributions during the year
- f Ending balance

	Amount
1c	
1d	
1e	
1f	

- 2a Did the organization include an amount on Form 990, Part X, line 21?  Yes  No
- b If "Yes," explain the arrangement in Part XIV

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Net investment earnings, gains, and losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

- 2 Provide the estimated percentage of the year end balance held as
- a Board designated or quasi-endowment ▶ \_\_\_\_\_ %
  - b Permanent endowment ▶ \_\_\_\_\_ %
  - c Term endowment ▶ \_\_\_\_\_ %

- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- (i) unrelated organizations
  - (ii) related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

- b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

- 4 Describe in Part XIV the intended uses of the organization's endowment funds

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

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		33,723.	26,814.	6,909.
d Equipment		142,649.	133,985.	8,664.
e Other				
<b>Total.</b> Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				15,573.



**Part XI Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements**

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	5,120,866.
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	3,060,216.
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	2,060,650.
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net) Add lines 4 through 8	9	0.
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	10	2,060,650.

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

1	Total revenue, gains, and other support per audited financial statements	1	5,120,866.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	5,120,866.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12)	5	5,120,866.

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

1	Total expenses and losses per audited financial statements	1	3,060,216.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	3,060,216.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18)	5	3,060,216.

**Part XIV Supplemental Information**

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

**PART X: IN JUNE 2006, THE FINANCIAL ACCOUNTING STANDARDS BOARD**

**(FASB) RELEASED FASB ASC 740-10, INCOME TAXES, THAT PROVIDES GUIDANCE FOR**

**REPORTING UNCERTAINTY IN INCOME TAXES. FOR THE YEAR ENDED DECEMBER 31,**

**2009, THE INSTITUTE HAS DOCUMENTED ITS CONSIDERATION OF FASB ASC 740-10**

**AND DETERMINED THAT NO MATERIAL UNCERTAIN TAX POSITIONS QUALIFY FOR EITHER**

**RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS.**

**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990.

OMB No 1545-0047

**2009**

Open to Public  
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Name of the organization **INSTITUTE FOR HIGHER EDUCATION POLICY** Employer identification number **52-1818907**

**Part I General Information on Grants and Assistance**

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  Yes  No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

**Part II Grants and Other Assistance to Governments and Organizations in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SALISH KOOTENAI COLLEGE PO BOX 70 PABLO, MT 59855	81-0378823	501(C)(3)	58,025.	0.			SALISH KOOTENAI COLLEGE IS DEVELOPING A COORDINATED, EVIDENCE-BASED ACADEMIC
CLAFLIN UNIVERSITY 400 MAGNOLIA STREET ORANGEBUG, SC 29115	57-0314374	501(C)(3)	58,025.	0.			CLAFLIN UNIVERSITY IS IMPLEMENTING THE LEARNING IN COMMUNITIES FOR SUCCESS (LINCS) PROJECT.
NORFOLK STATE UNIVERISTY 700 PARK AVE. W.L. NORFOLK, VA 23504	54-6002808		58,025.	0.			NSU'S PROJECT, "LEARNING TO LEARN" (L2L), IS DESIGNED TO INCREASE FIRST-GENERATION STUDENTS
MOUNT ST. MARY'S COLLEGE 12001 CHALON ROAD LOS ANGELES, CA 90049	95-1641455	501(C)(3)	58,025.	0.			MSMC IS EXTENDING THE WORK, PHILOSOPHY AND DIVERSITY OF THE SUMMER BRIDGE PROGRAM (SUMMER
TENNESSEE STATE UNIVERSITY BOX 3500 JOHN MERRITT BLVD. BOX 954 NASHVILLE, TN 37209	62-0786119		58,025.	0.			TENNESSEE STATE UNIVERSITY IS IMPLEMENTING A COHORT-BASED LEARNING
UNIVERSITY OF THE DISTRICT OF COLUMBIA - 4200 CONNECTICUT AVENUE, NW BUILDING 39-301M - WASHINGTON, DC 20008	53-6001131		58,025.	0.			UNIVERSITY OF THE DISTRICT OF COLUMBIA'S PROJECT, PROJECT SOAR4, IS BEING DEVELOPED WITH

2 Enter total number of section 501(c)(3) and government organizations **15.**

3 Enter total number of other organizations **0.**

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule I (Form 990) 2009

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

**Part III**

**Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22. Use Part IV and Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance

**Part IV**

**Supplemental Information.** Complete this part to provide the information required in Part I, line 2, and any other additional information

SCHEDULE I, PART I, LINE 2: IHEP MONITORS GRANT FUNDS BY REQUIRING INTERIM PROGRESS AND FINANCIAL REPORTS ON A YEARLY BASIS.

PART II, LINE 1, COLUMN (H):  
 NAME OF ORGANIZATION OR GOVERNMENT: SALISH KOOTENAI COLLEGE  
 (H) PURPOSE OF GRANT OR ASSISTANCE: SALISH KOOTENAI COLLEGE IS DEVELOPING A COORDINATED, EVIDENCE-BASED ACADEMIC DEPARTMENT FOR RETENTION AND ACADEMIC SUCCESS OF AMERICAN INDIAN FIRST-GENERATION STUDENTS WHO REQUIRE DEVELOPMENTAL COURSEWORK. PROGRAM ACTIVITIES WILL

**SCHEDULE I-1  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Continuation Sheet for Schedule I (Form 990)**  
▶ Attach to Form 990 to list additional information for  
Schedule I (Form 990), Part II or Part III.

OMB No 1545-0047

**2009**  
**Open to Public  
Inspection**

Name of the organization

**INSTITUTE FOR HIGHER EDUCATION POLICY**

Employer identification number  
**52-1818907**

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COLORADO STATE UNIVERSITY 2200 BONFORTE BLVD PUEBLO, CO 81001	84-0517947		58,025.	0.			COLORADO STATE UNIVERSITY-PUEBLO IS DEVELOPING FACULTY AND STUDENT MENTORING OF
UNIVERSITY OF THE INCARNATE WORLD 4301 BROADWAY SAN ANTONIO, TX 78209	74-1109661	501(C)(3)	58,025.	0.			UNIVERSITY OF THE INCARNATE WORD'S PROJECT FOCUS IS A FACULTY DEVELOPMENT PROGRAM
SPELMAN COLLEGE 350 SPELMAN LN. SW ATLANTA, GA 30314	58-0566243	501(C)(3)	58,025.	0.			SPELMAN COLLEGE IS DEVELOPING ON A TWO-SEMESTER, FIRST-YEAR SEMINAR TO INCREASE
FLORIDA INTERNATIONAL UNIVERSITY 11200 SW 8TH ST. PC 238 MIAMI, FL 33199	65-0177616	501(C)(3)	58,025.	0.			FLORIDA INTERNATIONAL UNIVERSITY WILL FOLLOW COHORTS OF 150 FIRST-GENERATION
RESEARCH FOUNDATION OF THE CITY UNIVERSITY - 230 WEST 41ST ST. 7TH FLOOR - NEW YORK, NY 10036	13-1988190	501(C)(3)	58,025.	0.			LAGUARDIA COMMUNITY COLLEGE IS INTEGRATING A COHORT OF DEGREE-SEEKING, FIRST-GENERATION STUDENTS
NORTHWEST INDIAN COLLEGE 2522 KWINA ROAD BELLINGHAM, WA 98226	91-0905644	501(C)(3)	58,025.	0.			NIC IS BUILDING UPON AND STRENGTHENING ITS FIRST-YEAR EXPERIENCE PROGRAM TO BETTER SERVE
CALIFORNIA STATE UNIVERSITY 4910 N. CHESTER AVE FRESNO, CA 93726	94-6003272	501(C)(3)	58,025.	0.			THE CALIFORNIA STATE UNIVERSITY-FRESNO PROJECT TARGETS FIRST-GENERATION STUDENTS IN NEED OF
BENNETT COLLEGE 900 E. WASHINGTON STREET GREENSBORO, NC 27401	56-0532296	501(C)(3)	58,025.	0.			BENNETT COLLEGE FOR WOMEN IS DEVELOPING FIRST-GENERATION STUDENT LEARNING COMMUNITIES.

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I-1 (Form 990) 2009

**SCHEDULE I-1  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Continuation Sheet for Schedule I (Form 990)**  
**▶ Attach to Form 990 to list additional information for  
 Schedule I (Form 990), Part II or Part III.**

OMB No. 1545-0047

**2009**  
**Open to Public  
 Inspection**

Name of the organization

**INSTITUTE FOR HIGHER EDUCATION POLICY**

Employer identification number

**52-1818907**

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NAVAJO TECHNICAL COLLEGE PO BOX 849 CROWNPOINT, NM 87313	85-0303705	501(C)(3)	58,295.	0.			NAVAJO TECHNICAL COLLEGE WILL 1) IMPLEMENT COLLABORATIVE, INTERDISCIPLINARY,

**Part IV** Supplemental Information

CREATE AN ACADEMIC DEPARTMENT FOR DEVELOPMENTAL STUDIES TO INCREASE THE RETENTION AND ACADEMIC SUCCESS OF MINORITY FIRST-GENERATION COLLEGE STUDENTS WHO REQUIRE BASIC SKILLS EDUCATION TO ACHIEVE SUCCESS IN COLLEGE-LEVEL COURSEWORK AND TO PROVIDE CENTRALIZED DEVELOPMENT PROGRAMS FOR REMEDIAL INSTRUCTORS WORKING WITH THESE STUDENTS.

NAME OF ORGANIZATION OR GOVERNMENT: CLAFLIN UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: CLAFLIN UNIVERSITY IS IMPLEMENTING THE LEARNING IN COMMUNITIES FOR SUCCESS (LINCS) PROJECT, ENROLLING FIRST-GENERATION STUDENTS IN SECTIONS OF THREE LINKED COURSES: ENGLISH, MATH, AND FRESHMAN ORIENTATION. THE LINKED COURSES WILL PRODUCE COLLABORATIVE LEARNING AND ENCOURAGE SHARED RESPONSIBILITY FOR LEARNING AMONG STUDENTS AND FACULTY. THE OBJECTIVES ARE TO INCREASE RETENTION AND PROVIDE A VENUE FOR NURTURING PERSONAL AND INTELLECTUAL GROWTH OF STUDENTS THROUGH SOCIAL, CIVIC AND ACADEMIC REALMS.

NAME OF ORGANIZATION OR GOVERNMENT: NORFOLK STATE UNIVERISTY

(H) PURPOSE OF GRANT OR ASSISTANCE: NSU'S PROJECT, "LEARNING TO LEARN" (L2L), IS DESIGNED TO INCREASE FIRST-GENERATION STUDENTS SOCIAL CAPITAL BY INTENTIONALLY AND PROACTIVELY ENGAGING THEM IN THE CAMPUS ACADEMIC COMMUNITY; DEVELOPING NECESSARY LEARNING SKILLS SETS; AND PROVIDING THE MOTIVATION, SUPPORT, AND RESOURCES THAT FIRST-GENERATION STUDENTS NEED TO SUCCESSFULLY NAVIGATE THE COLLEGE ENVIRONMENT. THE DISTINCTIVE FOCUS OF THE PROJECT IS DESIGNING A COLLABORATIVE, FACULTY-LED PROGRAM TO FACILITATE THE DEVELOPMENT OF STUDENTS' SELF-DIRECTED LEARNING SKILLS.

NAME OF ORGANIZATION OR GOVERNMENT: MOUNT ST. MARY'S COLLEGE



**Part IV** Supplemental Information

(H) PURPOSE OF GRANT OR ASSISTANCE: MSMC IS EXTENDING THE WORK, PHILOSOPHY AND DIVERSITY OF THE SUMMER BRIDGE PROGRAM (SUMMER SKILLS) TO THE ENTIRE COLLEGE. FOCUSING ON FIRST-YEAR LEARNERS, THE DESIRE TO INCREASE RETENTION AND GRADUATION THROUGH THE INTRODUCTION OF INTENTIONALLY MAINTAINED AND DEVELOPED CULTURALLY-RELEVANT PEDAGOGY. THE OBJECTIVE IS TO UTILIZE EXISTING SUMMER SKILLS PEDAGOGY OF CURRICULAR AND CO-CURRICULAR ACTIVITIES TO INCREASE FACULTY UNDERSTANDING OF FIRST-GENERATIONAL EXPERIENCES OF STUDENTS OF COLOR. THIS INITIATIVE WILL ALSO INCLUDE FACULTY MENTORING AND A FACULTY DEVELOPMENT WORKSHOP SERIES.

NAME OF ORGANIZATION OR GOVERNMENT: TENNESSEE STATE UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: TENNESSEE STATE UNIVERSITY IS IMPLEMENTING A COHORT-BASED LEARNING COMMUNITY THAT INCLUDES TWO CORE AND ONE ORIENTATION COURSE, PARTICIPATION IN A FACULTY-GUIDED SERVICE LEARNING PROJECT, AND INVOLVEMENT IN CO-CURRICULAR ACTIVITIES THAT REINFORCE LEARNING IN THE COURSES. PROJECT COMPONENTS INCLUDE SERVING MORE THAN 350 STUDENTS; LINKED LEARNING COMMUNITIES TO SUPPORT CORE COURSEWORK REQUIREMENTS AND PROVIDE OPPORTUNITIES FOR LEARNING ACROSS DISCIPLINARY LINES.

NAME OF ORGANIZATION OR GOVERNMENT:

UNIVERSITY OF THE DISTRICT OF COLUMBIA

(H) PURPOSE OF GRANT OR ASSISTANCE: UNIVERSITY OF THE DISTRICT OF COLUMBIA'S PROJECT, PROJECT SOAR4, IS BEING DEVELOPED WITH THE GOAL OF IMPROVING STUDENT LEARNING, COURSE PASS RATES, AND ACADEMIC SUCCESS FOR STUDENTS IN NEED OF DEVELOPMENTAL COURSES. PROJECT SOAR4 WILL CREATE A LEARNING COMMUNITY FOR 100 OF THESE STUDENTS WHO WILL FORM COHORTS ATTENDING DEVELOPMENTAL ENGLISH, DEVELOPMENTAL MATH, FRESHMEN

**Part IV** Supplemental Information

ORIENTATION, AND A CONTENT COURSE, SUCH AS SOCIOLOGY.

NAME OF ORGANIZATION OR GOVERNMENT: COLORADO STATE UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: COLORADO STATE UNIVERSITY-PUEBLO IS DEVELOPING FACULTY AND STUDENT MENTORING OF FIRST-GENERATION, MINORITY STUDENTS AS WELL AS SUPPLEMENTAL INSTRUCTION IN COURSES THAT STUDENTS HISTORICALLY STRUGGLE TO PASS. THE GOAL WILL BE TO INCREASE ACADEMIC PERFORMANCE AND RETENTION AMONG THIS POPULATION. THE INITIATIVE WILL ALSO INCLUDE THE DEVELOPMENT OF A CENTRALIZED FACULTY DEVELOP PROGRAM FOCUSED ON PEDAGOGICAL APPROACHES IMPORTANT TO FIRST-GENERATION STUDENT SUCCESS.

NAME OF ORGANIZATION OR GOVERNMENT: UNIVERSITY OF THE INCARNATE WORLD

(H) PURPOSE OF GRANT OR ASSISTANCE: UNIVERSITY OF THE INCARNATE WORD'S PROJECT FOCUS IS A FACULTY DEVELOPMENT PROGRAM FOCUSED ON FIRST-GENERATION SOPHOMORE STUDENT SUCCESS. THE INITIATIVE WILL EDUCATE FACULTY ON SOPHOMORE CHALLENGES AND WAYS OF REALIGNING TEACHING APPROACHES TO ADDRESS THESE CHALLENGES AND STRUCTURE OPPORTUNITIES FOR FACULTY TO SHARE AND BE RECOGNIZED FOR MODELS FOR SERVING FIRST-GENERATION SOPHOMORE STUDENTS. FOCUS WILL ALLOW THE EXTENSION OF THE EFFORTS THAT HAVE STARTED WITH FIRST-YEAR STUDENTS TO ASSIST THEM IN THEIR TRANSITION TO THEIR MAJOR FIELDS OF STUDY.

NAME OF ORGANIZATION OR GOVERNMENT: SPELMAN COLLEGE

(H) PURPOSE OF GRANT OR ASSISTANCE: SPELMAN COLLEGE IS DEVELOPING ON A TWO-SEMESTER, FIRST-YEAR SEMINAR TO INCREASE ACADEMIC SUCCESS FOR FIRST-GENERATION STUDENTS. FACULTY WILL LEAD THE SEMINAR AND WILL SERVE AS ADVISORS TO PARTICIPANTS. THE SEMINAR WILL FOCUS ON BUILDING FIRST-GENERATION STUDENTS' CAPACITY TO THINK CRITICALLY, ANALYZE, AND

**Part IV** Supplemental Information

SOLVE PROBLEMS, AND COMMUNICATE WITH OTHERS.

NAME OF ORGANIZATION OR GOVERNMENT: FLORIDA INTERNATIONAL UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: FLORIDA INTERNATIONAL UNIVERSITY

WILL FOLLOW COHORTS OF 150 FIRST-GENERATION, FIRST-YEAR STUDENTS THAT

WILL PARTICIPATE IN PILOT MATH-INTENSIVE FIRST-YEAR INTEREST GROUPS

INTENDED TO APPLY AND ASSESS BEST PRACTICES IN MATHEMATICS EDUCATION. A

FACULTY LEARNING COMMUNITY MADE OF STUDENT LEARNING COMMUNITY FACULTY

WILL CONVENE REGULARLY TO IMPROVE BEST PRACTICES AND PEDAGOGIES FOR

TEACHING GATEWAY MATHEMATICS COURSES AND ADDRESSING FIRST-GENERATION

STUDENTS' LEARNING NEEDS.

NAME OF ORGANIZATION OR GOVERNMENT:

RESEARCH FOUNDATION OF THE CITY UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: LAGUARDIA COMMUNITY COLLEGE IS

INTEGRATING A COHORT OF DEGREE-SEEKING, FIRST-GENERATION STUDENTS

SELECTED FROM ACADEMIC AND CAREER DEVELOPMENT PROGRAMS IN CONTINUING

EDUCATION (E.G., ESL, ADULT BASIC EDUCATION, AND GED) INTO THE COLLEGE'S

FIRST-YEAR ACADEMY PROGRAM. THE FIRST-YEAR ACADEMY PLACES STUDENTS IN ONE

OF THREE ACADEMIES (LIBERAL ARTS, ALLIED HEALTH, OR BUSINESS)

CONTEXTUALIZING SKILLS INSTRUCTION BY MAKING IT DISCIPLINE-BASED LINKING

COURSES THROUGH LEARNING COMMUNITIES.

NAME OF ORGANIZATION OR GOVERNMENT: NORTHWEST INDIAN COLLEGE

(H) PURPOSE OF GRANT OR ASSISTANCE: NIC IS BUILDING UPON AND

STRENGTHENING ITS FIRST-YEAR EXPERIENCE PROGRAM TO BETTER SERVE THE NEEDS

OF FIRST-GENERATION STUDENTS, IDENTIFYING AND INTEGRATING BEST PRACTICE

CLASSROOM MODELS FOR IMPROVING THE ACADEMIC SUCCESS OF STUDENTS; IDENTIFY

**Part IV** Supplemental Information

CULTURALLY RELEVANT TEACHING AND LEARNING APPROACHES; IMPROVE AND STANDARDIZE THE INTRODUCTION TO SUCCESSFUL LEARNING COURSE; AND EXPAND AND TAILOR THE FAMILY EDUCATION MODEL FOR THE PURPOSE OF CREATING A NETWORK OF SUPPORT SIMILAR TO THAT WHICH IS PROVIDED BY STUDENTS' FAMILIES.

NAME OF ORGANIZATION OR GOVERNMENT: CALIFORNIA STATE UNIVERSITY

(H) PURPOSE OF GRANT OR ASSISTANCE: THE CALIFORNIA STATE UNIVERSITY-FRESNO PROJECT TARGETS FIRST-GENERATION STUDENTS IN NEED OF ADDITIONAL PREPARATION IN MATH AND ENGLISH THROUGH THE IMPLEMENTATION OF INTEGRATED LEARNING COMMUNITIES FOCUSING ON READING, MATH, WRITTEN AND ORAL COMMUNICATION, CRITICAL THINKING, HISTORY AND GOVERNMENT. STUDENT SUCCESS GOALS INCLUDE INCREASED STUDENT LEARNING, INCREASED PERSISTENCE, AND INCREASED ENGAGEMENT.

NAME OF ORGANIZATION OR GOVERNMENT: BENNETT COLLEGE

(H) PURPOSE OF GRANT OR ASSISTANCE: BENNETT COLLEGE FOR WOMEN IS DEVELOPING FIRST-GENERATION STUDENT LEARNING COMMUNITIES. BEGINNING THE SUMMER PRIOR TO THE FALL SEMESTER, CONDITIONALLY ACCEPTED FIRST-GENERATION STUDENTS WILL TAKE THREE REQUIRED COURSES - ENGLISH, MATH, AND ORIENTATION - TO ACCELERATE REMEDIAL COURSEWORK REQUIREMENTS AND PROVIDE THEM WITH THE NECESSARY TOOLS TO SUCCESSFULLY COMPLETE CREDIT-BEARING COURSEWORK IN THEIR FIRST YEAR.

NAME OF ORGANIZATION OR GOVERNMENT: NAVAJO TECHNICAL COLLEGE

(H) PURPOSE OF GRANT OR ASSISTANCE: NAVAJO TECHNICAL COLLEGE WILL 1) IMPLEMENT COLLABORATIVE, INTERDISCIPLINARY, STUDENT-INITIATED RESEARCH PROJECTS DESIGNED TO INCREASE MOTIVATION TO ACHIEVE ACADEMIC SUCCESS FOR

**Part IV** Supplemental Information

THE COLLEGE'S FIRST-GENERATION STUDENTS; AND 2) INCREASE THE PERCENTAGE  
OF THE COLLEGE'S FIRST-GENERATION STUDENTS THAT CHOOSE TO EARN AN  
ASSOCIATE'S DEGREE AFTER EARNING THEIR CERTIFICATE.

**SCHEDULE O**

(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

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

OMB No 1545-0047

**2009**

Open to Public  
Inspection

Name of the organization

INSTITUTE FOR HIGHER EDUCATION POLICY

Employer identification number

52-1818907

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

SOCIAL DEVELOPMENT.

FORM 990, PART VI, SECTION B, LINE 11: THE 990 WAS PREPARED BY THE OUTSIDE ACCOUNTANTS AND REVIEWED BY SENIOR MANAGEMENT. THE DRAFT 990 FORM WAS PROVIDED ELECTRONICALLY TO THE BOARD. THIS WAS DONE WITH REVIEW FROM IHEP'S AUDIT COMMITTEE, WHICH REPORTED TO THE BOARD ABOUT THE FILING AND ASKED IF ANY OTHER MEMBER OF THE BOARD HAD ANY QUESTIONS/COMMENTS BEFORE FILING.

FORM 990, PART VI, SECTION B, LINE 12C: IHEP MONITORS THIS EACH YEAR BY REQUIRING THE BOARD MEMBERS AND EMPLOYEES TO DISCLOSE ANY NEW INFORMATION. THROUGHOUT THE YEAR, THE PRESIDENT IS ALERTED IF THERE ARE ANY CHANGES PRIOR TO THE YEARLY DISCLOSE.

FORM 990, PART VI, SECTION B, LINE 15A: THE MANAGEMENT DEVELOPMENT AND COMPENSATION COMMITTEE, WHICH IS MADE UP OF INDEPENDENT BOARD MEMBERS, ESTABLISHED PERFORMANCE GOALS AND OBJECTIVES, CONDUCTED YEAR-END REVIEWS, AND EVALUATED THESE (MEASUREABLE) PERFORMANCE GOALS. APPROPRIATE COMPENSATION, BASED ON INFORMAL COMPARISON OF LIKE ORGANIZATIONS, IS DETERMINED AND RECOMMENDED BY THE MDC COMMITTEE.

MANAGEMENT AND SUPERVISORS MUTUALLY ESTABLISH PERFORMANCE GOALS AND OBJECTIVES CONDUCTED AT YEAR-END AND REVIEW AND EVALUATE THESE (MEASUREABLE) PERFORMANCE GOALS. APPROPRIATE COMPENSATION, BASED ON INFORMAL COMPARISON OF LIKE ORGANIZATIONS, IS DETERMINED AND RECOMMENDED BY THE MDC COMMITTEE.

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule O (Form 990) 2009

932211  
02-03-10

**SCHEDULE O**

(Form 990)

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990**

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

OMB No 1545-0047

**2009**

Open to Public  
Inspection

Name of the organization

INSTITUTE FOR HIGHER EDUCATION POLICY

Employer identification number

52-1818907

FORM 990, PART VI, SECTION C, LINE 19: THE FINANCIAL STATEMENTS, GOVERNING  
DOCUMENTS, AND CONFLICT OF INTEREST POLICY ARE AVAILABLE UPON REQUEST.