Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

OMB No 1545-0047

2002

Open to Public Inspection

A For the 2002 calendar year, or tax year beginning 7/1/2002 **and ending** 6/30/2003

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Final return ☐ Amended return ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization: Facing History And Ourselves National Foundation, Inc

Number and street (or P O box if mail is not delivered to street address): 16 Hurd Road | Room/suite:

City or town: Brookline | State or country: MA | ZIP + 4: 024456919

D Employer identification number: 04-2761636

E Telephone number: 617-735-1627

F Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) ▶

• **Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)**

H and I are not applicable to section 527 organizations

H(a) Is this a group return for affiliates? ☐ Yes ☒ No

H(b) If "Yes" enter number of affiliates ▶

H(c) Are all affiliates included? ☐ Yes ☒ No (If No attach a list See instructions)

H(d) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☒ No

I Enter 4-digit GEN ▶

M Check ▶ ☐ if the organization is NOT required to attach Sch B (Form 990 990 EZ or 990-PF)

G Web site ▶ www facinghistory org

J ORGANIZATION TYPE (check only one) ▶ ☒ 501(c) (3) ◀ (insert no) ☐ 4947(a)(1) OR ☐ 527

K Check here ▶ ☐ if the organization s gross receipts are normally not more than $25 000 The organization need not file a return with the IRS but if the organization received a Form 990 Package in the mail it should file a return without financial data SOME STATES REQUIRE A COMPLETE RETURN

L Gross receipts Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 10,340,561

Part I **Revenue, Expenses, and Changes in Net Assets or Fund Balances** (See page 17 of the instructions)

Revenue	1	Contributions, gifts, grants, and similar amounts received			
	a	Direct public support	1a 9,465,403		
	b	Indirect public support	1b 0		
	c	Government contributions (grants)	1c 0		
	d	TOTAL (add lines 1a through 1c) (cash $ 9,465,403 noncash $ 0)		1d	9,465,403
	2	Program service revenue including government fees and contracts (from Part VII, line 93)		2	410,851
	3	Membership dues and assessments		3	0
	4	Interest on savings and temporary cash investments		4	0
	5	Dividends and interest from securities		5	350,953
	6 a	Gross rents	6a 0		
	b	Less rental expenses	6b 0		
	c	Net rental income or (loss) (subtract line 6b from line 6a)		6c	0
	7	Other investment income (describe ▶)		7	0
	8 a	Gross amount from sales of assets other than inventory	(A) Securities 0 / 8a / (B) Other 0		
	b	Less cost or other basis and sales expenses	0 / 8b / 0		
	c	Gain or (loss) (attach schedule)	0 / 8c / 0		
	d	Net gain or (loss) (combine line 8c, columns (A) and (B))		8d	0
	9	Special events and activities (attach schedule)			
	a	Gross revenue (not including $ 0 of contributions reported on line 1a)	9a 0		
	b	Less direct expenses other than fundraising expenses	9b 0		
	c	Net income or (loss) from special events (subtract line 9b from line 9a)		9c	0
	10 a	Gross sales of inventory, less returns and allowances	10a 113,354		
	b	Less cost of goods sold	10b 31,421		
	c	Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)		10c	81,933
	11	Other revenue (from Part VII line 103)		11	0
	12	TOTAL REVENUE (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)		12	10,309,140
Expenses	13	Program services (from line 44, column (B))		13	7,284,166
	14	Management and general (from line 44, column (C))		14	666,346
	15	Fundraising (from line 44, column (D))		15	2,089,158
	16	Payments to affiliates (attach schedule)		16	0
	17	TOTAL EXPENSES (add lines 16 and 44, column (A))		17	10,039,670
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 12)		18	269,470
	19	Net assets or fund balances at beginning of year (from line 73, column (A))		19	9,485,426
	20	Other changes in net assets or fund balances (attach explanation)		20	128,813
	21	Net assets or fund balances at end of year (combine lines 18, 19, and 20)		21	9,883,709

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SCANNED DEC 1 5 2003

Part II Statement of Functional Expenses All organizations must complete column (A) Columns (B) (C) and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others (See page 21 of the instructions)

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22 Grants and allocations (attach schedule) (cash $ noncash $)	22	0	0		
23 Specific assistance to individuals (attach schedule)	23	0	0		
24 Benefits paid to or for members (attach schedule)	24	0	0		
25 Compensation of officers, directors, etc	25	344,760	258,570	24,133	62,057
26 Other salaries and wages	26	5,399,128	3,824,728	463,896	1,110,504
27 Pension plan contributions	27	532,503	362,969	42,892	126,642
28 Other employee benefits	28	473,397	316,045	38,521	118,831
29 Payroll taxes	29	548,347	396,075	43,735	108,537
30 Professional fundraising fees	30	0	0	0	0
31 Accounting fees	31	43,432	23,509	17,187	2,736
32 Legal fees	32	0	0	0	0
33 Supplies	33	152,126	137,302	11,858	2,966
34 Telephone	34	181,000	169,965	1,185	9,850
35 Postage and shipping	35	154,067	117,070	447	36,550
36 Occupancy	36	250,106	243,771	1,857	4,478
37 Equipment rental and maintenance	37	54,410	52,805	726	879
38 Printing and publications	38	212,885	146,716	0	66,169
39 Travel	39	613,428	281,301	350	331,777
40 Conferences, conventions, and meetings	40	125,486	125,486	0	0
41 Interest	41	0	0	0	0
42 Depreciation, depletion, etc (attach schedule)	42	244,247	184,539	17,092	42,616
43 Other expenses not covered above (itemize) a Misc	43a	26,685	21,937	1,842	2,906
b Consultants	43b	580,627	564,279	625	15,723
c AV & Library Expenses	43c	22,937	22,937	0	0
d Events	43d	80,099	34,162	0	45,937
e	43e	0	0	0	0
f	43f	0	0	0	0
44 TOTAL FUNCTIONAL EXPENSES (add lines 22 through 43) ORGANIZATIONS COMPLETING COLUMNS (B)-(D) CARRY THESE TOTALS TO LINES 13-15	44	10,039,670	7,284,166	666,346	2,089,158

JOINT COSTS Check ▶ ☐ if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services? ▶ ☐ Yes ☐ No

If "Yes," enter (i) the aggregate amount of these joint costs $ ________, (ii) the amount allocated to Program services $ ________

(iii) the amount allocated to Management and general $ ________, and (iv) the amount allocated to Fundraising $

Part III Statement of Program Service Accomplishments (See page 24 of the instructions)

What is the organization's primary exempt purpose? ▶ Not for profit-education

All organizations must describe their exempt purpose achievements in a clear and concise manner State the number of clients served publications issued etc Discuss achievements that are not measurable (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others)

	Program Service Expenses (Required for 501(c)(3) and (4) orgs and 4947(a)(1) trusts but optional for others)
a Facing History and Ourselves is a National Educational and Professional development organization whose mission is to engage students of diverse backgrounds in an examination of racism, prejudice and antisemitism in order to promote the development of a more humand and informed citizenry By studying the historical development and the lessons of the Holocaust and other (Grants and allocations $)	7,284,166
b examples of collective violence, students make the essential connection between history and the moral choices they confront in their own lives (Grants and allocations $)	0
c (Grants and allocations $)	0
d (Grants and allocations $)	0
e Other program services (attach schedule) (Grants and allocations $)	0
f TOTAL OF PROGRAM SERVICE EXPENSES (should equal line 44, column (B), Program services) ▶	7,284,166

Part IV **Balance Sheets** (See page 24 of the instructions)

	Note	*Where required, attached schedules and amounts within the description column should be for end-of-year amounts only*			(A) Beginning of year		(B) End of year
Assets	45	Cash - non-interest-bearing			548,954	45	459,525
	46	Savings and temporary cash investments			5,320,771	46	6,114,584
	47 a	Accounts receivable	47a	47,449			
	b	Less allowance for doubtful accounts	47b	1,588	67,032	47c	45,861
	48 a	Pledges receivable	48a	2,877,000			
	b	Less allowance for doubtful accounts	48b	109,251	2,992,000	48c	2,767,749
	49	Grants receivable			0	49	0
	50	Receivables from officers directors, trustees, and key employees (attach schedule)			0	50	0
	51 a	Other notes and loans receivable (attach schedule)	51a	0			
	b	Less allowance for doubtful accounts	51b	0	0	51c	0
	52	Inventories for sale or use			46,110	52	48,017
	53	Prepaid expenses and deferred charges			149,953	53	228,272
	54	Investments - securities (attach schedule) ▶ ☐ Cost ☐ FMV			0	54	0
	55 a	Investments - land, buildings, and equipment basis	55a	0			
	b	Less accumulated depreciation (attach schedule)	55b	0	0	55c	0
	56	Investments - other (attach schedule)			0	56	0
	57 a	Land, buildings, and equipment basis	57a	2,461,556			
	b	Less accumulated depreciation (attach schedule)	57b	2,170,635	500,590	57c	290,921
	58	Other assets (describe ▶ Interest Receivable-See attached Schedule)			0	58	19,616
	59	TOTAL ASSETS (add lines 45 through 58) (must equal line 74)			9,625,410	59	9,974,545
Liabilities	60	Accounts payable and accrued expenses			126,845	60	70,151
	61	Grants payable			0	61	0
	62	Deferred revenue			13,139	62	20,685
	63	Loans from officers, directors, trustees, and key employees (attach schedule)			0	63	0
	64 a	Tax-exempt bond liabilities (attach schedule)			0	64a	0
	b	Mortgages and other notes payable (attach schedule)			0	64b	0
	65	Other liabilities (describe ▶)			0	65	0
	66	TOTAL LIABILITIES (add lines 60 through 65)			139,984	66	90,836
Net Assets or Fund Balances		**Organizations that follow SFAS 117, check here** ▶ ☒ and complete lines 67 through 69 and lines 73 and 74					
	67	Unrestricted			4,343,253	67	4,760,833
	68	Temporarily restricted			2,992,000	68	2,972,703
	69	Permanently restricted			2,150,173	69	2,150,173
		Organizations that do not follow SFAS 117, check here ▶ ☐ and complete lines 70 through 74					
	70	Capital stock, trust principal, or current funds			0	70	0
	71	Paid-in or capital surplus, or land, building, and equipment fund			0	71	0
	72	Retained earnings, endowment, accumulated income, or other funds			0	72	0
	73	TOTAL NET ASSETS OR FUND BALANCES (add lines 67 through 69 OR lines 70 through 72, column (A) MUST equal line 19, column (B) MUST equal line 21)			9,485,426	73	9,883,709
	74	TOTAL LIABILITIES AND NET ASSETS / FUND BALANCES (add lines 66 and 73)			9,625,410	74	9,974,545

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization How the public perceives an organization in such cases may be determined by the information presented on its return Therefore please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments

Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return (See page 26 of the instructions)

a	Total revenue gains, and other support per audited financial statements ▶	a	11,251,490
b	Amounts included on line a but not on line 12 Form 990		
	(1) Net unrealized gains on investments $ 128,813		
	(2) Donated services and use of facilities $ 782,116		
	(3) Recoveries of prior year grants $ 0		
	(4) Other (specify) $ 0		
	Add amounts on lines (1) through (4) ▶	b	910,929
c	Line a minus line b ▶	c	10,340,561
d	Amounts included on line 12, Form 990 but not on line a		
	(1) Investment expenses not included on line 6b, Form 990 $ 0		
	(2) Other (specify) Cost Bks Sold $ -31,421		
	Add amounts on lines (1) and (2) ▶	d	-31,421
e	Total revenue per line 12, Form 990 (line c plus line d) ▶	e	10,309,140

Part IV-B Reconciliation of Expenses per Audited Financial Statements with Expenses per Return

a	Total expenses and losses per audited financial statements ▶	a	10,853,207
b	Amounts included on line a but not on line 17, Form 990		
	(1) Donated services and use of facilities $ 782,116		
	(2) Prior year adjustments reported on line 20, Form 990 $ 0		
	(3) Losses reported on line 20, Form 990 $ 0		
	(4) Other (specify) Cost Bks Sold $ 31,421		
	Add amounts on lines (1) through (4) ▶	b	813,537
c	Line a minus line b ▶	c	10,039,670
d	Amounts included on line 17, Form 990 but not on line a		
	(1) Investment expenses not included on line 6b, Form 990 $ 0		
	(2) Other (specify) $ 0		
	Add amounts on lines (1) and (2) ▶	d	0
e	Total expenses per line 17, Form 990 (line c plus line d) ▶	e	10,039,670

Part V List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated, see page 26 of the 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 & deferred compensation	(E) Expense account and other allowances
Margot Stern Strom (Officer) 22 Kennard Road, Brookline, MA 02445	President/Exec Dir 40	222,768	22,277	0
Martin Sleeper (Key Employee) 206 Willowbank Drive, Wayland, MA 0177	Dir Operations 40	121,992	12,199	0

75 Did any officer, director, trustee, or key employee receive aggregate compensation of more than $100 000 from your organization and all related organizations of which more than $10 000 was provided by the related organizations? ▶ ☐ Yes ☒ No
If "Yes," attach schedule-see page 26 of the instructions

Part VI Other Information (See page 27 of the instructions)

		Line	Yes	No
76	Did the organization engage in any activity not previously reported to the IRS? If "Yes " attach a detailed description of each activity	76		X
77	Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes	77		X
78 a	Did the organization have unrelated business gross income of $1 000 or more during the year covered by this return?	78a		X
b	If "Yes," has it filed a tax return on FORM 990-T for this year?	78b		X
79	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes " attach a statement	79		X
80 a	Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc , to any other exempt or nonexempt organization?	80a	X	
b	If "Yes," enter the name of the organization ▶ Friends of Facing History And Ourselves and check whether it is [X] exempt OR [ ] nonexempt			
81 a	*Enter direct or indirect political expenditures See line 81 instructions* — 81a: 0			
b	Did the organization file FORM 1120-POL for this year?	81b		X
82 a	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?	82a	X	
b	If "Yes," you may indicate the value of these items here Do not include this amount as revenue in Part I or as an expense in Part II (See instructions in Part III) — 82b: 782,116			
83 a	Did the organization comply with the public inspection requirements for returns and exemption applications?	83a	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?	83b	X	
84 a	Did the organization solicit any contributions or gifts that were not tax deductible?	84a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	84b	N/A	
85	501(c)(4), (5), or (6) organizations a Were substantially all dues nondeductible by members?	85a	N/A	
b	Did the organization make only in-house lobbying expenditures of $2,000 or less? If "Yes" was answered to either 85a or 85b, DO NOT complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year	85b	N/A	
c	Dues, assessments, and similar amounts from members — 85c: N/A			
d	Section 162(e) lobbying and political expenditures — 85d: N/A			
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices — 85e: N/A			
f	Taxable amount of lobbying and political expenditures (line 85d less 85e) — 85f: N/A			
g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	85g	N/A	
h	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?	85h	N/A	
86	501(c)(7) orgs Enter a Initiation fees and capital contributions included on line 12 — 86a: N/A			
b	Gross receipts, included on line 12, for public use of club facilities — 86b: N/A			
87	501(c)(12) orgs Enter a Gross income from members or shareholders — 87a: N/A			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them) — 87b: N/A			
88	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? If "Yes," complete Part IX	88		X
89 a	501(c)(3) organizations Enter Amount of tax imposed on the organization during the year under section 4911 ▶ 0 , section 4912 ▶ 0 , section 4955 ▶ 0			
b	501(c)(3) and 501(c)(4) orgs Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction	89b		X
c	Enter Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958 ▶ N/A			
d	Enter Amount of tax on line 89c, above, reimbursed by the organization ▶ N/A			
90 a	List the states with which a copy of this return is filed ▶ MA, NY			
b	Number of employees employed in the pay period that includes March 12, 2002 (See instructions) — 90b: 104			
91	The books are in care of ▶ Margot Stern Strom Telephone no ▶ 617-735-1627 Located at ▶ 16 Hurd Road, Brookline, MA ZIP + 4 ▶ 02445-6919			
92	Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of FORM 1041 - Check here ▶ [ ] and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 92			

Part VII Analysis of Income-Producing Activities (See page 31 of the instructions)

Note: *Enter gross amounts unless otherwise indicated*	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue					
a Fees (workshops)					410,851
b					
c					
d					
e					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	350,953	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					81,933
103 Other revenue a					
b					
c					
d					
e					
104 Subtotal (add columns (B), (D), and (E))		0		350,953	492,784

105 TOTAL (add line 104, columns (B), (D), and (E)) ▶ 843,737

Note: *Line 105 plus line 1d, Part I, should equal the amount on line 12, Part I*

Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes (See page 32 of the instructions)

Line No ▼	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
93a	Fees to provide teacher training, workshops, resource materials and speakers in conjunction with curriculum development and teacher training.
102	Sale of Resource Books part of teacher training.

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See page 32 of the instructions)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
	%			
N/A	%			
	%			
	%			

Part X Information Regarding Transfers Associated with Personal Benefit Contracts (See page 33 of the instructions)

(a) 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? ☐ Yes ☐ No

Note: *If "Yes" to (b), file Form 8870 AND Form 4720 (see instructions)*

[redacted] m, including accompanying schedules and statements, and to the best of my knowledge [redacted] r (other than officer) is based on all information of which preparer has any knowledge

[redacted] 11/7/03
Date

[redacted]

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Organization Exempt Under Section 501(c)(3)

(Except Private Foundation) and Section 501(e), 501(f), 501(k), 501(n), or Section 4947(a)(1) Nonexempt Charitable Trust
Supplementary Information - (See separate instructions.)
MUST be completed by the above organizations and attached to their Form 990 or 990-EZ

OMB No 1545-0047

2002

Name of the organization: Facing History And Ourselves National Foundation, Inc

Employer identification number: 04-2761636

Part I **Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees**
(See page 1 of the instructions List each one If there are 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 & deferred compensation	(e) Expense account and other allowances
Durney, Michael 16 Hurd Rd Brookline, MA 02445	MIS Director	128,941	12,894	0
Meltzer, Bonnie 16 Hurd Road Brookline, MA 02445	VP Development	128,941	12,894	0
Skvirsky, Marc 16 Hurd Road Brookline, MA 02445	VP Program	128,941	12,894	0
Tollefson, Terry 16 Hurd Road Brookline, MA 02445	Dir Administration	100,766	10,077	0
Stokes, Chris 16 Hurd Road Brookline, MA 02445	Assoc Dir Devel	93,350	9,335	0
Total number of other employees paid over \$50,000	52			

Part II **Compensation of the Five Highest Paid Independent Contractors for Professional Services**
(See page 2 of the instructions List each one (whether individuals or firms) If there are none, enter "None ")

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over \$50,000 for professional services	0	

Part III Statements About Activities (See page 2 of the instructions)

			Yes	No
1	During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities $ 0 (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B)	1		X
	Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A Other organizations checking "Yes," must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities			
2	During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director trustee, majority owner, or principal beneficiary? (If the answer to any question is "Yes," attach a detailed statement explaining the transactions)			
a	Sale, exchange, or leasing of property?	2a		X
b	Lending of money or other extension of credit?	2b		X
c	Furnishing of goods, services, or facilities?	2c		X
d	Payment of compensation (or payment or reimbursement of expenses if more than $1,000)?	2d	X	
e	Transfer of any part of its income or assets?	2e		X
3	Does the organization make grants for scholarships, fellowships, student loans, etc ? (See NOTE below)	3		X
4	Do you have a section 403(b) annuity plan for your employees?	4	X	

Note *Attach a statement to explain how the organization determines that individuals or organizations receiving grants or loans from it in furtherance of its charitable programs "qualify" to receive payments*

Part IV Reason for Non-Private Foundation Status (See pages 3 through 5 of the instructions)

The organization is not a private foundation because it is (Please check only ONE applicable box)

5 ☐ A church, convention of churches, or association of churches Section 170(b)(1)(A)(i)

6 ☐ A school Section 170(b)(1)(A)(ii) (Also complete Part V)

7 ☐ A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)

8 ☐ A Federal, state, or local government or governmental unit Section 170(b)(1)(A)(v)

9 ☐ A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii) ENTER THE HOSPITAL'S NAME, CITY, AND STATE

10 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the SUPPORT SCHEDULE in Part IV-A)

11 a ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(vi) (Also complete the SUPPORT SCHEDULE in Part IV-A)

11 b ☐ A community trust Section 170(b)(1)(A)(vi) (Also complete the SUPPORT SCHEDULE in Part IV-A)

12 ☐ 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 charitable etc , 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) (Also complete the SUPPORT SCHEDULE in Part IV-A)

13 ☐ An organization that is not controlled by any disqualified persons (other than foundation managers) and supports organizations described in (1) lines 5 through 12 above, or (2) section 501(c)(4), (5), or (6), if they meet the test of section 509(a)(2) (See section 509(a)(3))

Provide the following information about the supported organizations (See page 5 of the instructions)

(a) Name(s) of supported organization(s)	(b) Line number from above
N/A	

14 ☐ An organization organized and operated to test for public safety Section 509(a)(4) (See page 5 of the instructions)

Part IV-A Support Schedule (Complete only if you checked a box on line 10, 11, or 12) USE CASH METHOD OF ACCOUNTING

Note *You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting*

	Calendar year (or fiscal year beginning in)	(a) 2001	(b) 2000	(c) 1999	(d) 1998	(e) Total
15	Gifts, grants, and contributions received (Do not include unusual grants See line 28)	8,806,099	9,138,341	9,080,740	10,582,186	37,607,366
16	Membership fees received	0	0	0	0	0
17	Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to the organization's charitable, etc , purpose	395,657	556,297	618,432	504,463	2,074,849
18	Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)) rents royalties and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	268,794	290,023	244,063	193,292	996,172
19	Net income from unrelated business activities not included in line 18	0	0	0	0	0
20	Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf	0	0	0	0	0
21	The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge	0	0	0	0	0
22	Other income Attach a schedule Do not include gain or (loss) from sale of capital assets	0	0	0	0	0
23	Total of lines 15 through 22	9,470,550	9,984,661	9,943,235	11,279,941	40,678,387
24	Line 23 minus line 17	9,074,893	9,428,364	9,324,803	10,775,478	38,603,538
25	Enter 1% of line 23	94,706	99,847	99,432	112,799	

26	ORGANIZATIONS DESCRIBED ON LINES 10 OR 11 **a** Enter 2% of amount in column (e) line 24	26a	772,071
b	Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1998 through 2001 exceeded the amount shown in line 26a DO NOT FILE THIS LIST WITH YOUR RETURN Enter the total of all these excess amounts	26b	1,849,921
c	Total support for section 509(a)(1) test Enter line 24 column (e)	26c	38,603,538
d	Add Amounts from column (e) for lines 18 996,172 19 0 22 0 26b 1,849,921	26d	2,846,093
e	Public support (line 26c minus line 26d total)	26e	35,757,445
f	PUBLIC SUPPORT PERCENTAGE (LINE 26E (NUMERATOR) DIVIDED BY LINE 26C (DENOMINATOR))	26f	92 63%

27 ORGANIZATIONS DESCRIBED ON LINE 12 **a** For amounts included in lines 15 16, and 17 that were received from a "disqualified person " prepare a list for your records to show the name of, and total amounts received in each year from each disqualified person " DO NOT FILE THIS LIST WITH YOUR RETURN Enter the sum of such amounts for each year

(2001) ______ (2000) ______ (1999) ______ (1998) ______

b For any amount included in line 17 that was received from each person (other than "disqualified persons") prepare a list for your records to show the name of, and amount received for each year, that was more than the LARGER of (1) the amount on line 25 for the year or (2) $5 000 (Include in the list organizations described in lines 5 through 11 as well as individuals) DO NOT FILE THIS LIST WITH YOUR RETURN After computing the difference between the amount received and the larger amount described in (1) or (2) enter the sum of these differences (the excess amounts) for each year

(2001) ______ (2000) ______ (1999) ______ (1998) ______

c	Add Amounts from column (e) for lines 15 0 16 0 17 0 20 0 21 0	27c	0
d	Add Line 27a total 0 and line 27b total 0	27d	0
e	Public support (line 27c total minus line 27d total)	27e	0
f	Total support for section 509(a)(2) test Enter amount from line 23 column (e) 27f 0		
g	PUBLIC SUPPORT PERCENTAGE (LINE 27E (NUMERATOR) DIVIDED BY LINE 27F (DENOMINATOR))	27g	0 00%
h	INVESTMENT INCOME PERCENTAGE (LINE 18, COLUMN (E) (NUMERATOR) DIVIDED BY LINE 27F (DENOMINATOR))	27h	0 00%

28 UNUSUAL GRANTS For an organization described in line 10, 11 or 12 that received any unusual grants during 1998 through 2001 prepare a list for your records to show for each year the name of the contributor the date and amount of the grant and a brief description of the nature of the grant DO NOT FILE THIS LIST WITH YOUR RETURN Do not include these grants in line 15

Part V **Private School Questionnaire** (See page 7 of the instructions)
(To be completed ONLY by schools that checked the box on line 6 in Part IV) N/A

			Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	29		
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	30		
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe, if "No," please explain (If you need more space, attach a separate statement)	31		
32	Does the organization maintain the following			
a	Records indicating the racial composition of the student body, faculty, and administrative staff?	32a		
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	32b		
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	32c		
d	Copies of all material used by the organization or on its behalf to solicit contributions? If you answered "No" to any of the above, please explain (If you need more space attach a separate statement)	32d		
33	Does the organization discriminate by race in any way with respect to			
a	Students' rights or privileges?	33a		
b	Admissions policies?	33b		
c	Employment of faculty or administrative staff?	33c		
d	Scholarships or other financial assistance?	33d		
e	Educational policies?	33e		
f	Use of facilities?	33f		
g	Athletic programs?	33g		
h	Other extracurricular activities? If you answered "Yes" to any of the above, please explain (If you need more space attach a separate statement)	33h		
34 a	Does the organization receive any financial aid or assistance from a governmental agency?	34a		
b	Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b, please explain using an attached statement	34b		
35	Does the organization certify that it has complied with the applicable requirements of sections 4 01 through 4 05 of Rev Proc 75-50, 1975-2 C B 587, covering racial nondiscrimination? If "No," attach an explanation	35		

Part VI-A Lobbying Expenditures by Electing Public Charities (See page 9 of the instructions)
(To be completed ONLY by an eligible organization that filed Form 5768)

Check a ☐ if the organization belongs to an affiliated group Check b ☐ if you checked "a" and "limited control" provisions apply

	Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred)		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
36	Total lobbying expenditures to influence public opinion (grassroots lobbying)	36		
37	Total lobbying expenditures to influence a legislative body (direct lobbying)	37		
38	Total lobbying expenditures (add lines 36 and 37)	38	0	0
39	Other exempt purpose expenditures	39		
40	Total exempt purpose expenditures (add lines 38 and 39)	40	0	0
41	Lobbying nontaxable amount Enter the amount from the following table -	41	0	0
42	Grassroots nontaxable amount (enter 25% of line 41)	42	0	0
43	Subtract line 42 from line 36 Enter -0- if line 42 is more than line 36	43	0	0
44	Subtract line 41 from line 38 Enter -0- if line 41 is more than line 38	44	0	0

If the amount on line 40 is -	The lobbying nontaxable amount is -
Not over $500,000	20% of the amount on line 40
Over $500,000 but not over $1 000,000	$100,000 plus 15% of the excess over $500 000
Over $1 000,000 but not over $1,500,000	$175 000 plus 10% of the excess over $1 000,000
Over $1 500,000 but not over $17 000,000	$225,000 plus 5% of the excess over $1 500,000
Over $17,000 000	$1 000,000

Caution *If there is an amount on either line 43 or line 44, you must file Form 4720*

4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below See the instructions for lines 45 through 50 on page 11 of the instructions)

	Lobbying Expenditures During 4-Year Averaging Period				
Calendar year (or fiscal year beginning in)	(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total
45 Lobbying nontaxable amount					0
46 Lobbying ceiling amount (150% of line 45(e))					0
47 Total lobbying expenditures					0
48 Grassroots nontaxable amount					0
49 Grassroots ceiling amount (150% of line 48(e))					0
50 Grassroots lobbying expenditures					0

Part VI-B Lobbying Activity by Nonelecting Public Charities
(For reporting only by organizations that did not complete Part VI-A) (See page 11 of the instructions)

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of	Yes	No	Amount
a Volunteers		X	
b Paid staff or management (Include compensation in expenses reported on lines c through h)		X	
c Media advertisements		X	
d Mailings to members, legislators, or the public		X	
e Publications, or published or broadcast statements		X	
f Grants to other organizations for lobbying purposes		X	
g Direct contact with legislators, their staffs government officials or a legislative body		X	
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means		X	
i Total lobbying expenditures (Add lines c through h)			0

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities

Part VII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations (See page 12 of the instructions)

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

		Yes	No
a Transfers from the reporting organization to a noncharitable exempt organization of			
(i) Cash	51a(i)		X
(ii) Other assets	a(ii)		X
b Other transactions			
(i) Sales or exchanges of assets with a noncharitable exempt organization	b(i)		X
(ii) Purchases of assets from a noncharitable exempt organization	b(ii)		X
(iii) Rental of facilities, equipment, or other assets	b(iii)		X
(iv) Reimbursement arrangements	b(iv)		X
(v) Loans or loan guarantees	b(v)		X
(vi) Performance of services or membership or fundraising solicitations	b(vi)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	c		X

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

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

FACING HISTORY AND OURSELVES NATIONAL FOUNDATION, INC

04 - 2761636
Form 990 2002-2003

Part I, Line 10 Gross Profit on Sales of Inventory

Gross revenue from sales of assets held for inventory in the course of rendering program services during the Fiscal Year ending 6/30/03 totalled $113,354 Cost of Goods Sold expense directly related to the production of such services was $31,421 and reported in Part I, Line 10b

5260Books sold at a cost of@$3 09	$16,253
1060Books sold at a cost of@3 23	$3,424
50 Books sold at a cost of @$2 57	$128
1320 Books sold at a cost of @ $ 89	$1,175
504 Books sold at a cost of@$3 29	$1,658
2142 Books sold at a cost of @4 10	$8,783
Total Cost of Books Sold	$31,421

FACING HISTORY AND OURSELVES NATIONAL FOUNDATION, INC

04-2761636
Form 990 2002-2003

Part I, Line 20 Other changes in net assets or fund balances

Unrealized Gain on Investments (Vanguard,CJP)	$128,813

FACING HISTORY AND OURSELVES NATIONAL FOUNDATION, INC

04-2761636
Form 990 2002-2003

Part IV, Line 58 Investments-other Interest Receivable

June Interest-Vanguard Account	$11,459
June Interest-CJP Investment	8,157
TOTAL-Line 58	$19,616

Facing History And Ourselves National Foundation, Inc.
04-2761636
Form 990 2002-2003

Part II, Line 42 Schedule of Depreciation AND
Part IV, Line 57(b) Land, Buildings, and Equipment

	Office Equipment		Leasehold Improvements		TOTAL	
	6/30/03	6/30/02	6/30/03	6/30/02	6/30/03	6/30/02
Basis	$1,401,603	$1,367,024	$1,059,953	$1,059,953	$2,461,556	$2,426,977
Accum Depreciation	($1,257,034)	($1,083,432)	($913,601)	($842,955)	($2,170,635)	($1,926,387)
Net	$144,569	$283,592	$146,352	$216,998	$290,921	$500,590

Depreciation Fy 02-03

Equipment	$144,569
Leasehold Improvements	146,352
Total	$290,921

Facing History And Ourselves National Foundation
Form 990- 2002-2003 04 - 2761636

Part IV, Line 62 Support & Revenue Designated for Future periods

Description	Amount	Applicable
Prepaid Workshop Fees	$20,685	2003-04
Total	$20,685	

Facing History And Ourselves National Foundation, Inc.
990 Part V
04-2761636

Board of Trustees 2002-2003

**The Board of Trustees includes the Board of Directors - listed separately*

David P. Fialkow
General Catalyst Partners
Board of Directors, The Crohn's and Colitis Foundation
Board of Directors, Steppingstone Foundation
Board of Directors, Boys & Girls Clubs of Boston
Board of Trustees, Beth Israel Deaconess Medical Center
Board of Directors, Pan-Mass Challenge
Boston, Massachusetts
1997

Mark S. Fife
Entrust Capital Inc
New York, NY
2002

Esther F. Gens
Resource Speaker, Facing History and Ourselves
Brookline, Massachusetts
1988

Sol Gittleman
The Alice and Nathan Gantcher Distinguished University Professor, Tufts University
Medford, Massachusetts
1988

Daniel J. Givelber
Professor, Northeastern Law School
Boston, Massachusetts
1988

Iris Harkavy
Board, Memphis Jewish Federation
Board, Memphis Jewish Community Center
Board, Memphis Public Arts Commission
Memphis, Tennessee
1999

Veronica Ho
Founding Partner, StoneRiver Capital
Jackson, Wyoming
2000

Jill Iscol
The Iscol Family Foundation
Pound Ridge, NY
2002

Jonathon S. Jacobson
Founder, Highfields Capital Management
National Trustee, Gilman School of Baltimore, MD
Boston, Massachusetts
1997

Jackie Jenkins-Scott
President, Dimock Community Health Center
Boston, Massachusetts
1995

Floy B. Kaminski
Board of Overseers,
William Davidson Graduate School of Education at the Jewish Theological Seminary
Advisory Board, The Town School
Board, Commission for Jewish Identity and Renewal at UJA-Federation of New York
New York, New York
1997

Eliot Levinson
President, The Brennan/Levinson Enterprise
Washington, D C
1994

Karen S. Levy
Newsletter Editor, Wellesley College Hillel
Co-Chair, Program Committee, Young Audiences of Massachusetts
Vice President, Board of Governors, Handel & Haydn Society
Wellesley, Massachusetts
1995

Susan Hastings Mallory
Cordova, Tennessee
2000

Richard Melcher
Melcher & Tucker Consultants
Chicago, Il
2002

Karan A. Merry
Head of School, St Paul's Episcopal School
Oakland, California
1993

William C. Miller
Teacher, Concord Middle School
Concord, Massachusetts
1994

Jo Ann Nathan
Chicago, Illinois
1997

Scott A. Nathan
The Baupost Group, LLC
Boston, Massachusetts
1997

Bernard Pucker
Director, Pucker Gallery
Director, Friends of Copley Square, Newbury Street League
Boston Art Dealers Association
Director, Temple Kehilleth Israel of Brookline
Director, Jewish Publication Society, Philadelphia
Board of Overseers, The Children's Museum
Boston, Massachusetts
1995

Lawrence J. Ramer
Chairman, Ramer Equities, Incorporated
Los Angeles, California
2000

Daniel E. Rothenberg
President, C & R Management Corp
Chestnut Hill, Massachusetts
1983

Michael K. Sapers
Sapers & Wallack
Cambridge, Massachusetts
1992

Rhoda B. Sapers
Board of Trustees, Berklee College of Music
Vice-President of Council, Brandeis Adult Learning Institute
Boston, Massachusetts
1983

Mike Slosberg
Co-Founder (retired), Digitas, Inc
New York, New York
1997

Dana W. Smith
Board Member, Park School
Board Member, Boys & Girls Clubs of Boston
Board Member, Frances Jacobsen Early Childhood Center
Board Member, National Conference on Community and Justice
Wellesley, Massachusetts
2000

Donald Stern
Bingham McCutchen, LLP
Boston, MA
2002

Gerald M. Stern
Attorney
Washington, D C
1983

Kenneth A. Sweder
Partner, Sweder & Ross, LLP
Boston, Massachusetts
1992

Susan W. Tofias, MSW
Wellesley Education Foundation
Wellesley Town Meeting Member
Wellesley, Massachusetts
1995

Jay Veevers
Marketing Consultant, Veevers Associates
Board, Brookline Greenspace Alliance
Advisory Board, Provincetown Art Association and Museum
Advisory Council, Arnold Arboretum
Advisory Council, Gateway Arts
Board Member, Brookline Arts Center
Brookline, Massachusetts
1983

Jane Walters
Principal, Grizzlies Academy
Memphis, TN
2002

Linda Whitlock
President & CEO, Boys & Girls Clubs of Boston
Boston, Massachusetts
1997

Judy Wise
Senior Director, International
Chicago, Facing History & Ourselves
Board, Business & Professional People for the Public Interest
Chicago, Illinois
1990

Kenneth J. Witkin
Managing Director, Real Estate Finance Group
FleetBoston Financial
Boston, Massachusetts
1998

Manoog S. Young
Chairman, Board of Directors
National Association for Armenian Studies and Research
Belmont, Massachusetts
1983

Henry C. Zabierek
Educational Consultant
Brookline, Massachusetts
1983

Jane Zinner
Consultant
San Francisco, CA
2001

National Board of Directors

Chair
Seth A. Klarman
President, The Baupost Group, LLC
Boston, Massachusetts
1990

Vice Chairs
Ronald G. Casty
Chairman of the Board and President, Chelsea Industries, Inc
Peabody, Massachusetts
1985

Karen G. Harrison
Vice-Chair, Facing History Chicago Advisory Board
Board Member & Past Chair, Chicago Children's Museum
Chicago, Illinois
1995

Ellen M. Poss, M.D.
Psychiatrist
Trustee, Dimock Community Center Foundation Board
Vice Chair, Institute of Contemporary Art, Boston
Brookline, Massachusetts
1990

Karen Sulzberger
Chair, Facing History Los Angeles Advisory Board
Beverly Hills, California
1998

Treasurer
Robert A. Smith
Vice Chairman, The Neiman Marcus Group, Inc
Managing Partner, Castanea Partners, Inc
Chestnut Hill, Massachusetts
1995

Secretary/Clerk
Sandra P. Gordon
Chair of the Foundation Board
Boston Arts Academy
Boston, Massachusetts
1983

President
Margot Stern Strom
Executive Director
Facing History and Ourselves
Brookline, Massachusetts
1982

Salary $222,768
Benefit 22,277

Members
Paul H. Berz
Chair, Facing History Memphis Advisory Board
Managing Director, Highland Capital Management
Board Member, Memphis Jewish Home
Memphis, Tennessee
2000

Rev. Robert W. Bullock
Chair, Facing History National Scholars Board
Pastor, Our Lady of Sorrows Church
Sharon, Massachusetts
1983

Howard J. Freedman
Chair, Facing History Cleveland Advisory Board
Partner, Weiss & Freedman, LLP
Chagrin Falls, Ohio
2001

Kathy Fuld
Greenwich, Connecticut
1997

Ruthanne Fuller
Strategic Planner
Board of Overseers, WGBH
Chair, Facing History National Committee on Governance
Member of the Corporation, Belmont Hill School
Member, Brown University Annual Fund Leadership Council
Newton, Massachusetts
1997

Philip H. Gordon
Gordon Brothers Retail Partners (Retired)
Chair, EdVestors
Boston, Massachusetts
1989

Elizabeth E. Jick
Managing Director, Zions Bank
Board Member, Anti-Defamation League
Board Member, Beaver Country Day School
Chestnut Hill, Massachusetts
1997