

990

Return of Organization Exempt From Income Tax

OMB No. 1545-

0047 2023

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations) Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

A For the 2023 calendar year, or tax year beginning 10-01-2023, and ending 09-30-2024

- B Check if applicable: Address change, Name change, Initial return, Final return/terminated, Amended return, Application pending

C Name of organization: INSTITUTE OF INTERNATIONAL EDUCATION INC. Doing business as: Number and street (or P.O. box if mail is not delivered to street address): Room/suite: 1 WORLD TRADE CTR FL 36 City or town, state or province, country, and ZIP or foreign postal code: NEW YORK, NY 100070090

D Employer identification number: 13-1624046 E Telephone number: (212) 883-8200 G Gross receipts \$ 467,682,998

F Name and address of principal officer: JASON P CZYZ 1 WORLD TRADE CTR FL 36 NEW YORK, NY 100070090

H(a) Is this a group return for subordinates? H(b) Are all subordinates included? H(c) Group exemption number

I Tax-exempt status: 501(c)(3) 501(c) ( ) (insert no.) 4947(a)(1) or 527

J Website: WWW.IIE.ORG

K Form of organization: Corporation Trust Association Other

L Year of formation: 1919 M State of legal domicile: NY

Part I Summary

1 Briefly describe the organization's mission or most significant activities: HELP PEOPLE AND ORGANIZATIONS LEVERAGE THE POWER OF INT'L EDUCATION - CONTINUED IN SCHEDULE OTO THRIVE IN TODAY'S WORLD THROUGH SCHOLARSHIP, EXCHANGE, SCHOLAR RESCUE, AND OTHER HIGHER EDUCATION PROGRAMS.

Table with 2 columns: Description, Amount. Rows 2-7a: 2 Check this box, 3 Number of voting members (30), 4 Number of independent voting members (29), 5 Total number of individuals employed (576), 6 Total number of volunteers (2,134), 7a Total unrelated business revenue (-23,791)

Table with 3 columns: Description, Prior Year, Current Year. Rows 8-12: 8 Contributions and grants (304,485,661 / 318,467,937), 9 Program service revenue (32,877,572 / 31,403,702), 10 Investment income (9,654,217 / 45,585,414), 11 Other revenue (24,468 / 4,674), 12 Total revenue (347,041,918 / 395,461,727)

Table with 3 columns: Description, Prior Year, Current Year. Rows 13-19: 13 Grants and similar amounts paid (221,013,297 / 224,826,431), 14 Benefits paid to or for members (0 / 0), 15 Salaries, other compensation, employee benefits (63,635,773 / 68,712,012), 16a Professional fundraising fees (0 / 0), 16b Total fundraising expenses (2,068,692), 17 Other expenses (49,175,280 / 50,348,790), 18 Total expenses (333,824,350 / 343,887,233), 19 Revenue less expenses (13,217,568 / 51,574,494)

Table with 3 columns: Description, Beginning of Current Year, End of Year. Rows 20-22: 20 Total assets (424,763,200 / 486,882,155), 21 Total liabilities (140,058,045 / 144,327,212), 22 Net assets or fund balances (284,705,155 / 342,554,943)

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: Signature of officer AMY EAPPEN SENIOR VICE PRESIDENT AND CFO, Date 2025-07-17. Paid Preparer Use Only: Print/Type preparer's name, Preparer's signature, Date, Check if self-employed, PTIN P01390592, Firm's name GRANT THORNTON ADVISORS LLC, Firm's EIN 99-1856619, Firm's address 757 THIRD AVENUE 9TH FLOOR NEW YORK, NY 100172013, Phone no. (212) 599-0100

May the IRS discuss this return with the preparer shown above? See Instructions. Yes No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1 Briefly describe the organization's mission:

THE INSTITUTE OF INTERNATIONAL EDUCATION, INC. (THE "INSTITUTE") IS A NOT-FOR-PROFIT ORGANIZATION THAT WAS ORGANIZED AND OPERATES EXCLUSIVELY FOR CHARITABLE AND EDUCATIONAL PURPOSES TO PROMOTE INTERNATIONAL EDUCATIONAL AND CULTURAL EXCHANGES. (SEE SCHEDULE O).ORGANIZATION'S MISSION STATEMENT (CONTINUED):THE INSTITUTE'S PROGRAMS INCLUDE, BUT ARE NOT LIMITED TO, MANAGING FELLOWSHIPS AND SCHOLARSHIPS; ASSISTING THREATENED STUDENTS AND SCHOLARS THROUGH ITS SCHOLAR RESCUE FUND, EMERGENCY STUDENT FUND, AND OTHER EFFORTS; DEVELOPING LEADERS BY BUILDING LEADERSHIP SKILLS AND ENHANCING THE CAPACITY OF INDIVIDUALS AND ORGANIZATIONS TO ADDRESS LOCAL AND GLOBAL CHALLENGES; PROVIDING STRATEGIC RESOURCES AND SERVICES TO HELP FACULTY AND ADMINISTRATORS PROMOTE INTERNATIONAL EXCHANGE; HELPING INSTITUTIONS OF HIGHER EDUCATION BUILD CAPACITY; PROVIDE SERVICES TO ADVANCE SCHOLARSHIP AND BUILD ECONOMIES; AND ENGAGING IN RESEARCH, DIALOGUE AND OTHER ACTIVITIES IN FURTHERANCE OF ITS PURPOSE.

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 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 No

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations 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 \$ 247,826,978 including grants of \$ 199,218,528 ) (Revenue \$ 19,442,082 ) INTERNATIONAL EXCHANGE OF STUDENTS AND SCHOLARS:BY IMPLEMENTING SOME OF THE WORLD'S MOST PRESTIGIOUS AND INNOVATIVE SCHOLARSHIP PROGRAMS, THE INSTITUTE PROVIDES TALENT FROM AROUND THE WORLD WITH ACCESS TO LEADING INSTITUTIONS OF HIGHER EDUCATION AND THE INTERNATIONAL EXPERIENCE THAT IS CRITICAL TO SUCCESS IN THE 21ST CENTURY WORKPLACE. THESE PROGRAMS ARE VITAL TO PROMOTING MUTUAL UNDERSTANDING AND DEVELOPING GLOBAL LEADERS.

4b (Code: ) (Expenses \$ 39,482,579 including grants of \$ 18,089,908 ) (Revenue \$ 10,116,715 ) LEADERSHIP DEVELOPMENT EDUCATIONAL SERVICES:THE INSTITUTE IMPLEMENTS PROGRAMS TO BUILD LEADERSHIP SKILLS AND ENHANCE THE CAPACITY OF INDIVIDUALS AND ORGANIZATIONS TO ADDRESS LOCAL AND GLOBAL CHALLENGES. LONG AND SHORT TERM TRAINING PROGRAMS IMPLEMENTED BY THE INSTITUTE CONNECT STUDENTS AND PROFESSIONALS WITH PEERS AND COLLEAGUES AROUND THE WORLD TO GAIN THE SKILLS AND INTERNATIONAL PERSPECTIVES THEY WILL NEED TO FORGE SOLUTIONS TO GLOBAL CHALLENGES.

4c (Code: ) (Expenses \$ 9,570,543 including grants of \$ 1,154,949 ) (Revenue \$ 598,953 ) HIGHER EDUCATION INSTITUTIONAL DEVELOPMENT:THE INSTITUTE WORKS CLOSELY WITH PUBLIC AND PRIVATE HIGHER EDUCATION INSTITUTIONS TO DEVELOP HIGH-QUALITY ACADEMIC EXCHANGE PROGRAMS IN COORDINATION WITH GOVERNMENT AND NOT-FOR-PROFIT ORGANIZATIONS AND CORPORATIONS. LEVERAGING EXTENSIVE NETWORKS AND EXPERTISE WITHIN THE HIGHER EDUCATION COMMUNITY WORLDWIDE, THE INSTITUTE IS UNIQUELY POSITIONED TO HELP SHAPE NEW UNIVERSITIES AND EXPAND THE CAPABILITIES AND RELATIONSHIPS OF EXISTING ACADEMIC INSTITUTIONS. THE INSTITUTE ALSO HELPS IDENTIFY AND DEVELOP RELATIONSHIPS WITH UNIVERSITIES IN THE US AND OTHER COUNTRIES.

(Code: ) (Expenses \$ 9,568,574 including grants of \$ 6,363,046 ) (Revenue \$ 28,500 ) EMERGENCY STUDENT AND SCHOLAR ASSISTANCE:THE INSTITUTE PROVIDES EMERGENCY, LIFE-SAVING ASSISTANCE TO SCHOLARS AND STUDENTS THROUGHOUT THE WORLD. THROUGH THE SCHOLAR RESCUE FUND, THE INSTITUTE PROVIDES SUPPORT AND SAFE HAVEN TO ACADEMICS IN CRISIS SITUATIONS. THROUGH THE EMERGENCY STUDENT FUND, THE INSTITUTE PROVIDES SUPPORT TO STUDENTS FACING EMERGENCIES AND CRISES SUCH AS ILLNESS OR NATURAL DISASTERS. THE IIE ODYSSEY PROGRAM PROVIDES COMPREHENSIVE SCHOLARSHIPS TO REFUGEES AND DISPLACED STUDENTS AROUND THE WORLD.

(Code: ) (Expenses \$ 1,204,437 including grants of \$ 0 ) (Revenue \$ 1,217,452 ) RESEARCH AND PUBLICATIONS:THE INSTITUTE PRODUCES APPLIED RESEARCH AND ANALYSIS IN THE FIELD OF INTERNATIONAL EDUCATION AND STUDENT MOBILITY. AN EXAMPLE IS "OPEN DOORS," A COMPREHENSIVE INFORMATION RESOURCE PRODUCED WITH SUPPORT FROM THE UNITED STATES DEPARTMENT OF STATE THAT DOCUMENTS AND ANALYZES ACADEMIC MOBILITY BETWEEN THE US AND OTHER COUNTRIES. THE INSTITUTE ALSO PROVIDES RESEARCH AND PROGRAM EVALUATION SERVICES TO DOMESTIC AND INTERNATIONAL GOVERNMENT AGENCIES, NOT-FOR-PROFIT ORGANIZATIONS AND FOUNDATIONS. THE INSTITUTE'S PUBLICATIONS, CONFERENCES AND MEMBERSHIP ORGANIZATION (IIE NETWORK) HELP GUIDE POLICIES AND PROGRAMS IN THE FIELD OF INTERNATIONAL EDUCATION BY PROVIDING GUIDANCE ON INTERNATIONAL STUDY PROGRAMS AND FUNDING.

4d Other program services (Describe in Schedule O.) (Expenses \$ 10,773,011 including grants of \$ 6,363,046 ) (Revenue \$ 1,245,952 )

4e Total program service expenses 307,653,111

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 1 through 21, with sub-questions 11a-e and 12a-b. Each row has a corresponding 'Yes' and 'No' column for the answer.

Part IV Checklist of Required Schedules (continued)

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 22 through 38 regarding tax-exempt bond issues, excess benefit transactions, and related party transactions.

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V [X]

Table with 3 columns: Question ID, Question Text, and Yes/No columns. Rows include questions 1a, 1b, and 1c regarding Form 1096, Forms W-2G, and gaming winnings.

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)

Table with 17 main rows (2a-17) and sub-rows (a-e). Columns include question text, response boxes (e.g., 2a, 2b, 576), and Yes/No/Amount columns. Includes questions about Form W-3, prohibited tax shelter transactions, and Form 8886-T.

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



Section A. Governing Body and Management

Table with 3 columns: Question, Yes, No. Rows include: 1a (30), 1b (29), 2, 3, 4, 5, 6, 7a, 7b, 8a, 8b, 9.

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

Table with 3 columns: Question, Yes, No. Rows include: 10a, 10b, 11a, 11b, 12a, 12b, 12c, 13, 14, 15a, 15b, 16a, 16b.

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed. AL, AK, AR, CA, CO, CT, DC, FL, GA, HI, IL, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, NV, NH, NJ, NM, NY, NC, ND, OH, OK, OR, PA, RI, SC, TN, VA, WA, WV, WI
18 Section 6104 requires an organization to make its Form 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
20 State the name, address, and telephone number of the person who possesses the organization's books and records: AMY EAPPEN SVP AND CFO 1 WORLD TRADE CTR FL 36 NEW YORK, NY 100070090 (212) 883-8200

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

Check if Schedule O contains a response or note to any line in this Part VII

**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.

- 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, if any. See the 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, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or 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.

See the instructions for the order in which to list the persons above.

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee;	Officer	Key employee	Highest compensated employee			
(1) DR ALLAN E GOODMAN CHIEF EXECUTIVE OFFICER/TRUSTEE	40.00 0.00	X		X			802,174	0	52,825
(2) MR HARTLEY R ROGERS VICE CHAIR/TREASURER/TRUSTEE	1.75 0.00	X		X			0	0	0
(3) MR MARK A ANGELSON CHAIR/TRUSTEE	4.50 0.00	X		X			0	0	0
(4) MR CALVIN G BUTLER JR VICE CHAIR/TRUSTEE	1.75 0.00	X		X			0	0	0
(5) MS LINDA VESTER VICE CHAIR/TRUSTEE	1.75 0.00	X		X			0	0	0
(6) MR SETH R BERGSTEIN TRUSTEE	1.50 0.00	X					0	0	0
(7) DR LEE C BOLLINGER TRUSTEE (THRU 01/2024)	1.00 0.00	X					0	0	0
(8) MS AMY BRANDT TRUSTEE	1.50 0.00	X					0	0	0
(9) DR GEORGE CAMPBELL JR TRUSTEE	4.50 0.00	X					0	0	0
(10) MR ROBERT L DILENSCHNEIDER TRUSTEE	2.75 0.00	X					0	0	0
(11) MS COLLEEN GOGGINS TRUSTEE	1.25 0.00	X					0	0	0
(12) MS JOYCE P HENDRICKS TRUSTEE	1.00 0.00	X					0	0	0
(13) MR JONATHAN HOLLOWAY TRUSTEE	1.00 0.00	X					0	0	0
(14) MR MICHAEL E HOUSTON TRUSTEE	1.00 0.00	X					0	0	0
(15) MR SANFORD A IBRAHIM TRUSTEE	1.00 0.00	X					0	0	0
(16) MR THOMAS S JOHNSON TRUSTEE	1.00 0.00	X					0	0	0
(17) DR HENRY KAUFMAN TRUSTEE	1.00 0.00	X					0	0	0

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)					(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee;	Officer	Key employee	Highest compensated employee			
(18) MS LAYA KHADJAVI ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(19) MR MAHBOOB MAHMOOD ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(20) MR ROBERT L MANUEL ..... TRUSTEE (AS OF 09/2024)	1.00 ..... 0.00	X					0	0	0
(21) MR DWIGHT A MCBRIDE ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(22) MS LINDA G MILLS ..... TRUSTEE (AS OF 09/2024)	1.00 ..... 0.00	X					0	0	0
(23) MS STEPHANIE J MUDICK ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(24) MS MELISSA NOBLES ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(25) DR HARRIS PASTIDES ..... TRUSTEE	1.25 ..... 0.00	X					0	0	0
(26) DR JAN SIEGMUND ..... TRUSTEE	1.50 ..... 0.00	X					0	0	0
(27) MS JOANNE E BERGER-SWEENEY ..... TRUSTEE	1.00 ..... 0.00	X					0	0	0
(28) MR MARTIN Y TANG ..... TRUSTEE	1.50 ..... 0.00	X					0	0	0
(29) MS AMY TOWERS ..... TRUSTEE	1.50 ..... 0.00	X					0	0	0
(30) MS SARAH WATERBURY ..... TRUSTEE (THRU 01/2024)	1.00 ..... 0.00	X					0	0	0
(31) MS MARIET WESTERMANN ..... TRUSTEE (AS OF 04/2024)	1.00 ..... 0.00	X					0	0	0
(32) DR MARK S WRIGHTON ..... TRUSTEE	1.50 ..... 0.00	X					0	0	0
(33) MR JASON CZYZ ..... CO-PRESIDENT	40.00 ..... 0.00			X			688,424	0	37,400
(34) MS COURTNEY TEMPLE ..... EVP, CHIEF ADMIN OFFICER	40.00 ..... 0.00			X			451,404	0	33,380
(35) MS AMY EAPPEN ..... SVP, CHIEF FINANCIAL OFFICER	40.00 ..... 0.00			X			345,709	0	52,926
(36) MS KATHERINE CAMPBELL ..... SECRETARY	40.00 ..... 0.00			X			120,422	0	19,174
(37) MS A SARAH HOLLINGER ..... CO-PRESIDENT	40.00 ..... 0.00			X			603,049	0	52,975
(38) MR PETER YOUNG ..... SVP, CHIEF TECHNOLOGY OFFICER	40.00 ..... 0.00					X	396,180	0	33,075
(39) MS EDITH CECIL ..... SVP, PROGRAM MGMT GOV	40.00 ..... 0.00					X	397,128	0	44,700
(40) MR JONAH MURPHY-KOKODYNIAK ..... SVP, PROGRAM DEVELOPMENT	40.00 ..... 0.00					X	361,172	0	48,432
(41) MR JAMES BROWN ..... SR. DIRECTOR, IT INFRASTRUCTURE	40.00 ..... 0.00					X	219,998	0	28,361
(42) MS NINA SMITH ..... SVP, CHIEF PHILANTHROPY OFFICER	40.00 ..... 0.00					X	371,434	0	32,856
<b>1b Sub-Total</b> . . . . .									
<b>c Total from continuation sheets to Part VII, Section A</b> . . . . .									
<b>d Total (add lines 1b and 1c)</b> . . . . .						4,757,094	0	436,104	

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **107**

	Yes	No
<b>3</b> Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> . . . . .		No
<b>4</b> 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? <i>If "Yes," complete Schedule J for such individual</i> . . . . .	Yes	
<b>5</b> Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> . . . . .		No

**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. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
GRANT THORNTON ADVISORS LLC 757 THIRD AVENUE NEW YORK, NY 10017	AUDIT & TAX SERVICES	339,794
BAKER TILLY US LLP 8219 LEESBURG PIKE SUITE 800 TYSONS CORNER, VA 22182	INTERNAL AUDIT	229,949
JURIN CONSULTING SERVICES LLC 2250 2ND STREET SOUTH JACKSONVILLE BEACH, FL 32250	PEOPLESOFT SUPPORT	168,000
KAE STRATEGIC LLC 2101 L STREET NW SUITE 800 WASHINGTON, DC 20037	PROGRAM STRATEGY SERVICES	150,000
ELIZABETH MCENANEY 2288 US ROUTE 9 HUDSON, NY 12534	PROGRAM STRATEGY SERVICES	126,403

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **18**

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

Table with 5 columns: (A) Total revenue, (B) Related or exempt function revenue, (C) Unrelated business revenue, (D) Revenue excluded from tax under sections 512 - 514. Rows include Contributions, Gifts, Grants, and Other Similar Amounts, and Federated campaigns, Membership dues, Fundraising events, etc.

Table for Program Service Revenue with columns for Business Code, (A) Total revenue, (B) Related or exempt function revenue, (C) Unrelated business revenue, and (D) Revenue excluded from tax. Rows include FIXED FEE CONTRACTS, PUBLICATIONS & MEMBERSHIP FEES, EDUCATIONAL FORUM, etc.

Table for Other Revenue with columns for (A) Total revenue, (B) Related or exempt function revenue, (C) Unrelated business revenue, and (D) Revenue excluded from tax. Rows include Investment income, Income from investment of tax-exempt bond proceeds, Royalties, Gross rents, Net rental income, Gross amount from sales of assets other than inventory, Net gain or (loss), Gross income from fundraising events, Net income or (loss) from fundraising events, Gross income from gaming activities, Net income or (loss) from gaming activities, Gross sales of inventory, Net income or (loss) from sales of inventory.

Table for Miscellaneous Revenue with columns for Business Code, (A) Total revenue, (B) Related or exempt function revenue, (C) Unrelated business revenue, and (D) Revenue excluded from tax. Rows include MISCELLANEOUS REVENUE, All other revenue, and Total revenue.

**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).

Check if Schedule O contains a response or note to any line in this Part IX

<b>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</b>	<b>(A)</b> Total expenses	<b>(B)</b> Program service expenses	<b>(C)</b> Management and general expenses	<b>(D)</b> Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	56,568,493	56,568,493		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22	152,305,289	152,305,289		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.	15,952,649	15,952,649		
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	3,284,456	2,187,225	1,030,864	66,367
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	49,500,588	32,964,033	15,536,323	1,000,232
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	4,236,007	2,820,893	1,329,519	85,595
<b>9</b> Other employee benefits	8,192,737	5,455,807	2,571,384	165,546
<b>10</b> Payroll taxes	3,498,224	2,329,580	1,097,957	70,687
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management				
<b>b</b> Legal	417,895	111,077	299,370	7,448
<b>c</b> Accounting	537,858	4,837	533,021	
<b>d</b> Lobbying	319,796		319,796	
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	719,928		719,928	
<b>g</b> Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	26,410,211	22,487,759	3,688,209	234,243
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses	1,832,353	1,112,210	684,127	36,016
<b>14</b> Information technology	4,590,357	1,526,288	3,050,777	13,292
<b>15</b> Royalties				
<b>16</b> Occupancy	6,393,081	5,881,486	260,767	250,828
<b>17</b> Travel	4,271,132	3,419,171	815,866	36,095
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	2,325,111	2,034,592	192,860	97,659
<b>20</b> Interest				
<b>21</b> Payments to affiliates				
<b>22</b> Depreciation, depletion, and amortization	1,969,662	477,635	1,487,343	4,684
<b>23</b> Insurance	561,406	14,087	547,319	
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b> All other expenses				
<b>25</b> <b>Total functional expenses.</b> Add lines 1 through 24e	343,887,233	307,653,111	34,165,430	2,068,692
<b>26</b> <b>Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720).				

**Part X Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part IX

		(A)		(B)
		Beginning of year		End of year
<b>Assets</b>	<b>1</b> Cash-non-interest-bearing . . . . .	16,840,783	<b>1</b>	17,769,545
	<b>2</b> Savings and temporary cash investments	60,300,759	<b>2</b>	57,303,529
	<b>3</b> Pledges and grants receivable, net . . . . .	2,946,886	<b>3</b>	10,828,897
	<b>4</b> Accounts receivable, net . . . . .	52,414,626	<b>4</b>	65,800,624
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		<b>6</b>	
	<b>7</b> Notes and loans receivable, net . . . . .		<b>7</b>	
	<b>8</b> Inventories for sale or use . . . . .		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges . . . . .	6,912,346	<b>9</b>	8,774,679
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	<b>10a</b> 39,563,572		
	<b>b</b> Less: accumulated depreciation	<b>10b</b> 26,282,633	14,030,037	<b>10c</b> 13,280,939
	<b>11</b> Investments—publicly traded securities . . . . .	184,781,222	<b>11</b>	203,610,820
	<b>12</b> Investments—other securities. See Part IV, line 11 . . . . .	27,352,641	<b>12</b>	53,041,300
	<b>13</b> Investments—program-related. See Part IV, line 11 . . . . .		<b>13</b>	
	<b>14</b> Intangible assets . . . . .		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11	59,183,900	<b>15</b>	56,471,822
<b>16 Total assets:</b> Add lines 1 through 15 (must equal line 33) . . . . .	424,763,200	<b>16</b>	486,882,155	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	48,900,615	<b>17</b>	54,473,628
	<b>18</b> Grants payable . . . . .	25,756,244	<b>18</b>	25,702,645
	<b>19</b> Deferred revenue . . . . .	339,317	<b>19</b>	466,211
	<b>20</b> Tax-exempt bond liabilities . . . . .		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties . . . . .		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties . . . . .		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D	65,061,869	<b>25</b>	63,684,728
	<b>26 Total liabilities.</b> Add lines 17 through 25 . . . . .	140,058,045	<b>26</b>	144,327,212
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions . . . . .	196,761,787	<b>27</b>	232,631,907
	<b>28</b> Net assets with donor restrictions	87,943,368	<b>28</b>	109,923,036
	<b>Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds . . . . .		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building or equipment fund . . . . .		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds		<b>31</b>	
	<b>32</b> Total net assets or fund balances	284,705,155	<b>32</b>	342,554,943
	<b>33</b> Total liabilities and net assets/fund balances	424,763,200	<b>33</b>	486,882,155

**Part XI Reconciliation of Net Assets**

Check if Schedule O contains a response or note to any line in this Part XI

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	395,461,727
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	343,887,233
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	51,574,494
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	284,705,155
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	6,275,294
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	0
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (A))	<b>10</b>	342,554,943

**Part XII Financial Statements and Reporting**

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
<b>1</b>	Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b>	Were the organization's financial statements compiled or reviewed by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		No
<b>2b</b>	Were the organization's financial statements audited by an independent accountant? If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	Yes	
<b>2c</b>	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.	Yes	
<b>3a</b>	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F?	Yes	
<b>3b</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	

**Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

**Form 990, Special Condition Description:**

**Special Condition Description**

**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.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**Name of the organization**  
INSTITUTE OF INTERNATIONAL EDUCATION INC

**Employer identification number**  
13-1624046

**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 12, 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 (Form 990).)
- 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:

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- 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 agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:
- 10  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.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12  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 on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
  - a  **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
  - b  **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
  - c  **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
  - d  **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
  - e  Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
  - f Enter the number of supported organizations . . . . . \_\_\_\_\_
  - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			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 or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .	241,622,225	223,299,226	285,465,601	304,485,661	318,467,937	1,373,340,650
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf . . . . .						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge. . . . .						
<b>4 Total.</b> Add lines 1 through 3	241,622,225	223,299,226	285,465,601	304,485,661	318,467,937	1,373,340,650
<b>5</b> 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) . . . . .						34,405,045
<b>6 Public support.</b> Subtract line 5 from line 4.						1,338,935,605

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ▶	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) 2022	(f) Total
<b>7</b> Amounts from line 4. . . . .	241,622,225	223,299,226	285,465,601	304,485,661	318,467,937	1,373,340,650
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . . . . .	2,212,674	3,157,421	4,099,585	6,939,448	7,713,490	24,122,618
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on. . . . .						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). . . . .	31,363	20,138	90,248	24,468	4,674	170,891
<b>11 Total support.</b> Add lines 7 through 10						1,397,634,159
<b>12</b> Gross receipts from related activities, etc. (see instructions) . . . . .					<b>12</b>	159,826,843
<b>13 First 5 years.</b> 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 <b>stop here</b> . . . . . <input type="checkbox"/>						

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

<b>14</b> Public support percentage for 2023 (line 6, column (f) divided by line 11, column (f)) . . . . .	<b>14</b>	95.800 %
<b>15</b> Public support percentage for 2022 Schedule A, Part II, line 14 . . . . .	<b>15</b>	96.000 %
<b>16a 33 1/3% support test—2023.</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 <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input checked="" type="checkbox"/>		
<b>b 33 1/3% support test—2022.</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 <b>stop here.</b> The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>17a 10%-facts-and-circumstances test—2023.</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 <b>stop here.</b> Explain in Part VI 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—2022.</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 <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization . . . . . <input type="checkbox"/>		
<b>18 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 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 1 Gifts, grants, contributions, and membership fees received; 2 Gross receipts from admissions, merchandise sold or services performed; 3 Gross receipts from activities that are not an unrelated trade or business; 4 Tax revenues levied for the organization's benefit; 5 The value of services or facilities furnished by a governmental unit; 6 Total; 7a Amounts included on lines 1, 2, and 3 received from disqualified persons; 7b Amounts included on lines 2 and 3 received from other than disqualified persons; 8 Public support.

Section B. Total Support

Table with 7 columns: (a) 2019, (b) 2020, (c) 2021, (d) 2022, (e) 2023, (f) Total. Rows include: 9 Amounts from line 6; 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources; 10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975; 11 Net income from unrelated business activities not included on line 10b; 12 Other income; 13 Total support; 14 First 5 years.

Section C. Computation of Public Support Percentage

Table with 2 columns: Description, Percentage. Row 15: Public support percentage for 2023 (line 8, column (f) divided by line 13, column (f)). Row 16: Public support percentage from 2022 Schedule A, Part III, line 15.

Section D. Computation of Investment Income Percentage

Table with 2 columns: Description, Percentage. Row 17: Investment income percentage for 2023 (line 10c, column (f) divided by line 13, column (f)). Row 18: Investment income percentage from 2022 Schedule A, Part III, line 17. Row 19a: 33 1/3% support tests-2023. Row 19b: 33 1/3% support tests-2022. Row 20: Private foundation.

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

		Yes	No
<b>1</b>	Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.		
<b>2</b>	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).		
<b>3a</b>	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
<b>b</b>	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.		
<b>c</b>	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.		
<b>4a</b>	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
<b>b</b>	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in <b>Part VI</b> how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.		
<b>c</b>	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.		
<b>5a</b>	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in <b>Part VI</b> , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
<b>b</b>	<b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c</b>	<b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b>	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .		
<b>7</b>	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).		
<b>8</b>	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
<b>9a</b>	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .		
<b>b</b>	Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>c</b>	Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .		
<b>10a</b>	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.		
<b>b</b>	Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).		

**Part IV Supporting Organizations** (continued)

		Yes	No
<b>11</b>	Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b>	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
<b>b</b>	A family member of a person described on 11a above?		
<b>c</b>	A 35% controlled entity of a person described on line 11a or 11b above? <i>If "Yes" to 11a, 11b, or 11c, provide detail in Part VI.</i>		

**Section B. Type I Supporting Organizations**

		Yes	No
<b>1</b>	Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? <i>If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.</i>		
<b>2</b>	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? <i>If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.</i>		

**Section C. Type II Supporting Organizations**

		Yes	No
<b>1</b>	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? <i>If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).</i>		

**Section D. All Type III Supporting Organizations**

		Yes	No
<b>1</b>	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>2</b>	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
<b>3</b>	By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

**Section E. Type III Functionally-Integrated Supporting Organizations**

<b>1</b>	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year ( <b>see instructions</b> ):		
<b>a</b>	<input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.		
<b>b</b>	<input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.		
<b>c</b>	<input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a government entity (see instructions)		
<b>2</b>	Activities Test. <b>Answer lines 2a and 2b below.</b>		
<b>a</b>	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
<b>b</b>	Did the activities described on line 2a, above constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
<b>3</b>	Parent of Supported Organizations. <b>Answer lines 3a and 3b below.</b>		
<b>a</b>	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>If "Yes" or "No", provide details in Part VI.</i>		
<b>b</b>	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? <i>If "Yes," describe in Part VI. the role played by the organization in this regard.</i>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1**  Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in Part VI*). See instructions. All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

**Section A - Adjusted Net Income**

(A) Prior Year

(B) Current Year  
(optional)

- |   |          |  |  |
|---|----------|--|--|
| <b>1</b> Net short-term capital gain  | <b>1</b> |  |  |
| <b>2</b> Recoveries of prior-year distributions   | <b>2</b> |  |  |
| <b>3</b> Other gross income (see instructions)  | <b>3</b> |  |  |
| <b>4</b> Add lines 1 through 3  | <b>4</b> |  |  |
| <b>5</b> Depreciation and depletion   | <b>5</b> |  |  |
| <b>6</b> Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions) | <b>6</b> |  |  |
| <b>7</b> Other expenses (see instructions)  | <b>7</b> |  |  |
| <b>8 Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)  | <b>8</b> |  |  |

**Section B - Minimum Asset Amount**

(A) Prior Year

(B) Current Year  
(optional)

- |  |           |  |  |
|--|-----------|--|--|
| <b>1</b> Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year): | <b>1</b>  |  |  |
| <b>a</b> Average monthly value of securities   | <b>1a</b> |  |  |
| <b>b</b> Average monthly cash balances   | <b>1b</b> |  |  |
| <b>c</b> Fair market value of other non-exempt-use assets  | <b>1c</b> |  |  |
| <b>d Total</b> (add lines 1a, 1b, and 1c)  | <b>1d</b> |  |  |
| <b>e Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):   |           |  |  |
| <b>2</b> Acquisition indebtedness applicable to non-exempt use assets  | <b>2</b>  |  |  |
| <b>3</b> Subtract line 2 from line 1d  | <b>3</b>  |  |  |
| <b>4</b> Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).                                  | <b>4</b>  |  |  |
| <b>5</b> Net value of non-exempt-use assets (subtract line 4 from line 3)  | <b>5</b>  |  |  |
| <b>6</b> Multiply line 5 by 0.035  | <b>6</b>  |  |  |
| <b>7</b> Recoveries of prior-year distributions  | <b>7</b>  |  |  |
| <b>8 Minimum Asset Amount</b> (add line 7 to line 6)   | <b>8</b>  |  |  |

**Section C - Distributable Amount**

Current Year

- |  |          |  |
|--|----------|--|
| <b>1</b> Adjusted net income for prior year (from Section A, line 8, Column A)   | <b>1</b> |  |
| <b>2</b> Enter 85% of line 1   | <b>2</b> |  |
| <b>3</b> Minimum asset amount for prior year (from Section B, line 8, Column A)  | <b>3</b> |  |
| <b>4</b> Enter greater of line 2 or line 3   | <b>4</b> |  |
| <b>5</b> Income tax imposed in prior year  | <b>5</b> |  |
| <b>6 Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions) | <b>6</b> |  |

- 7**  Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

(continued)

Section D - Distributions		Current Year
<b>1</b> Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>	
<b>2</b> Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>	
<b>3</b> Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>	
<b>4</b> Amounts paid to acquire exempt-use assets	<b>4</b>	
<b>5</b> Qualified set-aside amounts (prior IRS approval required - provide details in <b>Part VI</b> )	<b>5</b>	
<b>6</b> Other distributions (describe in <b>Part VI</b> ). See instructions	<b>6</b>	
<b>7 Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>	
<b>8</b> Distributions to attentive supported organizations to which the organization is responsive (provide details in <b>Part VI</b> ). See instructions	<b>8</b>	
<b>9</b> Distributable amount for 2023 from Section C, line 6	<b>9</b>	
<b>10</b> Line 8 amount divided by Line 9 amount	<b>10</b>	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
<b>1</b> Distributable amount for 2023 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2023 (reasonable cause required-- explain in <b>Part VI</b> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2023:			
<b>a</b> From 2018. . . . .			
<b>b</b> From 2019. . . . .			
<b>c</b> From 2020. . . . .			
<b>d</b> From 2021. . . . .			
<b>e</b> From 2022. . . . .			
<b>f Total</b> of lines 3a through e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2023 distributable amount			
<b>i</b> Carryover from 2018 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2023 from Section D, line 7:			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2023 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>6</b> Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, explain in <b>Part VI</b> . See instructions.			
<b>7 Excess distributions carryover to 2024.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2019. . . . .			
<b>b</b> Excess from 2020. . . . .			
<b>c</b> Excess from 2021. . . . .			
<b>d</b> Excess from 2022. . . . .			
<b>e</b> Excess from 2023. . . . .			

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

### Facts And Circumstances Test

Return Reference	Explanation
SCHEDULE A, PART II, LINE 10, EXPLANATION OF OTHER INCOME:	MISCELLANEOUS REVENUE - 2019 AMOUNT: \$ 31,363. 2020 AMOUNT: \$ 20,138. 2021 AMOUNT: \$ 90,248. 2022 AMOUNT: \$ 24,468. 2023 AMOUNT: \$ 4,674.

## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

**Schedule B**

**Schedule of Contributors**

OMB No. 1545-0047

(Form 990)  
Department of the Treasury  
Internal Revenue Service

▶ Attach to Form 990, 990-EZ, or 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

**2023**

Name of the organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC

Employer identification number  
13-1624046

Organization type (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

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

Form 990-PF

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

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization  
 INSTITUTE OF INTERNATIONAL EDUCATION INC

**Employer identification number**  
 13-1624046

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
RESTRICTED		\$ RESTRICTED	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC

**Employer identification number**  
13-1624046

**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization INSTITUTE OF INTERNATIONAL EDUCATION INC	<b>Employer identification number</b> 13-1624046
--	---

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

<b>(a)</b> No. from Part I	<b>(b) Purpose of gift</b>	<b>(c) Use of gift</b>	<b>(d) Description of how gift is held</b>
	_____	_____	_____
	_____	_____	_____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
<b>(a)</b> No. from Part I	<b>(b) Purpose of gift</b>	<b>(c) Use of gift</b>	<b>(d) Description of how gift is held</b>
	_____	_____	_____
	_____	_____	_____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
<b>(a)</b> No. from Part I	<b>(b) Purpose of gift</b>	<b>(c) Use of gift</b>	<b>(d) Description of how gift is held</b>
	_____	_____	_____
	_____	_____	_____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
<b>(a)</b> No. from Part I	<b>(b) Purpose of gift</b>	<b>(c) Use of gift</b>	<b>(d) Description of how gift is held</b>
	_____	_____	_____
	_____	_____	_____
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	

## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

**Political Campaign and Lobbying Activities**  
**For Organizations Exempt From Income Tax Under section 501(c) and section 527**  
  
▶ **Complete if the organization is described below. ▶ Attach to Form 990 or Form 990-EZ.**  
▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**If the organization answered "Yes" on Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then**

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

**If the organization answered "Yes" on Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then**

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

**If the organization answered "Yes" on Form 990, Part IV, Line 5 (Proxy Tax) (see separate instructions) or Form 990-EZ, Part V, line 35c (Proxy Tax) (see separate instructions), then**

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of the organization INSTITUTE OF INTERNATIONAL EDUCATION INC	<b>Employer identification number</b>  13-1624046
--	---

**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

**1** Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."

**2** Political campaign activity expenditures. See instructions ..... ▶ \$ \_\_\_\_\_

**3** Volunteer hours for political campaign activities. See instructions .....

**Part I-B Complete if the organization is exempt under section 501(c)(3).**

**1** Enter the amount of any excise tax incurred by the organization under section 4955 ..... \$ \_\_\_\_\_

**2** Enter the amount of any excise tax incurred by organization managers under section 4955 ..... \$ \_\_\_\_\_

**3** If the organization incurred a section 4955 tax, did it file Form 4720 for this year? .....  Yes  No

**4a** Was a correction made? .....  Yes  No

**b** If "Yes," describe in Part IV.

**Part I-C Complete if the organization is exempt under section 501(c), except section 501(c)(3).**

**1** Enter the amount directly expended by the filing organization for section 527 exempt function activities ..... \$ \_\_\_\_\_

**2** Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ..... ▶ \$ \_\_\_\_\_

**3** Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b..... \$ \_\_\_\_\_

**4** Did the filing organization file **Form 1120-POL** for this year? .....  Yes  No

**5** Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.
<b>1</b>				
<b>2</b>				
<b>3</b>				
<b>4</b>				
<b>5</b>				
<b>6</b>				

**Part II-A Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).**

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)	<b>(a)</b> Filing organization's totals	<b>(b)</b> Affiliated group totals												
<b>1a</b> Total lobbying expenditures to influence public opinion (grass roots lobbying) .....														
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....														
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....														
<b>d</b> Other exempt purpose expenditures .....														
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....														
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.														
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:35%;">If the amount on line 1e, column (a) or (b) is:</th> <th style="width:65%;">The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	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.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:													
Not over \$500,000	20% of the amount on line 1e.													
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.													
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....														
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....														
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....														
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....		<input type="checkbox"/> <b>Yes</b> <input type="checkbox"/> <b>No</b>												

**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 separate instructions for lines 2a through 2f.)

<b>Lobbying Expenditures During 4-Year Averaging Period</b>					
Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) Total
<b>2a</b> Lobbying nontaxable amount					
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					
<b>c</b> Total lobbying expenditures					
<b>d</b> Grassroots nontaxable amount					
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					
<b>f</b> Grassroots lobbying expenditures					

**Part II-B Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).**

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

	(a)		(b)
	Yes	No	Amount
<b>1</b> During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
<b>a</b> Volunteers? .....	Yes		
<b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? .....	Yes		
<b>c</b> Media advertisements? .....		No	
<b>d</b> Mailings to members, legislators, or the public? .....	Yes		
<b>e</b> Publications, or published or broadcast statements? .....		No	
<b>f</b> Grants to other organizations for lobbying purposes? .....		No	
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body? .....	Yes		319,796
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? .....		No	
<b>i</b> Other activities? .....	Yes		
<b>j</b> Total. Add lines 1c through 1i .....			319,796
<b>2a</b> Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? .....		No	
<b>b</b> If "Yes," enter the amount of any tax incurred under section 4912 .....			
<b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912 .....			
<b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? .....			

**Part III-A Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).**

	Yes	No
<b>1</b> Were substantially all (90% or more) dues received nondeductible by members? .....	<b>1</b>	
<b>2</b> Did the organization make only in-house lobbying expenditures of \$2,000 or less? .....	<b>2</b>	
<b>3</b> Did the organization agree to carry over lobbying and political expenditures from the prior year? .....	<b>3</b>	

**Part III-B Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No" OR (b) Part III-A, line 3, is answered "Yes."**

<b>1</b> Dues, assessments and similar amounts from members .....	<b>1</b>
<b>2</b> Section 162(e) nondeductible lobbying and political expenditures ( <b>do not include amounts of political expenses for which the section 527(f) tax was paid</b> ).	
<b>a</b> Current year .....	<b>2a</b>
<b>b</b> Carryover from last year .....	<b>2b</b>
<b>c</b> Total .....	<b>2c</b>
<b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .	<b>3</b>
<b>4</b> If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? .....	<b>4</b>
<b>5</b> Taxable amount of lobbying and political expenditures. See Instructions .....	<b>5</b>

**Part IV Supplemental Information**

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions), and Part II-B, line 1. Also, complete this part for any additional information.

Return Reference	Explanation
PART II-B, LINE 1:	OTHER LOBBYING ACTIVITIES: THE CEO, TRUSTEES, SENIOR STAFF AND ALUMNI VOLUNTEERS OF INSTITUTE OF INTERNATIONAL EDUCATION, AS WELL AS INDEPENDENT CONSULTANTS, MEET WITH LEGISLATIVE AND GOVERNMENT OFFICIALS AND/OR THEIR STAFF TO PROVIDE INFORMATION REGARDING THE MISSION AND PROGRAMS. FROM TIME TO TIME IIE HAS SUPPLEMENTED THESE VISITS WITH CORRESPONDENCE.

**Additional Data**

**Return to Form**

**Software ID:**  
**Software Version:**

Supplemental Financial Statements

2022

Open to Public Inspection

Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury Internal Revenue Service

Name of the organization INSTITUTE OF INTERNATIONAL EDUCATION INC

Employer identification number

13-1624046

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

Table with 3 columns: (a) Donor advised funds, (b) Funds and other accounts, and a description column. Rows include Total number at end of year, Aggregate value of contributions to (during year), Aggregate value of grants from (during year), and Aggregate value at end of year.

- 5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?

Part II Conservation Easements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

- 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 in the form of a conservation easement on the last day of the tax year.

Table with 2 columns: Held at the End of the Year and a description column. Rows include 2a Total number of conservation easements, 2b Total acreage restricted by conservation easements, 2c Number of conservation easements on a certified historic structure included in (a), and 2d Number of conservation easements included in (c) acquired after July 25, 2006.

- 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization 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, inspection, handling of violations, and enforcement of the conservation easements it holds?
6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year
7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year
8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?
9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

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

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

- 1a If the organization elected, as permitted under FASB ASC 958, 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 XIII, the text of the footnote to its financial statements that describes these items.
1b If the organization elected, as permitted under FASB ASC 958, 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:
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 FASB ASC 958 relating to these items:

**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 XIII.
- 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 the organization answered "Yes" on 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 XIII and complete the following table:
- |  | Amount    |
|--|-----------|
| <b>c</b> Beginning balance . . . . .             | <b>1c</b> |
| <b>d</b> Additions during the year . . . . .     | <b>1d</b> |
| <b>e</b> Distributions during the year . . . . . | <b>1e</b> |
| <b>f</b> Ending balance . . . . .                | <b>1f</b> |
- 2a** Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  **Yes**  **No**
- b** If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . .

**Part V Endowment Funds.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
<b>1a</b> Beginning of year balance . . . . .	176,615,104	155,492,403	183,118,679	163,447,909	77,107,494
<b>b</b> Contributions . . . . .	2,641,179	3,132,163	9,239,194	106,017	82,095,285
<b>c</b> Net investment earnings, gains, and losses	39,648,415	22,608,164	-32,235,390	23,274,477	7,495,791
<b>d</b> Grants or scholarships . . . . .					
<b>e</b> Other expenditures for facilities and programs . . . . .	5,503,014	4,617,626	4,630,080	3,709,724	3,250,661
<b>f</b> Administrative expenses . . . . .					
<b>g</b> End of year balance . . . . .	213,401,684	176,615,104	155,492,403	183,118,679	163,447,909

- 2** Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a** Board designated or quasi-endowment ▶ 59.576 %
  - b** Permanent endowment ▶ 3.358 %
  - c** Term endowment ▶ 37.066 %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a** Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |  | Yes | No |
|--|-----|----|
| <b>(i)</b> Unrelated organizations . . . . . |     | No |
| <b>(ii)</b> Related organizations . . . . .  |     | No |
- b** If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? . . . . .
- 4** Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
<b>1a</b> Land . . . . .				
<b>b</b> Buildings . . . . .				
<b>c</b> Leasehold improvements		8,640,935	1,509,384	7,131,551
<b>d</b> Equipment . . . . .		5,199,610	2,149,256	3,050,354
<b>e</b> Other . . . . .		25,723,027	22,623,993	3,099,034
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶				13,280,939

**Part VII Investments - Other Securities.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

Table with 3 columns: (a) Description of security or category, (b) Book value, (c) Method of valuation. Rows include Financial derivatives, Closely-held equity interests, Other (A) EQUITY-ORIENTED, (B) MULTI-STRATEGY, (C) CREDIT-ORIENTED, (D), (E), (F), (G), (H), and Total.

**Part VIII Investments - Program Related.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

Table with 3 columns: (a) Description of investment, (b) Book value, (c) Method of valuation. Rows (1) through (9) and Total.

**Part IX Other Assets.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

Table with 2 columns: (a) Description, (b) Book value. Rows include RIGHT-OF-USE ASSETS, BENEFICIAL INTERESTS IN PERPETUAL TRUSTS HELD BY THIRD PARTIES, (2) through (9), and Total.

**Part X Other Liabilities.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

Table with 2 columns: (a) Description of liability, (b) Book value. Rows include Federal income taxes, OPERATING LEASE LIABILITIES, and Total.

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII

**Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<b>1</b>	Total revenue, gains, and other support per audited financial statements . . . . .		<b>1</b>	401,017,093
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
<b>a</b>	Net unrealized gains (losses) on investments . . . . .	<b>2a</b>	6,275,294	
<b>b</b>	Donated services and use of facilities . . . . .	<b>2b</b>		
<b>c</b>	Recoveries of prior year grants . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .	<b>2e</b>	6,275,294	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .	<b>3</b>	394,741,799	
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>	719,928	
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .	<b>4c</b>	719,928	
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.) . . . . .	<b>5</b>	395,461,727	

**Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

<b>1</b>	Total expenses and losses per audited financial statements . . . . .		<b>1</b>	343,167,305
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
<b>a</b>	Donated services and use of facilities . . . . .	<b>2a</b>		
<b>b</b>	Prior year adjustments . . . . .	<b>2b</b>		
<b>c</b>	Other losses . . . . .	<b>2c</b>		
<b>d</b>	Other (Describe in Part XIII.) . . . . .	<b>2d</b>		
<b>e</b>	Add lines <b>2a</b> through <b>2d</b> . . . . .	<b>2e</b>	0	
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b> . . . . .	<b>3</b>	343,167,305	
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b . . . . .	<b>4a</b>	719,928	
<b>b</b>	Other (Describe in Part XIII.) . . . . .	<b>4b</b>		
<b>c</b>	Add lines <b>4a</b> and <b>4b</b> . . . . .	<b>4c</b>	719,928	
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.) . . . . .	<b>5</b>	343,887,233	

**Part XIII Supplemental Information**

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, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
PART V, LINE 4:	THE INSTITUTE INTENDS TO USE ITS ENDOWMENT, WHICH CONSISTS OF INDIVIDUAL FUNDS THAT HAVE BEEN ESTABLISHED FOR A VARIETY OF PURPOSES INCLUDING SCHOLAR SUPPORT AND SCHOLARSHIPS, CONSISTENT WITH THE PURPOSES FOR WHICH THE FUNDS HAVE BEEN ESTABLISHED.
PART X, LINE 2:	INCOME TAXES: THE INSTITUTE IS A NOT-FOR-PROFIT ORGANIZATION EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE U.S. INTERNAL REVENUE CODE. THE INSTITUTE IS NOT GENERALLY REQUIRED TO PAY CORPORATE INCOME TAX IN MOST JURISDICTIONS IN WHICH IT OPERATES BY VIRTUE OF, INTER ALIA, IIE'S NOT-FOR-PROFIT STATUS AND/OR THE STATUS OF ITS LOCAL AFFILIATE OR REPRESENTATIVE OFFICES. HOWEVER, IIE PAYS PAYROLL, SALES AND USE TAXES IN THE NORMAL COURSE OF BUSINESS WHERE REQUIRED, AND SOME ACTIVITIES MAY BE SUBJECT TO SALES AND VALUE ADDED TAXES IN CERTAIN JURISDICTIONS. ACCORDINGLY, IIE PAYS OR MAINTAINS APPROPRIATE PROVISIONS TO ACCOUNT FOR SUCH LIABILITIES.

## **Additional Data**

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**Software ID:**

**Software Version:**

**Statement of Activities Outside the United States**

▶ **Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.**

▶ **Attach to Form 990.**

▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

Name of the organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC

**Employer identification number**  
13-1624046

**Part I General Information on Activities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

- 1 For grantmakers.** Does the organization maintain records to substantiate the amount of its grants or other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**
- 2 For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.
- 3** Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

(a) Region	(b) Number of offices in the region	(c) Number of employees, agents, and independent contractors in the region	(d) Activities conducted in region (by type) (such as fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in the region	(f) Total expenditures for and investments in the region
(1) CENTRAL AMERICA AND THE CARIBBEAN	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	396,576
(2) EAST ASIA AND THE PACIFIC	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	3,302,367
(3) EAST ASIA AND THE PACIFIC	0	0	GRANTMAKING		145,121
(4) EAST ASIA AND THE PACIFIC	4	45	MAINTAINING OFFICES		4,213,292
(5) EUROPE (INCLUDING ICELAND & GREENLAND)	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	4,224,585
(6) EUROPE (INCLUDING ICELAND & GREENLAND)	0	0	GRANTMAKING		259,900
(7) MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	1,357,518
(8) MIDDLE EAST AND NORTH AFRICA	0	0	GRANTMAKING		42,949
(9) MIDDLE EAST AND NORTH AFRICA	1	8	MAINTAINING OFFICES		429,654
(10) NORTH AMERICA	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	926,524
(11) NORTH AMERICA	0	0	GRANTMAKING		98,000
(12) NORTH AMERICA	1	19	MAINTAINING OFFICES		4,060,340
(13) RUSSIA AND NEIGHBORING STATES	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	653,852
(14) RUSSIA AND NEIGHBORING STATES	0	0	GRANTMAKING		372,936
(15) RUSSIA AND NEIGHBORING STATES	3	15	MAINTAINING OFFICES		1,811,312
(16) SOUTH AMERICA	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	1,385,401
(17) SOUTH ASIA	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	1,264,467
(18) SOUTH ASIA	1	6	MAINTAINING OFFICES		924,507
(19) SUB-SAHARAN AFRICA	0	0	PROGRAM SERVICES	EDUCATION GRANTS-INDIV	1,503,196
(20) SUB-SAHARAN AFRICA	1	16	MAINTAINING OFFICES		777,376
(21) SOUTH AMERICA	0	0	GRANTMAKING		10,500
(22) SOUTH ASIA	0	0	GRANTMAKING		8,757
(23) CENTRAL AMERICA AND THE CARIBBEAN	0	0	INVESTMENTS		28,527,678
<b>3a</b> Sub-total . . . . .	<b>4</b>	<b>45</b>			<b>13,942,308</b>
<b>b</b> Total from continuation sheets to Part I . . . . .	<b>7</b>	<b>64</b>			<b>42,754,500</b>
<b>c Totals</b> (add lines 3a and 3b)	<b>11</b>	<b>109</b>			<b>56,696,808</b>

**Part II Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of noncash assistance	(h) Description of noncash assistance	(i) Method of valuation (book, FMV, appraisal, other)
(1)		EAST ASIA AND THE PACIFIC	EDUCATION EXCHANGE	12,500	WIRE TRANSFER	0		
(2)		EAST ASIA AND THE PACIFIC	EDUCATION EXCHANGE	16,193	WIRE TRANSFER	0		
(3)		EAST ASIA AND THE PACIFIC	EDUCATION EXCHANGE	91,428	WIRE TRANSFER	0		
(4)		EAST ASIA AND THE PACIFIC	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(5)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(6)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(7)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(8)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	34,900	WIRE TRANSFER	0		
(9)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(10)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(11)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	50,000	WIRE TRANSFER	0		
(12)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(13)		EUROPE (INCLUDING ICELAND & GREENLAND)	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(14)		MIDDLE EAST AND NORTH AFRICA	EDUCATION EXCHANGE	16,000	WIRE TRANSFER	0		
(15)		MIDDLE EAST AND NORTH AFRICA	EDUCATION EXCHANGE	18,949	WIRE TRANSFER	0		
(16)		MIDDLE EAST AND NORTH AFRICA	EDUCATION EXCHANGE	8,000	WIRE TRANSFER	0		
(17)		NORTH AMERICA	EDUCATION EXCHANGE	48,000	WIRE TRANSFER	0		
(18)		NORTH AMERICA	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(19)		NORTH AMERICA	EDUCATION EXCHANGE	25,000	WIRE TRANSFER	0		
(20)		RUSSIA AND NEIGHBORING STATES	EDUCATION EXCHANGE	217,936	WIRE TRANSFER	0		
(21)		RUSSIA AND NEIGHBORING STATES	EDUCATION EXCHANGE	155,000	WIRE TRANSFER	0		
(22)		SOUTH AMERICA	EDUCATION EXCHANGE	10,500	WIRE TRANSFER	0		
(23)		SOUTH ASIA	EDUCATION EXCHANGE	8,757	WIRE TRANSFER	0		

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter 23

3 Enter total number of other organizations or entities 0

**Part III Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16.  
Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of noncash assistance	(g) Description of noncash assistance	(h) Method of valuation (book, FMV, appraisal, other)
(1) HEALTH INSURANCE	CENTRAL AMERICA AND THE CARIBBEAN	15	13,815	WIRE TRANSFER			
(2) STIPENDS & GRANTS	CENTRAL AMERICA AND THE CARIBBEAN	35	280,363	WIRE TRANSFER			
(3) TRAVEL	CENTRAL AMERICA AND THE CARIBBEAN	22	26,591	WIRE TRANSFER			
(4) TUITION, BOOKS AND FEES	CENTRAL AMERICA AND THE CARIBBEAN	13	73,256	WIRE TRANSFER			
(5) HEALTH INSURANCE	EAST ASIA AND THE PACIFIC	89	54,999	WIRE TRANSFER			
(6) OTHER EXPENSES	EAST ASIA AND THE PACIFIC	96	99,120	WIRE TRANSFER			
(7) STIPENDS & GRANTS	EAST ASIA AND THE PACIFIC	265	1,957,028	WIRE TRANSFER			
(8) TRAVEL	EAST ASIA AND THE PACIFIC	147	138,296	WIRE TRANSFER			
(9) TUITION, BOOKS AND FEES	EAST ASIA AND THE PACIFIC	289	1,052,926	WIRE TRANSFER			
(10) HEALTH INSURANCE	EUROPE (INCLUDING ICELAND & GREENLAND)	49	33,760	WIRE TRANSFER			
(11) OTHER EXPENSES	EUROPE (INCLUDING ICELAND & GREENLAND)	44	56,390	WIRE TRANSFER			
(12) STIPENDS & GRANTS	EUROPE (INCLUDING ICELAND & GREENLAND)	236	2,241,570	WIRE TRANSFER			
(13) TRAVEL	EUROPE (INCLUDING ICELAND & GREENLAND)	104	92,489	WIRE TRANSFER			
(14) TUITION, BOOKS AND FEES	EUROPE (INCLUDING ICELAND & GREENLAND)	179	1,800,376	WIRE TRANSFER			
(15) HEALTH INSURANCE	MIDDLE EAST AND NORTH AFRICA	21	16,866	WIRE TRANSFER			
(16) OTHER EXPENSES	MIDDLE EAST AND NORTH AFRICA	25	5,800	WIRE TRANSFER			
(17) STIPENDS & GRANTS	MIDDLE EAST AND NORTH AFRICA	116	953,718	WIRE TRANSFER			
(18) TRAVEL	MIDDLE EAST AND NORTH AFRICA	62	77,720	WIRE TRANSFER			
(19) TUITION, BOOKS AND FEES	MIDDLE EAST AND NORTH AFRICA	31	303,415	WIRE TRANSFER			
(20) STIPENDS & GRANTS	NORTH AMERICA	80	572,006	WIRE TRANSFER			
(21) TRAVEL	NORTH AMERICA	40	49,360	WIRE TRANSFER			
(22) TUITION, BOOKS AND FEES	NORTH AMERICA	32	297,218	WIRE TRANSFER			
(23) OTHER EXPENSES	RUSSIA AND NEIGHBORING STATES	8	6,401	WIRE TRANSFER			
(24) STIPENDS & GRANTS	RUSSIA AND NEIGHBORING STATES	44	525,463	WIRE TRANSFER			
(25) TRAVEL	RUSSIA AND NEIGHBORING STATES	23	44,473	WIRE TRANSFER			
(26) TUITION, BOOKS AND FEES	RUSSIA AND NEIGHBORING STATES	10	75,311	WIRE TRANSFER			
(27) STIPENDS & GRANTS	SOUTH AMERICA	133	1,253,156	WIRE TRANSFER			
(28) TRAVEL	SOUTH AMERICA	57	70,929	WIRE TRANSFER			
(29) TUITION, BOOKS AND FEES	SOUTH AMERICA	23	53,500	WIRE TRANSFER			
(30) HEALTH INSURANCE	SOUTH ASIA	11	16,155	WIRE TRANSFER			
(31) OTHER EXPENSES	SOUTH ASIA	44	16,369	WIRE TRANSFER			
(32) STIPENDS & GRANTS	SOUTH ASIA	118	570,584	WIRE TRANSFER			
(33) TRAVEL	SOUTH ASIA	60	36,031	WIRE TRANSFER			
(34) TUITION, BOOKS AND FEES	SOUTH ASIA	127	625,328	WIRE TRANSFER			
(35) HEALTH INSURANCE	SUB-SAHARAN AFRICA	54	17,081	WIRE TRANSFER			
(36) OTHER EXPENSES	SUB-SAHARAN AFRICA	16	11,864	WIRE TRANSFER			
(37) STIPENDS & GRANTS	SUB-SAHARAN AFRICA	214	1,043,750	WIRE TRANSFER			
(38) TRAVEL	SUB-SAHARAN AFRICA	132	241,345	WIRE TRANSFER			
(39) TUITION, BOOKS AND FEES	SUB-SAHARAN AFRICA	48	189,156	WIRE TRANSFER			

**Part IV Foreign Forms**

- 1 Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)* . . . . .  Yes  No
- 2 Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)* . . . . .  Yes  No
- 3 Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with Respect to Certain Foreign Corporations. (see Instructions for Form 5471)* . . . . .  Yes  No
- 4 Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see Instructions for Form 8621)* .  Yes  No
- 5 Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with Respect to Certain Foreign Partnerships (see Instructions for Form 8865)* . . . . .  Yes  No
- 6 Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see Instructions for Form 5713; don't file with Form 990).* . . . . .  Yes  No

**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

ReturnReference	Explanation
PART I, LINE 2:	<p>PROCEDURES FOR MONITORING GRANTS OUTSIDE THE UNITED STATES: OVERALL: ALL OPERATIONS ARE CLOSELY MANAGED BY THE PROGRAM MANAGERS AND VARIOUS DEPARTMENTS WITHIN FINANCE AND ADMINISTRATION (I.E., CFO, GRANTS AND CONTRACTS, LEGAL SERVICES AND ADMINISTRATIVE SERVICES). THERE IS REGULAR MONTHLY MONITORING BY FINANCIAL MANAGERS AND FISCAL YEAR PLANNING AND MID-YEAR BUDGET REVIEWS ARE PERFORMED BY SENIOR MANAGEMENT TO REVIEW THE ACTIVITIES OF ALL PROGRAMS AND ADJUST TO CHANGES IN BUDGET ASSUMPTIONS. REPORTS ARE SUBMITTED TO THE SPONSOR PER CONTRACT OR GRANT REQUIREMENTS. THE INTERNAL AUDIT STAFF MAKES OCCASIONAL VISITS TO OUR INTERNATIONAL OFFICES TO AUDIT PROGRAM CONTROLS AND COMPLIANCE. BUDGETS: BUDGETS ARE ESTABLISHED ON A DEPARTMENT AND PROGRAM BASIS WITH CLOSE COORDINATION BETWEEN PROGRAM FINANCE, PRICING, PROGRAMS, AND FINANCIAL PLANNING &amp; ANALYSIS. BUDGET TO ACTUAL REPORTS ARE REVIEWED REGULARLY BY PROGRAM FINANCE AND PROGRAM TEAM MEMBERS TO MONITOR PERFORMANCE. IN ADDITION, SENIOR MANAGEMENT REVIEWS ARE HELD QUARTERLY. THE BUDGET AND FINANCE COMMITTEE OF THE BOARD OF TRUSTEES REVIEWS THE ANNUAL OPERATING AND CAPITAL BUDGETS, REVIEWS IMPLEMENTATION OF OPERATING PLANS AND CAPITAL PROJECTS, OVERSEES BUDGETING AND INTERNAL FINANCIAL REPORTING SYSTEMS AND PROCEDURES, AND REGULARLY MEETS WITH STAFF TO REVIEW THE FINANCIAL RESULTS AND OTHER FINANCIAL MANAGEMENT REPORTS AND PROVIDE STAFF WITH GUIDANCE AS NECESSARY. PAYMENTS/CASH RECEIPTS: PAYMENTS FOR DISBURSEMENTS AND REIMBURSEMENTS RELATING TO ALL GRANT FUNDS REQUIRE APPROPRIATE SUPPORTING DOCUMENTATION. BEFORE PAYMENTS ARE MADE, GRANTEEES AND VENDORS ARE CHECKED AGAINST SPECIALLY DESIGNATED NATIONAL LISTS AND OTHER SIMILAR PROHIBITED TRANSACTION LISTS TO HELP CONFIRM THAT PAYMENTS ARE NOT PROHIBITED. UPON APPROVAL, PAYMENTS WILL INCLUDE AGREEMENTS STATING THE TERMS OF THE GRANT SIGNED BY IIE AND THE GRANTEE OR VENDOR AND IIE SUPERVISOR/MANAGER LEVEL APPROVED PAYMENT DOCUMENTS TO PROCESS EACH OF THE DISBURSEMENTS OR REIMBURSEMENTS. ALL COSTS ASSOCIATED WITH THESE PAYMENTS ARE CONTROLLED BY PROGRAM MANAGEMENT AS WELL AS THE FINANCE TEAM WHO CONFIRM THAT THE PAYMENTS ARE RELATED TO ALLOWABLE AND SPONSOR-APPROVED ACTIVITIES.</p>
PART I, LINE 3:	<p>METHOD USED ON FINANCIAL STATEMENTS: THE METHOD USED TO ACCOUNT FOR FOREIGN EXPENDITURES AND CASH GRANTS ON THE ORGANIZATION'S FINANCIAL STATEMENTS IS ACCRUAL-BASED AND FOLLOWS US GAAP.</p>
PART IV:	<p>THE INSTITUTE OF INTERNATIONAL EDUCATION INVESTS IN DOMESTIC AND FOREIGN LIMITED PARTNERSHIPS THAT MAY OWN AN INTEREST IN A FOREIGN CORPORATION, PASSIVE FOREIGN INVESTMENT COMPANY, OR FOREIGN PARTNERSHIP. NEVERTHELESS, IIE'S INVESTMENT ACTIVITIES MAY NOT REACH THE THRESHOLDS REQUIRED FOR FILING THE FORMS 926, 5471, 8621 OR 8865. TO THE EXTENT SUCH A FORM WAS COMPLETED, IT HAS BEEN FILED WITH THE ORGANIZATION'S FORM 990-T.</p>

## Additional Data

**Software ID:**

**Software Version:**

Schedule I (Form 990) Grants and Other Assistance to Organizations, Governments and Individuals in the United States

Department of the Treasury Internal Revenue Service Name of the organization INSTITUTE OF INTERNATIONAL EDUCATION INC

Employer identification number 13-1624046

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 Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

Table with 8 columns: (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. Rows include organizations like ALICE INTERNATIONAL, AMERICAN COUNCILS FOR INT ED, AMERICAN UNIVERSITY, ARIZONA STATE UNIVERSITY, BALL STATE UNIVERSITY, BARD COLLEGE, BOSTON UNIVERSITY, BRIGHAM YOUNG UNIVERSITY, BROWN UNIVERSITY, BRYN MAWR COLLEGE, CALIFORNIA STATE UNIVERSITY LONG BEACH, CALVIN UNIVERSITY, COLLEGE OF WILLIAM AND MARY, COMMONWEALTH UNIVERSITY OF PENNSYLVANIA, CONCORDIA COLLEGE, CORNELL UNIVERSITY, COUNCIL OF AMERICAN OVERSEAS RESEARCH, DENVER BOTANIC GARDENS INC, EMBRY-RIDDLE AERONAUTICAL UNIV, EMORY UNIVERSITY, FULBRIGHT ASSOCIATION INC, GEORGE MASON UNIVERSITY, GEORGE WASHINGTON UNIVERSITY, GEORGIA TECH RESEARCH CORPORATION, INDIANA UNIVERSITY, INDIANA UNIVERSITY OF PENNSYLVANIA, INTERNATIONAL HOUSE DAVIS, JAMES MADISON UNIVERSITY, LEWIS UNIVERSITY, LONE STAR COLLEGE SYSTEM, MARQUETTE UNIVERSITY, MASSACHUSETTS INSTITUTE OF TECHNOLOGY, MICHIGAN STATE UNIVERSITY, NORTH CAROLINA STATE UNIVERSITY, ONE TO WORLD INC, PENNSYLVANIA STATE UNIVERSITY, PORTLAND STATE UNIVERSITY, PRESIDENT AND FELLOWS OF MIDDLEBURY COLLEGE, RESEARCH FOUNDATION CUNY, RUTGERS THE STATE UNIV OF NJ, SALEM STATE UNIVERSITY, SAN DIEGO STATE UNIVERSITY, SAN FRANCISCO STATE UNIVERSITY, STANFORD UNIVERSITY, SYRACUSE UNIVERSITY, TEXAS A AND M UNIVERSITY, THE CITADEL, U OF KS CENTER FOR RESEARCH INC, UNIVERSITY OF ARIZONA, UNIVERSITY OF CALIFORNIA DAVIS, UNIVERSITY OF CALIFORNIA LOS ANGELES, UNIVERSITY OF FLORIDA, UNIVERSITY OF GEORGIA, UNIVERSITY OF GEORGIA RESEARCH FOUNDATION, UNIVERSITY OF HAWAII, UNIVERSITY OF MARYLAND, UNIVERSITY OF MINNESOTA, UNIVERSITY OF MISSISSIPPI, UNIVERSITY OF MISSOURI, UNIVERSITY OF MONTANA, UNIVERSITY OF NORTH CAROLINA, UNIVERSITY OF NORTH GEORGIA, UNIVERSITY OF NOTRE DAME, UNIVERSITY OF OREGON, UNIVERSITY OF PITTSBURGH, UNIVERSITY OF RHODE ISLAND, UNIVERSITY OF TEXAS AT AUSTIN, UNIVERSITY OF UTAH, UNIVERSITY OF WASHINGTON, UNIVERSITY OF WISCONSIN, UNIVERSITY OF WYOMING, VA POLYTECHNIC INS AND STATE UNIV, VANDERBILT UNIVERSITY, VIRGINIA COMMONWEALTH UNIVERSITY, VIRGINIA MILITARY INSTITUTE, WESTERN KY UNIV, WOODROW WILSON INTL CTR FOR SCHOLAR, WORLDBOSTON.

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 77

3 Enter total number of other organizations listed in the line 1 table

**Part III Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22.

Part III can be duplicated if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) HEALTH INSURANCE	2264	3,546,521			
(2) OTHER EDUCATIONAL EXPENSES	2333	2,958,162			
(3) STIPENDS & GRANTS	14287	106,865,945			
(4) TRAVEL	6434	6,198,468			
(5) TUITION, BOOKS AND FEES	5361	32,736,193			
(5)					
(6)					
(7)					

**Part IV Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
PART I, LINE 2:	<p>PROCEDURES FOR MONITORING GRANTS IN THE UNITED STATES: OVERALL: OPERATIONS ARE CLOSELY MANAGED BY THE PROGRAM MANAGERS AND VARIOUS DEPARTMENTS WITHIN FINANCE AND ADMINISTRATION (I.E., CFO, GRANTS AND CONTRACTS, LEGAL SERVICES AND ADMINISTRATIVE SERVICES). THERE IS REGULAR MONTHLY MONITORING BY PROGRAM FINANCE AND QUARTERLY FINANCIAL MANAGEMENT REVIEWS BY SENIOR MANAGEMENT. FISCAL YEAR PLANNING AND MIDYEAR BUDGET REVIEWS ARE PERFORMED BY SENIOR MANAGEMENT TO REVIEW THE ACTIVITIES OF ALL PROGRAMS AND DEPARTMENTS AND ADJUST TO CHANGES IN BUDGET ASSUMPTIONS. REPORTS ARE SUBMITTED TO THE SPONSOR PER CONTRACT OR GRANT REQUIREMENTS. BUDGETS: BUDGETS ARE ESTABLISHED ON A DEPARTMENT AND PROGRAM BASIS WITH CLOSE COORDINATION BETWEEN PROGRAM FINANCE, PRICING, PROGRAMS, AND FINANCIAL PLANNING &amp; ANALYSIS. BUDGET TO ACTUAL REPORTS ARE REVIEWED REGULARLY BY PROGRAM FINANCE AND PROGRAM TEAM MEMBERS TO MONITOR PERFORMANCE. IN ADDITION, SENIOR MANAGEMENT REVIEWS ARE HELD QUARTERLY. THE BUDGET AND FINANCE COMMITTEE OF THE BOARD OF TRUSTEES REVIEWS THE ANNUAL OPERATING AND CAPITAL BUDGETS, REVIEWS IMPLEMENTATION OF OPERATING PLANS AND CAPITAL PROJECTS, OVERSEES BUDGETING AND INTERNAL FINANCIAL REPORTING SYSTEMS AND PROCEDURES, AND REGULARLY MEETS WITH STAFF TO REVIEW THE FINANCIAL RESULTS AND OTHER FINANCIAL MANAGEMENT REPORTS AND PROVIDE STAFF WITH GUIDANCE AS NECESSARY. PAYMENTS/CASH RECEIPTS: FOR REIMBURSEMENTS AND DISBURSEMENTS RELATING TO GRANTS APPROPRIATE SUPPORTING DOCUMENTATION IS REQUIRED. ALL ACTIVITIES AND COSTS ARE PERFORMED UNDER THE AUSPICES OF AND ARE CONTROLLED BY THE PROGRAM AND/OR ADMINISTRATION DIRECTORS (CFO, GRANTS AND CONTRACTS, LEGAL COUNSEL, ADMINISTRATIVE SERVICES) WHO ENSURE THAT THE TASKS PERFORMED ARE RELATED TO ALLOWABLE AND SPONSOR-APPROVED ACTIVITIES. COSTS ARE REVIEWED AND APPROVED BY PROGRAM DIRECTORS, WITH ADDITIONAL OVERSIGHT BY THE FINANCE DEPARTMENT. SEVIS: IIE ALSO UTILIZES THE STUDENT AND EXCHANGE VISITOR PROGRAM (SEVP) WHICH SERVES AS THE BRIDGE FOR VARIOUS GOVERNMENT ORGANIZATIONS THAT HAVE AN INTEREST IN INFORMATION ON FOREIGN STUDENTS. SEVP USES WEB-BASED TECHNOLOGY, THE STUDENT AND EXCHANGE VISITOR INFORMATION SYSTEM (SEVIS), TO TRACK AND MONITOR SCHOOLS AND PROGRAMS, STUDENTS, EXCHANGE VISITORS AND THEIR DEPENDENTS THROUGHOUT THE DURATION OF APPROVED PARTICIPATION WITHIN THE U.S. EDUCATION SYSTEM.</p>

**Additional Data**

**Return to Form**

**Software ID:**  
**Software Version:**

**Schedule J**  
**(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

- ▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
- ▶ **Attach to Form 990.**
- ▶ **Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

**2023**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

Name of the organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC

Employer identification number

13-1624046

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- |   |  |
|---|--|
| <input type="checkbox"/> First-class or charter travel            | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input type="checkbox"/> Travel for companions                    | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax idemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees   |
| <input type="checkbox"/> Discretionary spending account           | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

**b** If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?

**3** Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee              | <input type="checkbox"/> Written employment contract                                |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations     | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
  - b** Participate in, or receive payment from, a supplemental nonqualified retirement plan?
  - c** Participate in, or receive payment from, an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
  - b** Any related organization?
- If "Yes," on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
  - b** Any related organization?
- If "Yes," on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III.

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

	Yes	No
<b>1a</b>		
<b>1b</b>		
<b>2</b>		
<b>4a</b>		No
<b>4b</b>		No
<b>4c</b>		No
<b>5a</b>		No
<b>5b</b>		No
<b>6a</b>		No
<b>6b</b>		No
<b>7</b>	Yes	
<b>8</b>		No
<b>9</b>		

**Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(B) Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
<b>1</b> DR ALLAN E GOODMAN CHIEF EXECUTIVE OFFICER/TRUSTEE	(i)	598,175	130,500	73,499	39,600	13,225	854,999	0
	(ii)	0	0	0	0	0	0	0
<b>2</b> MR JASON CZYZ CO-PRESIDENT	(i)	480,600	182,000	25,824	37,400	0	725,824	0
	(ii)	0	0	0	0	0	0	0
<b>3</b> MS A SARAH HOLLINGER CO-PRESIDENT	(i)	470,325	107,000	25,724	39,600	13,375	656,024	0
	(ii)	0	0	0	0	0	0	0
<b>4</b> MS COURTNEY TEMPLE EVP, CHIEF ADMIN OFFICER	(i)	327,200	122,600	1,604	32,780	600	484,784	0
	(ii)	0	0	0	0	0	0	0
<b>5</b> MS EDITH CECIL SVP, PROGRAM MGMT GOV	(i)	291,400	70,100	35,628	36,600	8,100	441,828	0
	(ii)	0	0	0	0	0	0	0
<b>6</b> MR PETER YOUNG SVP, CHIEF TECHNOLOGY OFFICER	(i)	294,535	75,000	26,645	22,875	10,200	429,255	0
	(ii)	0	0	0	0	0	0	0
<b>7</b> MR JONAH MURPHY-KOKODYNIAK SVP, PROGRAM DEVELOPMENT	(i)	270,265	67,400	23,507	36,557	11,875	409,604	0
	(ii)	0	0	0	0	0	0	0
<b>8</b> MS NINA SMITH SVP, CHIEF PHILANTHROPY OFFICER	(i)	280,044	67,900	23,490	23,400	9,456	404,290	0
	(ii)	0	0	0	0	0	0	0
<b>9</b> MS AMY EAPPEN SVP, CHIEF FINANCIAL OFFICER	(i)	256,717	65,200	23,792	35,316	17,610	398,635	0
	(ii)	0	0	0	0	0	0	0
<b>10</b> MR JAMES BROWN SR. DIRECTOR, IT INFRASTRUCTURE	(i)	213,942	5,000	1,056	25,961	2,400	248,359	0
	(ii)	0	0	0	0	0	0	0

**Part III Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information.

Return Reference	Explanation
PART I, LINE 7	EXECUTIVE BONUSES ARE DETERMINED BASED ON A COMBINATION OF ORGANIZATIONAL AND INDIVIDUAL PERFORMANCE. ORGANIZATIONAL PERFORMANCE RATING IS RECOMMENDED BY THE EXECUTIVE TEAM AS A WHOLE AND APPROVED BY THE COMPENSATION HUMAN RESOURCES COMMITTEE. INDIVIDUAL PERFORMANCE RATING IS RECOMMENDED BY THE INDIVIDUAL EXECUTIVE'S MANAGER.

## **Additional Data**

[Return to Form](#)

**Software ID:**

**Software Version:**

**SCHEDULE O**  
**(Form 990)**Department of the Treasury  
Internal Revenue Service**Supplemental Information to Form 990 or 990-EZ****Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.****Attach to Form 990 or 990-EZ.****Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2023****Open to Public  
Inspection**Name of the organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC**Employer identification number**

13-1624046

<b>Return Reference</b>	<b>Explanation</b>
FORM 990, PART VI, SECTION B, LINE 11B	THE ORGANIZATION'S AUDIT COMMITTEE REVIEWS THE FINAL FORM 990 AND MAKES SUGGESTIONS. THE FINAL FORM 990 IS THEN DISTRIBUTED TO THE FULL BOARD OF TRUSTEES BEFORE FILING.
FORM 990, PART VI, SECTION B, LINE 12C	THE CONFLICT OF INTEREST POLICY IS DISTRIBUTED TO ALL OFFICERS, TRUSTEES AND EMPLOYEES. UPDATED ANNUAL DISCLOSURES ARE REQUIRED FROM EACH RECIPIENT. THIS PROCESS IS MONITORED BY HUMAN RESOURCES (FOR EMPLOYEES) AND THE LEGAL DEPT./SECRETARY OF THE BOARD (FOR TRUSTEES AND OFFICERS).
FORM 990, PART VI, SECTION B, LINE 15	THE COMPENSATION AND HUMAN RESOURCES COMMITTEE OF THE BOARD ANNUALLY REVIEWS THE COMPENSATION FOR THE INSTITUTE'S SENIOR EXECUTIVES. THE COMMITTEE BASES ITS REVIEW, IN PART, ON COMPARABLE DATA OBTAINED FROM AN OUTSIDE, INDEPENDENT CONSULTANT, WHICH IS UPDATED FROM TIME TO TIME. THE COMMITTEE REVIEWS AND APPROVES THE ANNUAL SALARY, INCENTIVE COMPENSATION, AND ANY OTHER BENEFITS ("EXECUTIVE COMPENSATION") OF THE SENIOR EXECUTIVES, AND SO ADVISES THE EXECUTIVE COMMITTEE OF THE BOARD. THE COMMITTEE REVIEWS AND RECOMMENDS TO THE EXECUTIVE COMMITTEE FOR ITS APPROVAL THE EXECUTIVE COMPENSATION OF THE CEO/PRESIDENT, AS APPLICABLE. THE EXECUTIVE COMMITTEE THEN ADVISES THE BOARD OF ITS DETERMINATION. THE COMPENSATION DATA REPORTED IN THIS FORM 990 IS FOR THE PERIOD JANUARY 2023 THROUGH DECEMBER 2023.
FORM 990, PART VI, SECTION C, LINE 19	THE FINANCIAL STATEMENTS ARE PUBLICLY AVAILABLE. GOVERNING DOCUMENTS AND THE CONFLICT OF INTEREST POLICY ARE AVAILABLE UPON REQUEST.
FORM 990, PART VII - AVERAGE HOURS:	THE AVERAGE HOURS PER WEEK ARE BASED UPON ESTIMATES. ACTUAL HOURS INCURRED MAY FLUCTUATE THROUGHOUT THE YEAR.

## **Additional Data**

**Return to Form**

**Software ID:**

**Software Version:**

**SCHEDULE R  
(Form 990)**

**Related Organizations and Unrelated Partnerships**

OMB No. 1545-0047

**2023**

**Open to Public  
Inspection**

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.  
Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Department of the Treasury  
Internal Revenue Service

Name of the organization  
INSTITUTE OF INTERNATIONAL EDUCATION INC

**Employer identification number**

13-1624046

**Part I Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
<b>(1)</b> IIE NETWORKS LLC 1 WORLD TRADE CTR FL 36 NEW YORK, NY 100070090 46-5009643	HOLDING CO	DE	0	50,000	IIE
<b>(2)</b> IIE OVERSEAS LLC TVERSKOY BULEVAR 14 BLDG 1 MOSCOW 125009 RS 83-4178554	HOLDING CO	DE	0	0	IIE

**Part II Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No

**Part III Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

**Part IV Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
(1) CHARITABLE REMAINDER TRUST (1)	EDUCATION GRANTS	TX	IIE	T				Yes	

**Part V Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note.** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

- a** Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity . . . . .
- b** Gift, grant, or capital contribution to related organization(s) . . . . .
- c** Gift, grant, or capital contribution from related organization(s) . . . . .
- d** Loans or loan guarantees to or for related organization(s) . . . . .
- e** Loans or loan guarantees by related organization(s) . . . . .
- f** Dividends from related organization(s) . . . . .
- g** Sale of assets to related organization(s) . . . . .
- h** Purchase of assets from related organization(s) . . . . .
- i** Exchange of assets with related organization(s) . . . . .
- j** Lease of facilities, equipment, or other assets to related organization(s) . . . . .
- k** Lease of facilities, equipment, or other assets from related organization(s) . . . . .
- l** Performance of services or membership or fundraising solicitations for related organization(s)
- m** Performance of services or membership or fundraising solicitations by related organization(s) . . . . .
- n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) . . . . .
- o** Sharing of paid employees with related organization(s) . . . . .
- p** Reimbursement paid to related organization(s) for expenses . . . . .
- q** Reimbursement paid by related organization(s) for expenses . . . . .
- r** Other transfer of cash or property to related organization(s) . . . . .
- s** Other transfer of cash or property from related organization(s) . . . . .

	Yes	No
<b>1a</b>		No
<b>1b</b>		No
<b>1c</b>		No
<b>1d</b>		No
<b>1e</b>		No
<b>1f</b>		No
<b>1g</b>		No
<b>1h</b>		No
<b>1i</b>		No
<b>1j</b>		No
<b>1k</b>		No
<b>1l</b>	Yes	
<b>1m</b>	Yes	
<b>1n</b>		No
<b>1o</b>		No
<b>1p</b>	Yes	
<b>1q</b>	Yes	
<b>1r</b>		No
<b>1s</b>		No

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved



**Part VII Supplemental Information**

Provide additional information for responses to questions on Schedule R. See instructions.

Return Reference

Explanation

Schedule R (Form 990) 2023

**Additional Data**[Return to Form](#)**Software ID:****Software Version:**