SCHEDULE O (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization: PENCIL Foundation

Employer identification number: 58 1475675

Part III, Item 4d Additional program services are:

Math Partners - helps students strengthen basic math skills and concepts with a special emphasis on solving word problems. A total of 145 trained community volunteers assisted 690 students struggling in math.

LP PENCIL Box - gets school supplies into the hands of children who need them through generous community donations. This free school supply store provides basic school supplies and gently used office supplies to teachers for their students. Since 2005, over $1.6 million in supplies have reached classrooms across Nashville.

Financial Literacy - uses trained volunteers to educate high school students about smart money management through a series of FDIC Money Smart modules. The curriculum helps young adults build financial knowledge, financial confidence, and use banking services effectively. Over 250 students were served this academic year.

St. Thomas Science Scholars - provides an opportunity for rising sophomores to explore the many exciting and challenging options in the healthcare profession. Conducted at St. Thomas Hospital, students are introduced to the areas of anatomy and physiology and engage in hands-on activities taught by medical professionals. 44 students participated in the program this year.

Maplewood Family Resource Center - builds a suport system for students at Maplewood High to thrive by linking community organizations, school personnel and families together to help remove barriers that may hinder academic success and productive adulthood. Services were provided to 873 students this school year.

Student Writers Showcase - allows teachers to submit students work already being done in the classroom in an exciting writing competition. Judges are some of Nashville's best writers. Over 200 students participated and $1,840 in cash prizes was awarded

Name of the organization

Employer identification number

Part VI, Line 11

990 is reviewed annually by members of PENCIL's Finance Committee, a subcommittee of PENCIL's Board of Directors.

Part VI, Line 15

The annual performance of the Executive Director is reviewed and evaluated each year by a combination of the current year's board chairman and the prior year's board chair. The salary is continuously evaluated by use of data provided by Nashville-based Center for Nonprofit Management for similarly qualified persons serving in the Executive Director's role within nonprofit organizations of comparable size and scope.

Part VI, Line 19

A disclosure file that contains application for exemption and three years of 990 filings is maintained by the Finance Director. Audited financial statements are available upon request and is a matter of public record through Givingmatters.com, the online non-profit website housed by the Community Foundation of Middle Tennessee.

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Schedule

Schedule O (Form 990) is used by an organization that files Form 990 to provide the IRS with narrative information required for responses to specific questions on Form 990, or to explain the organization's operations or responses to various questions. It allows organizations to supplement information reported on Form 990.

Who Must File

All organizations that file Form 990 must file Schedule O (Form 990). At a minimum, the schedule must be used to answer Form 990, Part VI, lines 10 and 19. If an organization is not required to file Form 990 but chooses to do so, it must file a complete return and provide all of the information requested, including the required schedules.

Specific Instructions

Use as many continuation sheets of Schedule O (Form 990) as needed.

Complete the required information on the appropriate line of Form 990 or its schedules prior to using Schedule O (Form 990).

Identify clearly the specific part and line(s) of Form 990 or its schedule(s) to which each response relates. Follow the part and line sequence of Form 990 or the part and line sequence of its schedule(s).

Late return. If the return is not filed by the due date (including any extension granted), use Schedule O (Form 990) to provide a statement giving the reasons for not filing on time.

Amended return. If the organization checked the *Amended Return* box on Form 990, line B, use Schedule O (Form 990) to list each part or schedule and line item of the Form 990 that was amended.

Group return. If the organization answered "Yes" to Form 990, line H(a) but "No" to line H(b), use a separate attachment to list the name, address, and EIN of each affiliated organization included in the group return. **Do not use** this schedule. See the Instructions for Form 990, *I. Group Return.*

Parts III, V, VI, VII, and XI. Use Schedule O (Form 990) to provide any narrative information required for the following questions.

1. Part III, *Statement of Program Service Accomplishments.*

a. "Yes" response to line 2.

b. "Yes" response to line 3.

c. Other program services on line 4d.

2. "No" response to Part V, *Statements Regarding Other IRS Filings and Tax Compliance,* line 3b.

3. Part VI, *Governance, Management, and Disclosure.*

a. Material differences in voting rights in line 1a.

b. "Yes" responses to lines 2–7.

c. "No" responses to lines 8 or 9b.

d. Description of process for review, if any, on line 10.

e. "Yes" response to line 11.

f. "Yes" response to line 12c.

g. Description of process for determining compensation on lines 15a and 15b.

h. Description for making documents public on lines 18 and 19.

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

a. Estimate of average hours per week, if any, devoted to related organizations for which compensation was reported in columns (E) or (F).

b. Description of reasonable efforts undertaken in regard to column (E).

5. Part XI, *Financial Statements and Reporting.*

a. Change in accounting method or description of other accounting method used on line 1.

b. Change in committee oversight review from prior year on line 2c.

c. "No" response to line 3b.

Schedule G (Form 990 or 990-EZ). If applicable, use Schedule O (Form 990) to describe payments of fundraising expenses or reimbursements as required in Part 1, line 2b, column (v).

Schedule K (Form 990). If applicable, use Schedule O (Form 990) to describe the organization's use of alternative 12-month reporting periods with respect to bond issues reported on Schedule K (Form 990).

Schedule L (Form 990 or 990-EZ). Use Schedule O (Form 990) if additional space is needed to report information required by Schedule L (Form 990 or 990-EZ).

Schedule R (Form 990). Use Schedule O (Form 990) to provide the group exemption relationships described on Schedule R (Form 990).

Other. Use Schedule O (Form 990) to provide narrative explanations and descriptions to other specific questions. The narrative provided should refer and relate to a particular line and response on the form.