

Form **990**
Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except 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.

OMB No. 1545-0047
2020
Open to Public Inspection

A For the 2020 calendar year, or tax year beginning 10-01-2020, and ending 09-30-2021

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

C Name of organization
THE CONCORD CONSORTIUM INCORPORATED

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) Room/suite
25 LOVE LANE

City or town, state or province, country, and ZIP or foreign postal code
CONCORD, MA 01742

D Employer identification number
04-3254131

E Telephone number
(978) 405-3200

G Gross receipts \$ 7,970,420

F Name and address of principal officer:
LAWRENCE BEHAN
25 LOVE LANE
CONCORD, MA 01742

H(a) Is this a group return for subordinates? Yes No

H(b) Are all subordinates included? Yes No
If "No," attach a list. (see instructions)

H(c) Group exemption number ▶

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

J Website: ▶ WWW.CONCORD.ORG

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: 1994

M State of legal domicile: MA

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
TO IGNITE LARGE-SCALE IMPROVEMENTS IN TEACHING AND LEARNING THROUGH TECHNOLOGY.

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)	15
4 Number of independent voting members of the governing body (Part VI, line 1b)	14
5 Total number of individuals employed in calendar year 2020 (Part V, line 2a)	53
6 Total number of volunteers (estimate if necessary)	14
7a Total unrelated business revenue from Part VIII, column (C), line 12	0
7b Net unrelated business taxable income from Form 990-T, line 39	0

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	8,479,847	7,479,792
9 Program service revenue (Part VIII, line 2g)	122,955	480,449
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	2,987	773
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0	9,406
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	8,605,789	7,970,420

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	0	0
14 Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	6,182,905	5,364,488
16a Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b Total fundraising expenses (Part IX, column (D), line 25) ▶ 0		
17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	3,495,390	2,499,454
18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	9,678,295	7,863,942
19 Revenue less expenses. Subtract line 18 from line 12	-1,072,506	106,478

	Beginning of Current Year	End of Year
20 Total assets (Part X, line 16)	1,599,668	1,988,565
21 Total liabilities (Part X, line 26)	1,699,371	1,981,790
22 Net assets or fund balances. Subtract line 21 from line 20	-99,703	6,775

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
Date 2022-03-30

LAWRENCE BEHAN CFO
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date 2022-03-30	Check <input type="checkbox"/> if self-employed	PTIN P01584539
Firm's name ▶ AAFCPAS INC	Firm's EIN ▶ 04-2571780			
Firm's address ▶ 50 WASHINGTON STREET WESTBOROUGH, MA 01581	Phone no. (508) 366-9100			

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 CONCORD CONSORTIUM IS A RESEARCH AND DEVELOPMENT ORGANIZATION DEDICATED TO TRANSFORMING EDUCATION THROUGH TECHNOLOGY...(CONTINUED ON SCHEDULE O)

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 \$ 558,049 including grants of \$) (Revenue \$)

See Additional Data

4b (Code:) (Expenses \$ 485,513 including grants of \$) (Revenue \$)

See Additional Data

4c (Code:) (Expenses \$ 733,145 including grants of \$) (Revenue \$)

See Additional Data

(Code:) (Expenses \$ 4,164,278 including grants of \$) (Revenue \$ 489,855)

THE CONCORD CONSORTIUM PRODUCED TECHNOLOGY-BASED CURRICULUM MATERIALS FOR SCIENCE, MATH, AND ENGINEERING FOR STUDENTS IN ELEMENTARY SCHOOL THROUGH COLLEGE. OUR MAJOR PROGRAMS PRODUCED DOZENS OF CURRICULAR UNITS AND ACTIVITIES SUPPORTING LEARNING IN PHYSICS, PHYSICAL SCIENCE, EARTH AND ENVIRONMENTAL SCIENCE, CHEMISTRY, BIOLOGY, MATHEMATICS, DATA SCIENCE, AND ENGINEERING. ASIDE FROM OUR MAJOR PROGRAMS, WE GATHERED AND INVESTIGATED RESEARCH DATA FROM 40 ADDITIONAL PROGRAMS THAT INFORM THE DEVELOPMENT AND REFINEMENT OF CURRICULUM MATERIALS, AND BENEFIT OTHER RESEARCHERS AND ORGANIZATIONS DEVELOPING EDUCATIONAL TECHNOLOGY.

4d Other program services (Describe in Schedule O.)
(Expenses \$ 4,164,278 including grants of \$) (Revenue \$ 489,855)

4e Total program service expenses ▶ 5,940,985

Part IV Checklist of Required Schedules

Table with 3 columns: Question ID, Question Text, Yes, No. Rows include questions 1 through 21 regarding organizational requirements, such as political campaign activities, lobbying, and financial reporting.

Part IV Checklist of Required Schedules (continued)

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

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

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable		83
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		0
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	Yes	

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 (15), 1b (14), 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 MA, CA
18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (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: LAWRENCE BEHAN CFO 25 LOVE LANE CONCORD, MA 01742 (978) 405-3200

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 instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, 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 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)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) CHAD DORSEY PRESIDENT/CEO	40.00	X		X			213,639	0	44,031	
(2) LESLIE BONDARYK DIRECTOR OF TECHNOLOGY	40.00					X	148,993	0	37,710	
(3) CHARLES XIE PI & SENIOR RESEARCHER	40.00					X	135,813	0	30,507	
(4) AMY PALLANT PI & SENIOR RESEARCHER	40.00					X	128,171	0	35,988	
(5) CAROLYN STAUDT PI & SENIOR CURRICULUM DEVELOPER	40.00					X	136,702	0	24,178	
(6) KIRK SWENSON SENIOR SOFTWARE ARCHITECT	40.00					X	134,252	0	15,113	
(7) LAWRENCE BEHAN CFO	40.00			X			135,796	0	14,981	
(8) YU-LING WU CFO (UNTIL 3/31/20)	40.00			X			68,980	0	7,842	
(9) HELEN QUINN CHAIR	1.00	X		X			0	0	0	
(10) DIEDERICH FRAMHEIN TREASURER	2.50	X		X			0	0	0	
(11) LISA BUONCUORE CLERK	1.00	X		X			0	0	0	
(12) KATE BYRNE BOARD MEMBER	0.50	X					0	0	0	
(13) KATHY HURLEY BOARD MEMBER	0.50	X					0	0	0	
(14) KIM KASTENS BOARD MEMBER	0.50	X					0	0	0	
(15) PAULETTE ALTMAIER BOARD MEMBER	0.50	X					0	0	0	
(16) PAMELA PELLETIER BOARD MEMBER	0.50	X					0	0	0	
(17) CHRIS MANOS BOARD MEMBER	0.50	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)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(18) CARLOS MORALES BOARD MEMBER	0.50	X						0	0	0
(19) JUDY CAI BOARD MEMBER	0.50	X						0	0	0
(20) HEIDI SCHWEINGRUBER BOARD MEMBER	0.50	X						0	0	0
(21) MAYA GARCIA BOARD MEMBER	0.50	X						0	0	0
(22) DAVID VAN ESSELSTYN BOARD MEMBER	0.50	X						0	0	0
(23) MARGARET HONEY BOARD MEMBER (UNTIL 12/2020)	0.50	X						0	0	0
(24) LEV SVIRIDOV BOARD MEMBER (UNTIL 12/2020)	0.50	X						0	0	0
(25) LAUREN WALTERS BOARD MEMBER (UNTIL 12/2020)	0.50	X						0	0	0
1b Sub-Total										
1c Total from continuation sheets to Part VII, Section A										
1d Total (add lines 1b and 1c)							1,102,346	0		210,350

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 ▶ 17

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		No
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	Yes	
5 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
PIOTR JANIK IT CONSULTING ULGEN AUGUSTA FIEDORFA-NILA 17/6 KRACOW 31-209 PL	PROGRAMMING	119,047

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 ▶ 1

Part VIII Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	1a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	7,392,011				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	87,781				
	g Noncash contributions included in lines 1a - 1f:\$	1g					
	h Total. Add lines 1a-1f			7,479,792			
Program Service Revenue	2a CONTRACT REVENUE	Business Code					
		541900	480,449	480,449			
	b						
	c						
	d						
	e						
	f All other program service revenue.						
g Total. Add lines 2a-2f.		480,449					
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		773			773	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
	6a Gross rents	(i) Real	(ii) Personal				
		6b Less: rental expenses					
		6c Rental income or (loss)					
		d Net rental income or (loss)					
	7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		7b Less: cost or other basis and sales expenses					
		7c Gain or (loss)					
		d Net gain or (loss)					
	8a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18						
		8b Less: direct expenses					
		c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities. See Part IV, line 19						
9b Less: direct expenses							
c Net income or (loss) from gaming activities							
10a Gross sales of inventory, less returns and allowances							
	10b Less: cost of goods sold						
	c Net income or (loss) from sales of inventory						
Miscellaneous Revenue	Business Code						
11a MISCELLANEOUS INCOME	900099	9,406	9,406				
b							
c							
d All other revenue							
e Total. Add lines 11a-11d		9,406					
12 Total revenue. See instructions		7,970,420	489,855	0	773		

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	486,201	120,285	365,916	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	3,675,503	2,971,710	703,793	
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)	372,367	372,367		
9 Other employee benefits	514,726	41,552	473,174	
10 Payroll taxes	315,691	315,691		
11 Fees for services (non-employees):				
a Management				
b Legal	10,136		10,136	
c Accounting	31,200		31,200	
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	512,838	480,816	32,022	
12 Advertising and promotion				
13 Office expenses	58,085	45,488	12,597	
14 Information technology	386,103	239,948	146,155	
15 Royalties				
16 Occupancy	353,355	223,813	129,542	
17 Travel	33,878	33,878		
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	5,297	4,936	361	
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	5,236	5,236		
23 Insurance	13,756		13,756	
24 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.)				
a SUBCONTRACTORS	1,038,203	1,038,203		
b PARTICIPANT SUPPORT	31,555	31,555		
c MISCELLANEOUS	14,759	12,601	2,158	
d DUES AND SUBSCRIPTIONS	5,053	2,906	2,147	
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	7,863,942	5,940,985	1,922,957	0
26 Joint costs. 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) Beginning of year		(B) End of year
Assets	1 Cash—non-interest-bearing	500	1	361
	2 Savings and temporary cash investments	670,813	2	1,072,942
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	797,497	4	830,740
	5 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		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	85,222	9	44,122
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	168,306		
	b Less: accumulated depreciation	166,450	7,092	1,856
	11 Investments—publicly traded securities		11	
	12 Investments—other securities. See Part IV, line 11		12	
	13 Investments—program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	38,544	15	38,544
16 Total assets. Add lines 1 through 15 (must equal line 33)	1,599,668	16	1,988,565	
Liabilities	17 Accounts payable and accrued expenses	627,692	17	905,380
	18 Grants payable		18	
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 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		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D	1,071,679	25	1,076,410
	26 Total liabilities. Add lines 17 through 25	1,699,371	26	1,981,790
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	-336,712	27	-213,949
	28 Net assets with donor restrictions	237,009	28	220,724
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
32 Total net assets or fund balances	-99,703	32	6,775	
33 Total liabilities and net assets/fund balances	1,599,668	33	1,988,565	

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	7,970,420
2	Total expenses (must equal Part IX, column (A), line 25)	2	7,863,942
3	Revenue less expenses. Subtract line 2 from line 1	3	106,478
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	-99,703
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	6,775

Part XII Financial Statements and Reporting

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

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

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

Additional Data

Software ID:

Software Version:

EIN: 04-3254131

Name: THE CONCORD CONSORTIUM INCORPORATED

Form 990 (2020)

Form 990, Part III, Line 4a:

GEODE 2021 IN THE NO-COST EXTENSION YEAR OF THE GEODE PROJECT ([HTTPS://CONCORD.ORG/PROJECTS/GEODE](https://concord.org/projects/geode)), THE CONCORD CONSORTIUM (CC) COLLABORATED WITH PROJECT PARTNERS AT PENNSYLVANIA STATE UNIVERSITY (PSU). THE GOAL OF THE GEODE PROJECT IS TO DESIGN INNOVATIVE GEODYNAMIC MODELING SOFTWARE AND CURRICULUM MODULES FOR MIDDLE SCHOOL EARTH SCIENCE CLASSES. THE GEODE CURRICULUM IS DESIGNED TO HELP STUDENTS DEVELOP A CAUSAL, MODEL-BASED, SCIENTIFIC UNDERSTANDING OF PLATE TECTONICS. WE DO THIS BY ENABLING STUDENTS TO ENGAGE IN MODELING AND BUILD SOPHISTICATED EXPLANATIONS ABOUT GEOLOGICAL PROCESSES; CONDUCTING DESIGN-BASED RESEARCH TO STUDY STUDENT LEARNING AROUND PLATE TECTONICS AND ASSOCIATED GEOLOGICAL PROCESSES, MODELING PRACTICES, AND UNCERTAINTY-INFUSED ARGUMENTATION PRACTICES; AND STUDYING FEASIBILITY OF THE CURRICULUM AND MODELS ACROSS A LARGE NUMBER OF CLASSROOM SETTINGS. THE PRIMARY FOCUS OF THIS NO-COST EXTENSION YEAR HAS BEEN TO ANALYZE DATA AND DISSEMINATE OUR FINDINGS. THE DATA COLLECTED FROM CLASSROOM IMPLEMENTATIONS OF THE PLATE TECTONICS MODULE IN THE PRIOR YEAR WAS ANALYZED FOR SEVERAL PURPOSES. FIRST, THE PRE-POST INSTRUMENT WAS DESIGNED TO MEASURE THE EXTENT TO WHICH STUDENTS UNDERSTAND TECTONIC PHENOMENA FROM THE WHOLE PLATE SYSTEM PERSPECTIVE. WE ANALYZED PRE-POST TEST SCORING FOR 26 FOCUS TEACHERS. WE CAREFULLY REVIEWED STUDENT RESPONSES TO BOTH THE PROMPTS IN THE MODULE AND THE PRE-POST ASSESSMENT IN ORDER TO COMPLETE A FINAL REVISION OF BOTH THE MODULE AND THE ASSESSMENT. SECOND, WE DEVELOPED OR ARE COMPLETING THREE INSTRUCTIONAL VIDEOS TO PROVIDE SCIENTIFIC BACKGROUND FOR STUDENTS AND TEACHERS ON PARTICULARLY COMPLEX PHENOMENA. ONE VIDEO FOCUSES ON HOW GEOSCIENTISTS THINK OF PLATE TECTONICS AS A THREE-DIMENSIONAL SYSTEM, A SECOND FOCUSES ON DIVERGENT BOUNDARIES DIRECTLY ADDRESSING MANY STUDENT MISCONCEPTIONS, AND THE THIRD VIDEO IS AN ANIMATION THAT IS CURRENTLY BEING DEVELOPED THAT EXPLORES MANTLE CONVECTION AND PLATE MOTION. THE FIRST TWO VIDEOS HAVE BEEN EMBEDDED WITH THE CURRICULUM MODULE AND CAN BE FOUND ON THE TEACHER SUPPORT WEBPAGE; THE THIRD ONE WILL BE INCLUDED WHEN IT IS COMPLETED IN JANUARY 2022. THIRD, WE ANALYZED THE USE OF OUR ONLINE TEACHER GUIDE, THE TEACHER EDITION (TED). WE STUDIED 26 TEACHERS BY ANALYZING THE LOG FILES AUTOMATICALLY GENERATED WHEN THEY USED TED, TEACHER POST-IMPLEMENTATION SURVEYS AND INTERVIEWS, STUDENT LOG FILES ASSOCIATED WITH THE ONLINE MODULE, AND STUDENT LEARNING GAINS FROM PRE-TEST TO POST-TEST. RESULTS INDICATED THAT THERE WERE LARGE VARIATIONS IN THE AMOUNTS AND TYPES OF TED FEATURES TEACHERS ACCESSED, MIDDLE SCHOOL TEACHERS ACCESSED SIGNIFICANTLY MORE TED FEATURES THAN HIGH SCHOOL TEACHERS, STUDENTS OF TEACHERS WHO USED TED DURING CLASS TIME MADE SIGNIFICANTLY HIGHER LEARNING GAINS, AND TEACHERS VALUED TIPS FOCUSED ON STUDENT ASSESSMENT OVER ALL OTHER TYPES OF EMBEDDED SUPPORT. A PAPER WITH THESE RESEARCH RESULTS WAS SUBMITTED TO THE JOURNAL OF SCIENCE TEACHER EDUCATION. FOURTH, WE CONDUCTED RESEARCH TO BETTER UNDERSTAND HOW THE TECTONIC EXPLORER SIMULATION SUPPORTS STUDENT LEARNING AND REASONING. WE CONDUCTED A "TALK-ALoud" LABORATORY STUDY, IN WHICH STUDENTS WERE ASKED TO USE THE SIMULATION AND SHARE THEIR THINKING AS THEY COMPLETE A TASK. A RESEARCHER OBSERVED THE STUDENTS AND PROMPTED THEM WITH FOLLOW-UP QUESTIONS TO PROBE THEIR REASONING. ANALYSIS IS ONGOING AND FOCUSED ON 1) WHAT THE LEARNERS NOTICE AND WHAT THEY INFER ABOUT PLATE TECTONICS RELATIONSHIPS, 2) THE RESOURCES USED BY LEARNERS TO MAKE SENSE OF GEOLOGICAL PHENOMENA, AND 3) HOW LEARNERS ARE SENSITIVE TO THE PARTICULAR TASK FRAMING AND PROMPTS. FINALLY, WE HAVE ANALYZED TASKS WITHIN THE MODULE TO EXPLORE HOW STUDENTS USE MODELS TO BUILD A SEQUENTIAL STORYLINE RELATED TO PLATE INTERACTIONS. WE HAVE ANALYZED THE WORK OF 1,000 STUDENTS FOCUSING ON THE WAYS IN WHICH THE TECTONIC EXPLORER IS SUPPORTING STUDENT DEVELOPMENT OF SEQUENTIAL REASONING REQUIRED TO EXPLAIN AN ASPECT OF PLATE INTERACTIONS. IN ADDITION TO RESEARCH EFFORTS, WE DISSEMINATED THE MATERIALS WIDELY. THE PLATE TECTONICS MODULE WAS MADE FREELY AVAILABLE ONLINE ON CC'S STEM RESOURCE FINDER IN 2019. IN THE 2020-2021 SCHOOL YEAR, IT WAS USED BY OVER 890 TEACHERS AND 47,500 STUDENTS IN 2,140 CLASSES. WE ALSO ADDED THE MODULE TO THE NATIONAL GEOGRAPHIC EDUCATION WEBSITE. SOCIAL MEDIA AND BLOG POSTS WERE USED TO PUBLICIZE THE AVAILABILITY OF THESE MATERIALS. WE PRESENTED AT NARST AND NSTA, PUBLISHED A PAPER IN THE EARTH SCIENTIST, SUBMITTED ADDITIONAL TEACHER PRACTITIONER PAPERS AND RESEARCH PAPERS TO PEER-REVIEWED JOURNALS, AND SUBMITTED THREE PROPOSALS TO PARTICIPATE IN FUTURE CONFERENCES.

Form 990, Part III, Line 4b:

GEOHAZARD 2021 IN THE SECOND YEAR OF THE GEOHAZARD PROJECT ([HTTPS://CONCORD.ORG/PROJECTS/GEOHAZARD](https://concord.org/projects/geohazard)), THE CONCORD CONSORTIUM (CC) COLLABORATED WITH PROJECT PARTNERS AT PENNSYLVANIA STATE UNIVERSITY (PSU), TERC, AND NATIONAL GEOGRAPHIC SOCIETY (NGS). THE FIRST GOAL OF THE PROJECT IS TO DEVELOP MIDDLE AND HIGH SCHOOL TECHNOLOGICALLY ENHANCED CURRICULAR MATERIALS THAT FEATURE COMPUTATIONAL MODELS FOR THREE NATURAL HAZARDS (HURRICANES, WILDFIRES, AND INLAND FLOODING) THROUGH MULTIPLE ITERATIVE DESIGN RESEARCH CYCLES. THE SECOND GOAL IS TO CONDUCT TARGETED RESEARCH ON BOTH TEACHING AND LEARNING WITH THESE MATERIALS. FINALLY, WE PLAN TO DISSEMINATE REVISED MATERIALS TO A NATIONAL AUDIENCE THROUGH WEB RESOURCES ON THE NGS EDUCATION AND CC WEBSITES, AND BY PUBLISHING RESEARCH RESULTS AND PRESENTING AT CONFERENCES. EVEN DURING THE PANDEMIC, WE WERE ABLE TO RECRUIT TEACHERS TO USE OUR MATERIALS AS THEY WERE AVAILABLE ONLINE WITH EXTENSIVE TEACHER SUPPORT RESOURCES. WE WERE ALSO ABLE TO MOVE THE DESIGN AND DEVELOPMENT OF OUR THREE CURRICULUM UNITS ON NATURAL HAZARDS AND HUMAN RISK AND IMPACT FORWARD. EACH MODULE CENTERS AROUND ONE NATURAL HAZARD (HURRICANES, WILDFIRES, AND INLAND FLOODING) AND INCLUDES AN EMBEDDED MODEL OF THE PHENOMENON. THE PROJECT REACHED SEVERAL SIGNIFICANT MILESTONES DURING THE YEAR. FIRST, WE COMPLETED THE DESIGN AND DEVELOPMENT OF THE FLOOD MODEL AND ASSOCIATED FLOOD MODULE. EARLY IN THE YEAR, WE TESTED THE MATERIALS WITH A SMALL GROUP OF TEACHERS. BASED ON THEIR FEEDBACK, WE REVISED THE MODEL AND CURRICULUM MODULE. WE RECRUITED NINE TEACHERS TO PILOT TEST THE UPDATED CURRICULUM AND ASSESSMENTS IN THE FALL OF 2021. SECOND, WE ANALYZED THE STUDENT RESPONSES FROM FALL IMPLEMENTATIONS OF THE WILDFIRE MODULE AND SUBSEQUENTLY REVISED BOTH THE WILDFIRE MODEL AND CURRICULUM. WE RECRUITED 86 TEACHERS TO IMPLEMENT THE WILDFIRE MODULE AND ASSESSMENTS IN THE 2021-22 SCHOOL YEAR. THE HURRICANE MODULE WAS MADE FREELY AVAILABLE TO THE PUBLIC AT THE START OF THE 2020 SCHOOL YEAR AND INCLUDES PRE- AND POST-ASSESSMENTS AS WELL AS EXTENSIVE TEACHER SUPPORT MATERIALS. WE ARE CURRENTLY ANALYZING ANONYMIZED DATA FROM CLASSROOM IMPLEMENTATIONS AND WILL USE THOSE DATA TO INFORM REVISIONS TO BE RELEASED IN JANUARY 2022. WE HONED OUR RESEARCH PLAN AND CLARIFIED A NEW RISK AND UNCERTAINTY FRAMEWORK FOCUSING ON TEMPORAL, STRUCTURAL, METRICAL, AND TRANSLATIONAL UNCERTAINTY. WE EMBEDDED TASKS IN THE MODULES AND INSTRUMENTS TO ASSESS HOW STUDENTS ENGAGE WITH UNCERTAINTY. STUDENT RESPONSES AND TEACHER FEEDBACK ON THESE ITEMS WILL BE ANALYZED AT THE END OF THE 2021-22 SCHOOL YEAR. IN ADDITION, WE INSTRUMENTED OUR TEACHER DASHBOARD TO COLLECT LOGS OF TEACHER ACTIONS. THIS DATA WILL ALSO BE ANALYZED AT THE END OF THE 2021-22 SCHOOL YEAR. THE HURRICANE AND WILDFIRE MATERIALS, INCLUDING MODULES, TEACHER EDITIONS, AND ASSESSMENTS, WERE DISSEMINATED WIDELY TO THE PUBLIC. THE MATERIALS ARE HOSTED ON THE CC STEM RESOURCE FINDER AS WELL AS ON THE NATIONAL GEOGRAPHIC EDUCATION WEBSITE. WE ALSO PRESENTED OUR WORK AT VARIOUS TEACHERS AND RESEARCHERS' ONLINE CONFERENCES.

Form 990, Part III, Line 4c:

INQUIRYSPACE 2 2021 THE MAJOR GOAL OF THE INQUIRYSPACE 2 PROJECT ([HTTPS://CONCORD.ORG/INQUIRYSPACE](https://concord.org/inquiryspace)) AT THE CONCORD CONSORTIUM (CC) IS TO MAKE IT POSSIBLE FOR ANY SCHOOL TO OFFER STUDENTS THE CHANCE TO EXPERIENCE THE EXCITING PRACTICE OF SCIENCE AS AN INTEGRAL PART OF SCIENCE LEARNING. THE PROJECT SET THREE GOALS TO (1) REDUCE BARRIERS TO IMPLEMENTATION AND INCREASE EQUITABLE PARTICIPATION IN SCIENCE BY DEVELOPING TECHNOLOGIES THAT SUPPORT ENGAGEMENT IN EXPERIMENTAL DESIGN, DATA COLLECTION, AND ANALYSIS IN HIGH SCHOOL BIOLOGY, PHYSICS, AND CHEMISTRY CLASSES, (2) DEVELOP CURRICULAR MATERIALS THAT COHERENTLY SCAFFOLD STUDENTS IN DEVELOPING THE NECESSARY KNOWLEDGE, SKILLS, AND ABILITIES TO EXPLORE NATURAL PHENOMENA, AND (3) DEVELOP TEACHER MATERIALS TO SUPPORT A PEDAGOGICAL APPROACH THAT FACILITATES STUDENT LEARNING THROUGH INDEPENDENT EXPERIMENTATION. SIGNIFICANT EFFORT HAS BEEN DEDICATED TOWARD CURRICULUM, RESEARCH, AND TECHNOLOGY DEVELOPMENT DURING THE FIFTH PROJECT YEAR BY CC IN COLLABORATION WITH OUR PARTNER AT PHYSICS FRONT IN SANTA CRUZ, CA. GIVEN OUR EXPECTATION THAT THE 2020-21 SCHOOL YEAR WOULD LIKELY BE SOME FORM OF REMOTE OR HYBRID LEARNING ENVIRONMENT, WE PLANNED FOR SUPPORTING TEACHERS IN THE DEVELOPMENT OF A UNIT OR SERIES OF UNITS BASED ON INQUIRYSPACE DESIGN PRINCIPLES TO INTEGRATE THE IS2 APPROACH FOR ENGAGING STUDENTS IN SCIENCE PRACTICES AS THEY WORK TOWARD INDEPENDENT EXPERIMENTATION. THE 2020 SUMMER PD FOCUSED ON DEVELOPING THIS APPROACH WITH TEACHERS TO ALLOW US TO CONTINUE TO RESEARCH PEDAGOGICAL AND CURRICULAR PATHS FOR SCAFFOLDING EXPERIMENTAL DESIGN, DATA COLLECTION AND ANALYSIS, AND SCIENTIFIC EXPLANATION. BECAUSE THE IS2 INVESTIGATIONS WERE ORIGINALLY DESIGNED WITH THE ASSUMPTION THAT STUDENTS WOULD BE IN CLASS, WE ASSUMED THAT MOST TEACHERS WOULD NOT BE ABLE TO IMPLEMENT THE IS2 INVESTIGATIONS AS INTENDED. AS A RESULT, WE TOOK AN APPROACH FOCUSED ON SUPPORTING TEACHERS IN CREATING THE KINDS OF UNITS THAT WOULD MAKE SENSE GIVEN THEIR UNIQUE LEARNING ENVIRONMENTS. THE RESULTING ENACTMENTS REPRESENTED A MIXTURE OF A) NEW INQUIRY-ORIENTED UNITS DEVELOPED BY TEACHERS AND B) ADAPTATIONS OF IS2 INVESTIGATIONS BY SOME TEACHERS DESIGNED TO MAKE THE INVESTIGATIONS WORK AS WELL AS THEY COULD GIVEN THE LIMITATIONS OF THE IN-PERSON TIME TEACHERS HAD WITH STUDENTS. WHEN CONSIDERING THE ACTIVITIES LISTED BELOW, ONE SHOULD KEEP IN MIND THIS CONTEXT IN WHICH AT BEST SOME TEACHERS WERE ABLE TO IMPLEMENT AND ADAPT SOME PARTS OF OUR PREVIOUSLY DEVELOPED MATERIALS.

CURRICULUM: DESIGN AND DEVELOPMENT OF THE CURRICULUM FOR INQUIRYSPACE 2 REACHED THREE SIGNIFICANT MILESTONES DURING YEAR 5 OF THE PROJECT: (1) REVISING THE BIOLOGY CURRICULUM MODULE BASED ON TEACHER FEEDBACK, (2) DEVELOPMENT OF THE CHEMISTRY MODULE, AND (3) REFINEMENT OF PHYSICS MODULE, IN PARTICULAR THE DEVELOPMENT OF AN IN-LINE/ONLINE "TEACHER EDITION" AT THE REQUEST OF TEACHERS. SIMILAR IN-LINE/ONLINE TEACHER EDITIONS WERE ALSO THEN ADDED TO THE BIOLOGY AND CHEMISTRY MODULES. SIGNIFICANT EFFORT ALSO WENT INTO RECRUITING TEACHERS AND PLANNING FURTHER CURRICULUM PILOT TESTING FOR THE 2021-2022 SCHOOL YEAR, GIVEN THE PANDEMIC PREVENTING SIGNIFICANT TESTING OF IN-CLASS CURRICULUM MODULES DURING THE 2020-2021 SCHOOL YEAR. WE RAN A FIVE-DAY IN PERSON TEACHER TRAINING IN JULY 2021 FOR 22 TEACHERS.

RESEARCH: DURING YEAR 5, ADDITIONAL INQUIRYSPACE 2 MILESTONES IN RESEARCH OCCURRED. WE DRAFTED SEVEN PAPERS TOTAL, INCLUDING FOUR JURIED CONFERENCE PRESENTATIONS, ONE BLOG POST, AND TWO PRACTITIONER PAPER ARTICLES. THE PROJECT CONTINUED TO ANALYZE SCREENCAST VIDEO DATA FROM PHYSICS IMPLEMENTATIONS FROM THE PREVIOUS YEAR, WHEN CLASSES WERE IN SESSION. THE PANDEMIC OFFERED AN OPPORTUNITY FOR A DEEPER DIVE INTO OUR FIELD DATA, WHICH WOULD NOT HAVE BEEN POSSIBLE OTHERWISE. IN PARTICULAR, WE EXPLORED THE ROLE OF SIMULATIONS IN DEVELOPMENT OF INQUIRY SKILLS AND PRACTICES. THE CONTINUED ANALYSIS OF DATA COLLECTED BY CC RESEARCHERS HAS INFORMED IMPROVEMENTS TO BOTH THE CURRICULUM AND THE TECHNOLOGY DEVELOPED AT CC.

TECHNOLOGY: ONE AREA THAT CHALLENGES BOTH STUDENTS AND TEACHERS IS THE ENTRY OF HIERARCHICALLY STRUCTURED DATA (OR THE ENTRY OF DATA INTO A HIERARCHICALLY STRUCTURED TABLE). IT IS COMMON FOR EXPERIMENTAL DATA TO HAVE MULTIPLE LEVELS OF HIERARCHY-STUDENTS EXPLORE VARIOUS PARAMETERS, CREATING RUNS FOR EACH PARAMETER CHANGE AND MULTIPLE TRIALS FOR EACH RUN. BASED ON OBSERVING USER INTERACTIONS (IN CLASS AND ON SCREENCAST VIDEOS) AS WELL AS INFORMATION FROM TEACHER INTERVIEWS, WE MADE ADJUSTMENTS TO THE USER INTERFACE TO FURTHER FACILITATE DATA ENTRY IN TABLES OF THIS KIND. WE ARE FIELD TESTING DURING THE 2021-22 ACADEMIC YEAR IN ORDER TO ASSESS PROGRESS WITH IMPROVED ACCESS TO UNDERSTANDING AND USING HIERARCHICALLY STRUCTURED DATA FOR LEARNING.

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
▶ Attach to Form 990 or Form 990-EZ.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Name of the organization
THE CONCORD CONSORTIUM INCORPORATED

Employer identification number
04-3254131

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 or 990-EZ).)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An 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 in 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		
Total						

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) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . . .	8,813,256	8,954,599	9,848,382	8,479,847	7,479,792	43,575,876
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . . .						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 Total. Add lines 1 through 3	8,813,256	8,954,599	9,848,382	8,479,847	7,479,792	43,575,876
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) . . .						
6 Public support. Subtract line 5 from line 4.						43,575,876

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
7 Amounts from line 4. . .	8,813,256	8,954,599	9,848,382	8,479,847	7,479,792	43,575,876
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . . .	25,067	2,037	5,846	2,987	773	36,710
9 Net income from unrelated business activities, whether or not the business is regularly carried on. . .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). . .						
11 Total support. Add lines 7 through 10						43,612,586
12 Gross receipts from related activities, etc. (see instructions)					12	1,610,675

13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

14 Public support percentage for 2020 (line 6, column (f) divided by line 11, column (f))	14	99.920 %
15 Public support percentage for 2019 Schedule A, Part II, line 14	15	99.600 %

16a 33 1/3% support test—2020. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

b 33 1/3% support test—2019. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

17a 10%-facts-and-circumstances test—2020. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

b 10%-facts-and-circumstances test—2019. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions

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

Calendar year (or fiscal year beginning in) ▶		(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
1	Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3	Gross receipts from activities that are not an unrelated trade or business under section 513						
4	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf. . .						
5	The value of services or facilities furnished by a governmental unit to the organization without charge						
6	Total. Add lines 1 through 5						
7a	Amounts included on lines 1, 2, and 3 received from disqualified persons						
b	Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c	Add lines 7a and 7b.						
8	Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶		(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
9	Amounts from line 6.						
10a	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources. . .						
b	Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c	Add lines 10a and 10b.						
11	Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on.						
12	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13	Total support. (Add lines 9, 10c, 11, and 12.)						

14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here.**

Section C. Computation of Public Support Percentage

15	Public support percentage for 2020 (line 8, column (f) divided by line 13, column (f))	15	
16	Public support percentage from 2019 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17	Investment income percentage for 2020 (line 10c, column (f) divided by line 13, column (f))	17	
18	Investment income percentage from 2019 Schedule A, Part III, line 17	18	

19a 33 1/3% support tests—2020. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization

b 33 1/3% support tests—2019. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization

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

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
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
c	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)? <i>If "Yes," explain in Part VI 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.</i>		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, 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).</i>		
b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6	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? <i>If "Yes," provide detail in Part VI.</i>		
7	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? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
9a	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))? <i>If "Yes," provide detail in Part VI.</i>		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
10a	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)? <i>If "Yes," answer line 10b below.</i>		
b	Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).</i>		

Part IV Supporting Organizations (continued)

		Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?		
a	A person who directly or indirectly controls, either alone or together with persons described in lines 11b and 11c below, the governing body of a supported organization?		
b	A family member of a person described in 11a above?		
c	A 35% controlled entity of a person described in 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
1	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>		
2	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
1	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
1	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?		
2	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>		
3	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

1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):		
a	<input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
b	<input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
c	<input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)		
2	Activities Test. Answer lines 2a and 2b below.		
a	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>	Yes	No
b	Did the activities described in line 2a 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>		
3	Parent of Supported Organizations. Answer lines 3a and 3b below.		
a	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	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)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	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)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8	
Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	1	
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):		
2	Acquisition indebtedness applicable to non-exempt use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	
Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> 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
1 Amounts paid to supported organizations to accomplish exempt purposes	1	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3	
4 Amounts paid to acquire exempt-use assets	4	
5 Qualified set-aside amounts (<i>prior IRS approval required - provide details in Part VI</i>)	5	
6 Other distributions (<i>describe in Part VI</i>). See instructions	6	
7 Total annual distributions. Add lines 1 through 6.	7	
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions	8	
9 Distributable amount for 2020 from Section C, line 6	9	
10 Line 8 amount divided by Line 9 amount	10	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2020	(iii) Distributable Amount for 2020
1 Distributable amount for 2020 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2020 (reasonable cause required-- <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2020:			
a From 2015.			
b From 2016.			
c From 2017.			
d From 2018.			
e From 2019.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2020 distributable amount			
i Carryover from 2015 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2020 from Section D, line 7:			
\$			
a Applied to underdistributions of prior years			
b Applied to 2020 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2021. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2016.			
b Excess from 2017.			
c Excess from 2018.			
d Excess from 2019.			
e Excess from 2020.			

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

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

OMB No. 1545-0047
2020
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.

Name of the organization
THE CONCORD CONSORTIUM INCORPORATED

Employer identification number
04-3254131

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.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 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? Yes No

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? Yes No

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).

Preservation of land for public use (e.g., recreation or education) Preservation of an historically important land area

Protection of natural habitat Preservation of a certified historic structure

Preservation of open space

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.

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

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? Yes No

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)? Yes No

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.

b 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:

(i) Revenue included on Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
a Public exhibition
b Scholarly research
c Preservation for future generations
d Loan or exchange programs
e Other
4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part 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:
Table with columns: Amount, 1c Beginning balance, 1d Additions during the year, 1e Distributions during the year, 1f Ending balance
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.

Table with 5 columns: (a) Current year, (b) Prior year, (c) Two years back, (d) Three years back, (e) Four years back. Rows include: 1a Beginning of year balance, b Contributions, c Net investment earnings, gains, and losses, d Grants or scholarships, e Other expenditures for facilities and programs, f Administrative expenses, g End of year balance.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
a Board designated or quasi-endowment
b Permanent endowment
c Term endowment
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:
(i) Unrelated organizations
(ii) Related organizations
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.

Table with 4 columns: (a) Cost or other basis (investment), (b) Cost or other basis (other), (c) Accumulated depreciation, (d) Book value. Rows include: 1a Land, b Buildings, c Leasehold improvements, d Equipment, e Other, Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).)

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.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other _____		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
(I)		
Total. (Column (b) must equal Form 990, Part X, col. (B) line 12.)		

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.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
(10)		
Total. (Column (b) must equal Form 990, Part X, col.(B) line 13.)		

Part IX Other Assets.

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

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 15.)	

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.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) CONDITIONAL GRANT ADVANCE	1,076,410
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	1,076,410

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.

1	Total revenue, gains, and other support per audited financial statements		1	8,330,563
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
a	Net unrealized gains (losses) on investments	2a		
b	Donated services and use of facilities	2b	360,143	
c	Recoveries of prior year grants	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	360,143
3	Subtract line 2e from line 1		3	7,970,420
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b		4c	0
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)		5	7,970,420

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.

1	Total expenses and losses per audited financial statements		1	8,224,085
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
a	Donated services and use of facilities	2a	360,143	
b	Prior year adjustments	2b		
c	Other losses	2c		
d	Other (Describe in Part XIII.)	2d		
e	Add lines 2a through 2d		2e	360,143
3	Subtract line 2e from line 1		3	7,863,942
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a		
b	Other (Describe in Part XIII.)	4b		
c	Add lines 4a and 4b		4c	0
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)		5	7,863,942

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
See Additional Data Table	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Additional Data

Software ID:

Software Version:

EIN: 04-3254131

Name: THE CONCORD CONSORTIUM INCORPORATED

Supplemental Information

Return Reference	Explanation
PART X, LINE 2:	THE ORGANIZATION ACCOUNTS FOR UNCERTAINTY IN INCOME TAXES IN ACCORDANCE WITH ASC TOPIC, INCOME TAXES. THIS STANDARD CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS AND PRESCRIBES A RECOGNITION THRESHOLD AND MEASUREMENT ATTRIBUTE FOR THE FINANCIAL STATEMENTS REGARDING A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN. THE ORGANIZATION HAS DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS WHICH QUALIFY FOR EITHER RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS AT SEPTEMBER 30, 2021. THE ORGANIZATION'S INFORMATION RETURNS ARE SUBJECT TO EXAMINATION BY THE FEDERAL AND STATE JURISDICTIONS.

Schedule J
(Form 990)

Compensation Information

OMB No. 1545-0047
2020
Open to Public Inspection

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 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

Name of the organization THE CONCORD CONSORTIUM INCORPORATED	Employer identification number 04-3254131
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Part I Questions Regarding Compensation

	Yes	No
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"/> Travel for companions <input type="checkbox"/> Tax idemnification and gross-up payments <input type="checkbox"/> Discretionary spending account <input type="checkbox"/> Housing allowance or residence for personal use <input type="checkbox"/> Payments for business use of personal residence <input type="checkbox"/> Health or social club dues or initiation fees <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	1b	
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?	2	
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 type="checkbox"/> Compensation committee <input type="checkbox"/> Independent compensation consultant <input type="checkbox"/> Form 990 of other organizations <input type="checkbox"/> Written employment contract <input type="checkbox"/> Compensation survey or study <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?	4a	No
b Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	No
c Participate in, or receive payment from, an equity-based compensation arrangement?	4c	No
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?	5a	No
b Any related organization?	5b	No
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?	6a	No
b Any related organization?	6b	No
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.	7	No
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.	8	No
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	9	

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 and/or 1099-MISC compensation			(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				
1 CHAD DORSEY PRESIDENT/CEO	(i)	213,639	0	0	21,364	22,667	257,670	0
	(ii)	0	0	0	0	0	0	0
2 LESLIE BONDARYK DIRECTOR OF TECHNOLOGY	(i)	148,993	0	0	14,899	22,811	186,703	0
	(ii)	0	0	0	0	0	0	0
3 CHARLES XIE PI & SENIOR RESEARCHER	(i)	135,813	0	0	13,581	16,926	166,320	0
	(ii)	0	0	0	0	0	0	0
4 AMY PALLANT PI & SENIOR RESEARCHER	(i)	128,171	0	0	12,817	23,171	164,159	0
	(ii)	0	0	0	0	0	0	0
5 CAROLYN STAUDT PI & SENIOR CURRICULUM DEVELOPER	(i)	136,702	0	0	13,670	10,508	160,880	0
	(ii)	0	0	0	0	0	0	0
6 LAWRENCE BEHAN CFO	(i)	135,796	0	0	13,580	1,401	150,777	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
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SCHEDULE O
(Form 990 or 990-EZ)

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 for the latest information.

OMB No. 1545-0047

2020

Open to Public Inspection

Department of the Treasury

Name of the organization

THE CONCORD CONSORTIUM INCORPORATED

Employer identification number

04-3254131

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART III, LINE 1	<p>OUR MISSION IS TO INNOVATE AND INSPIRE EQUITABLE, LARGE-SCALE IMPROVEMENTS IN STEM TEACHING AND LEARNING THROUGH TECHNOLOGY. OUR 47 PROJECTS DEVELOPED FREELY AVAILABLE SCIENCE, MATH, AND ENGINEERING SOFTWARE AND CURRICULUM MATERIALS AND MADE THEM AVAILABLE UNDER OPEN-SOURCE AND OPEN-CONTENT LICENSES. THESE MATERIALS HAVE BEEN ACCESSED THROUGH SEVERAL CONCORD CONSORTIUM WEBSITES BY OVER 3.2 MILLION UNIQUE USERS FROM 50 STATES AND 147 COUNTRIES (WITH MORE THAN 10 VISITS PER COUNTRY). OVER 68,000 TEACHERS AND OVER 1.1 MILLION STUDENTS HAVE USED ALL OF OUR ACTIVITY PORTALS OVER THEIR HISTORY. OUR MOLECULAR WORKBENCH SOFTWARE HAS BEEN DOWNLOADED A TOTAL OF OVER 1.5 MILLION TIMES. DURING 2021, OUR FREE BIENNIAL NEWSLETTER WAS MAILED TO OVER 6,000 SUBSCRIBERS AND THE ELECTRONIC VERSION WAS SENT TO OVER 49,000 SUBSCRIBERS. WE ALSO PUBLISHED PAPERS IN PEER-REVIEWED TEACHER PRACTITIONER AND RESEARCH JOURNALS.</p>

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 8B	NO MINUTES ARE REQUIRED TO BE TAKEN FOR THE FINANCE COMMITTEE MEETING. THE TREASURER AND CFO REPORT WHAT IS DISCUSSED IN THE MEETING TO THE FULL BOARD AND THE MINUTES ARE TAKEN AT THIS TIME AND BECOME PART OF THE BOARD MINUTES.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 11B	THE CFO SENDS THE FORM 990 TO THE BOARD FOR REVIEW AND DRAWS ATTENTION TO THE ITEMS WARRANTING ATTENTION BY THE BOARD MEMBERS. THE FINANCE COMMITTEE APPROVES THE FORM AND NO RESPONSE IS REQUIRED FROM THE REMAINING BOARD MEMBERS.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 12C	THE DIRECTORS AND OFFICERS ARE REQUIRED TO COMPLETE THE CONFLICT OF INTEREST POLICY FORM ON AN ANNUAL BASIS AND THE FORMS ARE REVIEWED BY THE FINANCE COMMITTEE BEFORE THE RECOMMENDATION IS MADE TO THE FULL BOARD FOR APPROVAL.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 15	THE COMPENSATION OF THE CEO IS REVIEWED AND APPROVED BY THE BOARD. THE COMPENSATION OF THE SENIOR MANAGERS ARE REVIEWED AND APPROVED BY THE CEO AND CFO.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART VI, SECTION C, LINE 19	THE GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY ARE AVAILABLE TO THE PUBLIC UPON REQUEST. THE FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC IN MASSACHUSETTS ATTORNEY GENERAL'S OFFICE OR UPON REQUEST.

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART XII, LINE 2C:	THE BOARD OF DIRECTORS ASSUMES RESPONSIBILITY FOR THE OVERSIGHT OF THE AUDIT OF ITS FINANCIAL STATEMENTS AND SELECTION OF THE INDEPENDENT ACCOUNTING FIRM.