Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

OMB No 1545-0047

2003

Open to Public Inspection

A For the 2003 calendar year, or tax year beginning OCT 1, 2003 and ending SEP 30, 2004

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

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

C Name of organization: JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW

Number and street (or P.O. box if mail is not delivered to street address): 1101 15TH STREET, N.W. Room/suite: 1212

City or town, state or country, and ZIP + 4: WASHINGTON, DC 20005

D Employer identification number: 23-7268143

E Telephone number: (202)467-5730

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

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

H and I are not applicable to section 527 organizations.

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

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

H(c) Are all affiliates included? N/A ☐ Yes ☐ No (If "No," attach a list.)

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

I Group Exemption Number ▶

G Website: ▶WWW.BAZELON.ORG

J Organization type (check only one) ▶ ☒ 501(c) (3) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

K Check here ▶ ☐ if the organization's gross receipts are normally not more than $25,000. The organization need not file a return with the IRS; but if the organization received a Form 990 Package in the mail, it should file a return without financial data. **Some states require a complete return.**

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

L Gross receipts: Add lines 6b, 8b, 9b, and 10b to line 12 ▶ 8,167,125.

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances

Revenue	1	Contributions, gifts, grants, and similar amounts received:					
	a	Direct public support		1a	744,366.		
	b	Indirect public support		1b	8,254.		
	c	Government contributions (grants)		1c			
	d	Total (add lines 1a through 1c) (cash $ 650,738. noncash $ 101,882.)				1d	752,620.
	2	Program service revenue including government fees and contracts (from Part VII, line 93)				2	893,989.
	3	Membership dues and assessments				3	
	4	Interest on savings and temporary cash investments				4	190,892.
	5	Dividends and interest from securities				5	
	6 a	Gross rents		6a			
	b	Less: rental expenses		6b			
	c	Net rental income or (loss) (subtract line 6b from line 6a)				6c	
	7	Other investment income (describe ▶)				7	
	8 a	Gross amount from sales of assets other than inventory	(A) Securities: 6,328,596.	8a	(B) Other:		
	b	Less: cost or other basis and sales expenses	6,248,344.	8b	7,435.		
	c	Gain or (loss) (attach schedule)	80,252.	8c	<7,435.>		
	d	Net gain or (loss) (combine line 8c, columns (A) and (B))	STMT 1		STMT 2	8d	72,817.
	9	Special events and activities (attach schedule). If any amount is from **gaming**, check here ▶ ☐					
	a	Gross revenue (not including $ of contributions reported on line 1a)		9a			
	b	Less: direct expenses other than fundraising expenses		9b			
	c	Net income or (loss) from special events (subtract line 9b from line 9a)				9c	
	10 a	Gross sales of inventory, less returns and allowances		10a			
	b	Less: cost of goods sold		10b			
	c	Gross profit or (loss) from sales of inventory (attach schedule) (subtract line 10b from line 10a)				10c	
	11	Other revenue (from Part VII, line 103)				11	1,028.
	12	**Total revenue** (add lines 1d, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11)				12	1,911,346.
Expenses	13	Program services (from line 44, column (B))				13	2,046,265.
	14	Management and general (from line 44, column (C))				14	311,004.
	15	Fundraising (from line 44, column (D))				15	167,651.
	16	Payments to affiliates (attach schedule)				16	
	17	**Total expenses** (add lines 16 and 44, column (A))				17	2,524,920.
Net Assets	18	Excess or (deficit) for the year (subtract line 17 from line 12)				18	<613,574.>
	19	Net assets or fund balances at beginning of year (from line 73, column (A))				19	8,042,395.
	20	Other changes in net assets or fund balances (attach explanation) SEE STATEMENT 3				20	214,937.
	21	Net assets or fund balances at end of year (combine lines 18, 19, and 20)				21	7,643,758.

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323001
12-17-03 LHA **For Paperwork Reduction Act Notice, see the separate instructions.** Form **990** (2003)

06230211 745960 02511 2003.08000 JUDGE DAVID L. BAZELON CENT 02511__1

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JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW 23-7268143

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

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.		(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22 Grants and allocations (attach schedule) cash $ noncash $	22				
23 Specific assistance to individuals (attach schedule)	23				
24 Benefits paid to or for members (attach schedule)	24				
25 Compensation of officers, directors, etc.	25	239,726.	203,019.	22,363.	14,344.
26 Other salaries and wages	26	1,213,000.	1,027,266.	113,157.	72,577.
27 Pension plan contributions	27	66,731.	56,721.	6,156.	3,854.
28 Other employee benefits	28	141,487.	120,262.	13,052.	8,173.
29 Payroll taxes	29	106,363.	90,692.	9,459.	6,212.
30 Professional fundraising fees	30				
31 Accounting fees	31	22,932.	19,655.	1,961.	1,316.
32 Legal fees	32				
33 Supplies	33	22,574.	17,916.	3,272.	1,386.
34 Telephone	34	30,227.	26,160.	1,576.	2,491.
35 Postage and shipping	35	18,597.	12,491.	4,696.	1,410.
36 Occupancy	36	212,847.	187,047.	12,982.	12,818.
37 Equipment rental and maintenance	37	31,110.	25,960.	2,103.	3,047.
38 Printing and publications	38	70,710.	47,385.	17,913.	5,412.
39 Travel	39	52,519.	51,233.	1,195.	91.
40 Conferences, conventions, and meetings	40	39,433.	7,400.	4,087.	27,946.
41 Interest	41				
42 Depreciation, depletion, etc. (attach schedule)	42	28,862.	24,940.	2,401.	1,521.
43 Other expenses not covered above (itemize):					
a	43a				
b	43b				
c	43c				
d	43d				
e SEE STATEMENT 4	43e	227,802.	128,118.	94,631.	5,053.
44 Total functional expenses (add lines 22 through 43) Organizations completing columns (B)-(D), carry these totals to lines 13-15	44	2,524,920.	2,046,265.	311,004.	167,651.

Joint Costs. Check ▶ ☐ if you are following SOP 98-2.

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

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

(iii) the amount allocated to Management and general $ ______ ; and **(iv)** the amount allocated to Fundraising $ ______ .

Part III Statement of Program Service Accomplishments

What is the organization's primary exempt purpose? ▶ SEE STATEMENT 5

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

	Program Service Expenses (Required for 501(c)(3) and (4) orgs , and 4947(a)(1) trusts, but optional for others)
a COMMUNITY MEMBERSHIP: FOR ALL PROGRAM DESCRIPTIONS SEE ATTACHED (Grants and allocations $)	1,109,046.
b SELF-DETERMINATION AND CHOICE: (Grants and allocations $)	252,778.
c ENDING PUNISHMENT OF CONSUMERS FOR SYSTEMIC FAILURES: (Grants and allocations $)	449,635.
d PRESERVING PROTECTIONS AND ENTITLEMENTS: (Grants and allocations $)	211,260.
e Other program services (attach schedule) STATEMENT 6 (Grants and allocations $)	23,546.
f Total of Program Service Expenses (should equal line 44, column (B), Program services) ▶	2,046,265.

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Part IV Balance Sheets

Note: *Where required, attached schedules and amounts within the description column should be for end-of-year amounts only.*			(A) Beginning of year		(B) End of year
Assets					
45 Cash - non-interest-bearing			500.	45	500.
46 Savings and temporary cash investments			614,833.	46	310,762.
47 a Accounts receivable	47a	166,250.			
b Less: allowance for doubtful accounts	47b		343,467.	47c	166,250.
48 a Pledges receivable	48a				
b Less: allowance for doubtful accounts	48b			48c	
49 Grants receivable			876,336.	49	49,801.
50 Receivables from officers, directors, trustees, and key employees				50	
51 a Other notes and loans receivable	51a				
b Less: allowance for doubtful accounts	51b			51c	
52 Inventories for sale or use				52	
53 Prepaid expenses and deferred charges			36,408.	53	39,976.
54 Investments - securities STMT 7 ▶ ☐ Cost ☒ FMV			6,238,366.	54	7,095,956.
55 a Investments - land, buildings, and equipment: basis	55a				
b Less: accumulated depreciation	55b			55c	
56 Investments - other				56	
57 a Land, buildings, and equipment: basis	57a	337,509.			
b Less: accumulated depreciation STMT 8	57b	275,229.	72,582.	57c	62,280.
58 Other assets (describe ▶)				58	
59 **Total assets** (add lines 45 through 58) (must equal line 74)			8,182,492.	59	7,725,525.
Liabilities					
60 Accounts payable and accrued expenses			103,937.	60	49,434.
61 Grants payable				61	
62 Deferred revenue				62	
63 Loans from officers, directors, trustees, and key employees				63	
64 a Tax-exempt bond liabilities				64a	
b Mortgages and other notes payable				64b	
65 Other liabilities (describe ▶ DEFERRED RENT ABATEMENT)			36,160.	65	32,333.
66 **Total liabilities** (add lines 60 through 65)			140,097.	66	81,767.
Net Assets or Fund Balances					
Organizations that follow SFAS 117, check here ▶ ☒ and complete lines 67 through 69 and lines 73 and 74.					
67 Unrestricted			2,987,204.	67	3,301,704.
68 Temporarily restricted			1,055,191.	68	342,054.
69 Permanently restricted			4,000,000.	69	4,000,000.
Organizations that do not follow SFAS 117, check here ▶ ☐ and complete lines 70 through 74.					
70 Capital stock, trust principal, or current funds				70	
71 Paid-in or capital surplus, or land, building, and equipment fund				71	
72 Retained earnings, endowment, accumulated income, or other funds				72	
73 **Total net assets or fund balances** (add lines 67 through 69 **or** lines 70 through 72; column (A) **must** equal line 19; column (B) **must** equal line 21)			8,042,395.	73	7,643,758.
74 **Total liabilities and net assets / fund balances** (add lines 66 and 73)			8,182,492.	74	7,725,525.

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

Part IV-A Reconciliation of Revenue per Audited Financial Statements with Revenue per Return

a	Total revenue, gains, and other support per audited financial statements		a	2,141,296.
b	Amounts included on line a but not on line 12, Form 990:			
(1)	Net unrealized gains on investments	$ 214,937.		
(2)	Donated services and use of facilities	$ 7,578.		
(3)	Recoveries of prior year grants	$		
(4)	Other (specify):	$		
	Add amounts on lines (1) through (4)		b	222,515.
c	Line a minus line b		c	1,918,781.
d	Amounts included on line 12, Form 990 but not on line a:			
(1)	Investment expenses not included on line 6b, Form 990	$		
(2)	Other (specify): STMT 10	$ <7,435.>		
	Add amounts on lines (1) and (2)		d	<7,435.>
e	Total revenue per line 12, Form 990 (line c plus line d)		e	1,911,346.

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

a	Total expenses and losses per audited financial statements		a	2,539,933.
b	Amounts included on line a but not on line 17, Form 990:			
(1)	Donated services and use of facilities	$ 7,578.		
(2)	Prior year adjustments reported on line 20, Form 990	$		
(3)	Losses reported on line 20, Form 990	$		
(4)	Other (specify): STMT 9	$ 7,435.		
	Add amounts on lines (1) through (4)		b	15,013.
c	Line a minus line b		c	2,524,920.
d	Amounts included on line 17, Form 990 but not on line a:			
(1)	Investment expenses not included on line 6b, Form 990	$		
(2)	Other (specify):	$		
	Add amounts on lines (1) and (2)		d	0.
e	Total expenses per line 17, Form 990 (line c plus line d)		e	2,524,920.

Part V List of Officers, Directors, Trustees, and Key Employees (List each one even if not compensated.)

(A) Name and address	(B) Title and average hours per week devoted to position	(C) Compensation (If not paid, enter -0-.)	(D) Contributions to employee benefit plans & deferred compensation	(E) Expense account and other allowances
SEE STATEMENT 11		239,726.	35,653.	0.

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

Part VI Other Information

				Yes	No
76	Did the organization engage in any activity not previously reported to the IRS? If "Yes," attach a detailed description of each activity		76		X
77	Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes.		77		X
78 a	Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return?		78a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	N/A	78b		
79	Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement		79		X
80 a	Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?		80a		X
b	If "Yes," enter the name of the organization ▶ ______ and check whether it is ☐ exempt **or** ☐ nonexempt.				
81 a	Enter direct or indirect political expenditures. See line 81 instructions	81a 0.			
b	Did the organization file **Form 1120-POL** for this year?		81b		X
82 a	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?		82a	X	
b	If "Yes," you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions in Part III.)	82b 7,578.			
83 a	Did the organization comply with the public inspection requirements for returns and exemption applications?		83a	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?		83b	X	
84 a	Did the organization solicit any contributions or gifts that were not tax deductible?		84a		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	N/A	84b		
85	*501(c)(4), (5), or (6) organizations.* **a** Were substantially all dues nondeductible by members?	N/A	85a		
b	Did the organization make only in-house lobbying expenditures of $2,000 or less?	N/A	85b		
	If "Yes" was answered to either 85a or 85b, **do not** complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.				
c	Dues, assessments, and similar amounts from members	85c N/A			
d	Section 162(e) lobbying and political expenditures	85d N/A			
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices	85e N/A			
f	Taxable amount of lobbying and political expenditures (line 85d less 85e)	85f N/A			
g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?	N/A	85g		
h	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?	N/A	85h		
86	*501(c)(7) organizations.* Enter: **a** Initiation fees and capital contributions included on line 12	86a N/A			
b	Gross receipts, included on line 12, for public use of club facilities	86b N/A			
87	*501(c)(12) organizations* Enter: **a** Gross income from members or shareholders	87a N/A			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	87b N/A			
88	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Part IX		88		X
89 a	*501(c)(3) organizations.* Enter: Amount of tax imposed on the organization during the year under: section 4911 ▶ 0. ; section 4912 ▶ 0. ; section 4955 ▶ 0.				
b	*501(c)(3) and 501(c)(4) organizations* Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction		89b		X
c	Enter: Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958	▶ 0.			
d	Enter: Amount of tax on line 89c, above, reimbursed by the organization	▶ 0.			

90 a List the states with which a copy of this return is filed ▶ DC, NY

b Number of employees employed in the pay period that includes March 12, 2003 | 90b | 24

91 The books are in care of ▶ ORGANIZATION Telephone no. ▶ SEE PAGE 1

Located at ▶ SEE PAGE 1 ZIP + 4 ▶ SEE PAGE 1

92 *Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of* **Form 1041**- Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the tax year ▶ | 92 | N/A

Part VII **Analysis of Income-Producing Activities** (See page 33 of the instructions.)

Note: *Enter gross amounts unless otherwise indicated.*	Unrelated business income		Excluded by section 512, 513, or 514		
93 Program service revenue:	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	(E) Related or exempt function income
a CONTRACTS					446,640.
b ATTORNEY FEES					423,256.
c PUBLICATION					24,093.
d					
e					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	190,892.	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate:					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory			18	72,817.	
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					
103 Other revenue:					
a MISCELLANEOUS					1,028.
b					
c					
d					
e					
104 Subtotal (add columns (B), (D), and (E))		0.		263,709.	895,017.

105 **Total** (add line 104, columns (B), (D), and (E)) ▶ 1,158,726.

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

Part VIII **Relationship of Activities to the Accomplishment of Exempt Purposes** (See page 34 of the instructions.)

Line No. ▼	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes).
	SEE STATEMENT 12

Part IX **Information Regarding Taxable Subsidiaries and Disregarded Entities** (See page 34 of the instructions.)

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

Part X **Information Regarding Transfers Associated with Personal Benefit Contracts** (See page 34 of the instructions.)

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

(b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

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

[redacted] ompanying schedules and statements, and to the best of my knowledge and belief, it is true,
nformation of which preparer has any knowledge
-14-05 ▶ Robert Bernstein, Exec. Director
te Type or print name and title.
Date / Check if self Preparer's SSN or PTIN
[redacted]

SCHEDULE A (Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

Organization Exempt Under Section 501(c)(3)

(Except Private Foundation) and Section 501(e), 501(f), 501(k), 501(n), or Section 4947(a)(1) Nonexempt Charitable Trust

Supplementary Information-(See separate instructions.)

▶ MUST be completed by the above organizations and attached to their Form 990 or 990-EZ

OMB No 1545-0047

2003

Name of the organization: JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW

Employer identification number: 23 7268143

Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees

(See page 1 of the instructions. List each one. If there are none, enter "None.")

(a) Name and address of each employee paid more than $50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans & deferred compensation	(e) Expense account and other allowances
IRA BURNIM ALL MAY BE REACHED IN C/O THE ORG.	LEGAL DIR. 37.5	112,363.	13,189.	0.
CHRIS KOYANAGI	POLICY DIR. 37.5	112,363.	13,272.	0.
MICHAEL ALLEN	SR STAFF ATTY 37.5	93,784.	21,153.	0.
JANET KING	CONTROLLER 37.5	82,091.	11,392.	0.
JENNIFER MATHIS	SR STAFF ATTY 37.5	74,544.	10,962.	0.
Total number of other employees paid over $50,000 ▶	7			

Part II Compensation of the Five Highest Paid Independent Contractors for Professional Services

(See page 2 of the instructions. List each one (whether individuals or firms). If there are none, enter "None.")

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

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

			Yes	No
1	During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities ▶ $ ______ $ 23,546. (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B.)	1	X	
	Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A. Other organizations checking "Yes," must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities.			
2	During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary? *(If the answer to any question is "Yes," attach a detailed statement explaining the transactions.)*			
a	Sale, exchange, or leasing of property?	2a		X
b	Lending of money or other extension of credit?	2b		X
c	Furnishing of goods, services, or facilities?	2c		X
d	Payment of compensation (or payment or reimbursement of expenses if more than $1,000)? SEE PART V, FORM 990	2d	X	
e	Transfer of any part of its income or assets?	2e		X
3 a	Do you make grants for scholarships, fellowships, student loans, etc.? (If "Yes," attach an explanation of how you determine that recipients qualify to receive payments.)	3a		X
b	Do you have a section 403(b) annuity plan for your employees?	3b		X
4	Did you maintain any separate account for participating donors where donors have the right to provide advice on the use or distribution of funds?	4		X

Part IV Reason for Non-Private Foundation Status (See pages 3 through 6 of the instructions.)

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

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

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

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

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

9 ☐ A medical research organization operated in conjunction with a hospital. Section 170(b)(1)(A)(iii). **Enter the hospital's name, city, and state** ▶ ______

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

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

11b ☐ A community trust. Section 170(b)(1)(A)(vi). (Also complete the **Support Schedule** in Part IV-A.)

12 ☐ An organization that normally receives: **(1) more than 33 1/3%** of its support from contributions, membership fees, and gross receipts from activities related to its charitable, etc., functions - subject to certain exceptions, and **(2) no more than 33 1/3%** of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Also complete the **Support Schedule** in Part IV-A.)

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

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

(a) Name(s) of supported organization(s)	**(b)** Line number from above

14 ☐ An organization organized and operated to test for public safety. Section 509(a)(4). (See page 6 of the instructions.)

Part IV-A **Support Schedule** (Complete only if you checked a box on line 10, 11, or 12.) **Use cash method of accounting.**
Note: *You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting.*

Calendar year (or fiscal year beginning in) ▶	(a) 2002	(b) 2001	(c) 2000	(d) 1999	(e) Total
15 Gifts, grants, and contributions received. (Do not include unusual grants. See line 28.)	1,633,429.	4,168,370.	2,963,005.	1,305,221.	10,070,025.
16 Membership fees received					
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to the organization's charitable, etc., purpose	573,979.	934,256.	3,301,549.	441,564.	5,251,348.
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975	166,628.	123,284.	131,291.	81,447.	502,650.
19 Net income from unrelated business activities not included in line 18					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
21 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge					
22 Other income. Attach a schedule. Do not include gain or (loss) from sale of capital assets	1,592.		SEE STATEMENT 13 2,775.	210.	4,577.
23 Total of lines 15 through 22	2,375,628.	5,225,910.	6,398,620.	1,828,442.	15,828,600.
24 Line 23 minus line 17	1,801,649.	4,291,654.	3,097,071.	1,386,878.	10,577,252.
25 Enter 1% of line 23	23,756.	52,259.	63,986.	18,284.	

26 **Organizations described on lines 10 or 11:** a Enter 2% of amount in column (e), line 24 ▶ 26a 211,545.

b Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 1999 through 2002 exceeded the amount shown in line 26a. **Do not file this list with your return.** Enter the total of all these excess amounts ▶ 26b 6,905,320.

c Total support for section 509(a)(1) test: Enter line 24, column (e) ▶ 26c 10,577,252.

d Add: Amounts from column (e) for lines: 18 502,650. 19 ______ 22 4,577. 26b 6,905,320. ▶ 26d 7,412,547.

e Public support (line 26c minus line 26d total) ▶ 26e 3,164,705.

f **Public support percentage (line 26e (numerator) divided by line 26c (denominator))** ▶ 26f 29.9199%

27 **Organizations described on line 12:** a For amounts included in lines 15, 16, and 17 that were received from a "disqualified person," prepare a list for your records to show the name of, and total amounts received in each year from, each "disqualified person." **Do not file this list with your return.** Enter the sum of such amounts for each year: N/A

(2002) (2001) (2000) (1999)

b For any amount included in line 17 that was received from each person (other than "disqualified persons"), prepare a list for your records to show the name of, and amount received for each year, that was more than the **larger** of **(1)** the amount on line 25 for the year or **(2)** $5,000. (Include in the list organizations described in lines 5 through 11, as well as individuals.) **Do not file this list with your return** After computing the difference between the amount received and the larger amount described in **(1)** or **(2)**, enter the sum of these differences (the excess amounts) for each year: N/A

(2002) (2001) (2000) (1999)

c Add: Amounts from column (e) for lines: 15 ______ 16 ______ 17 ______ 20 ______ 21 ______ ▶ 27c N/A

d Add: Line 27a total ______ and line 27b total ______ ▶ 27d N/A

e Public support (line 27c total minus line 27d total) ▶ 27e N/A

f Total support for section 509(a)(2) test: Enter amount on line 23, column (e) ▶ 27f N/A

g **Public support percentage (line 27e (numerator) divided by line 27f (denominator))** ▶ 27g N/A %

h **Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))** ▶ 27h N/A %

28 **Unusual Grants:** For an organization described in line 10, 11, or 12 that received any unusual grants during 1999 through 2002, prepare a list for your records to show, for each year, the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant. **Do not file this list with your return.** Do not include these grants in line 15.

NONE

Part V Private School Questionnaire (See page 7 of the instructions.) N/A

(To be completed ONLY by schools that checked the box on line 6 in Part IV)

			Yes	No
29	Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	29		
30	Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	30		
31	Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves?	31		
	If "Yes," please describe; if "No," please explain. (If you need more space, attach a separate statement.)			
32	Does the organization maintain the following:			
a	Records indicating the racial composition of the student body, faculty, and administrative staff?	32a		
b	Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	32b		
c	Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	32c		
d	Copies of all material used by the organization or on its behalf to solicit contributions?	32d		
	If you answered "No" to any of the above, please explain. (If you need more space, attach a separate statement.)			
33	Does the organization discriminate by race in any way with respect to:			
a	Students' rights or privileges?	33a		
b	Admissions policies?	33b		
c	Employment of faculty or administrative staff?	33c		
d	Scholarships or other financial assistance?	33d		
e	Educational policies?	33e		
f	Use of facilities?	33f		
g	Athletic programs?	33g		
h	Other extracurricular activities?	33h		
	If you answered "Yes" to any of the above, please explain. (If you need more space, attach a separate statement.)			
34 a	Does the organization receive any financial aid or assistance from a governmental agency?	34a		
b	Has the organization's right to such aid ever been revoked or suspended?	34b		
	If you answered "Yes" to either 34a or b, please explain using an attached statement.			
35	Does the organization certify that it has complied with the applicable requirements of sections 4.01 through 4.05 of Rev. Proc. 75-50, 1975-2 C.B. 587, covering racial nondiscrimination? If "No," attach an explanation	35		

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

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

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Affiliated group totals	(b) To be completed for ALL electing organizations
		N/A	
36 Total lobbying expenditures to influence public opinion (grassroots lobbying)	36		14,502.
37 Total lobbying expenditures to influence a legislative body (direct lobbying)	37		9,044.
38 Total lobbying expenditures (add lines 36 and 37)	38		23,546.
39 Other exempt purpose expenditures	39		2,508,809.
40 Total exempt purpose expenditures (add lines 38 and 39)	40		2,532,355.
41 Lobbying nontaxable amount. Enter the amount from the following table -	41		276,618.
42 Grassroots nontaxable amount (enter 25% of line 41)	42		69,155.
43 Subtract line 42 from line 36. Enter -0- if line 42 is more than line 36	43		0.
44 Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38	44		0.

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

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

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

	Lobbying Expenditures During 4-Year Averaging Period				
Calendar year (or fiscal year beginning in) ▶	(a) 2003	(b) 2002	(c) 2001	(d) 2000	(e) Total
45 Lobbying nontaxable amount	276,618.	277,734.	306,226.	265,389.	1,125,967.
46 Lobbying ceiling amount (150% of line 45(e))					1,688,951.
47 Total lobbying expenditures	23,546.	34,379.	40,204.	24,719.	122,848.
48 Grassroots nontaxable amount	69,155.	69,434.	76,557.	66,347.	281,493.
49 Grassroots ceiling amount (150% of line 48(e))					422,240.
50 Grassroots lobbying expenditures	14,502.	16,572.	12,950.	8,633.	52,657.

Part VI-B **Lobbying Activity by Nonelecting Public Charities**
(For reporting only by organizations that did not complete Part VI-A) (See page 12 of the instructions.) N/A

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

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

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

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

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

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

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

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

b If "Yes," complete the following schedule: N/A

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

2003 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 2 990

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Amount Of Depreciation
1	FURNITURE AND EQUIPMENT	VARIES	SL	7.00	16	257,350.			257,350.	183,802.		21,440.
2	LAW LIBRARY	VARIES	SL	7.00	16	70,395.			70,395.	56,279.		3,944.
3	LEASEHOLD IMPROVEMENTS	VARIES	SL	7.00	16	9,764.			9,764.	6,286.		3,478.
4	(D)DISPOSITION OF FIXED ASSETS	VARIES	SL	7.00	16	20,257.			20,257.	12,822.		0.
	* TOTAL 990 PAGE 2 DEPR					357,766.		0.	357,766.	259,189.	0.	28,862.

328102
05-01-03

(D) - Asset disposed

* ITC, Section 179, Salvage, HR 3090, Commercial Revitalization Deduction

FORM 990 GAIN (LOSS) FROM PUBLICLY TRADED SECURITIES STATEMENT 1

DESCRIPTION	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	NET GAIN OR (LOSS)
SALE OF MARKETABLE SECURITIES	6,328,596.	6,248,344.	0.	80,252.
TO FORM 990, PART I, LINE 8	6,328,596.	6,248,344.	0.	80,252.

FORM 990 GAIN (LOSS) FROM SALE OF OTHER ASSETS STATEMENT 2

DESCRIPTION	DATE ACQUIRED	DATE SOLD	METHOD ACQUIRED
DISPOSITION OF FIXED ASSETS	VARIOUS	VARIOUS	PURCHASED

NAME OF BUYER	GROSS SALES PRICE	COST OR OTHER BASIS	EXPENSE OF SALE	DEPREC	NET GAIN OR (LOSS)
	0.	20,257.	0.	12,822.	<7,435.>
TO FM 990, PART I, LN 8		20,257.	0.	12,822.	<7,435.>

FORM 990 OTHER CHANGES IN NET ASSETS OR FUND BALANCES STATEMENT 3

DESCRIPTION	AMOUNT
UNREALIZED GAIN ON INVESTMENTS	214,937.
TOTAL TO FORM 990, PART I, LINE 20	214,937.

FORM 990 OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) TOTAL	(B) PROGRAM SERVICES	(C) MANAGEMENT AND GENERAL	(D) FUNDRAISING
CONSULTING FEES	50,683.	34,349.	16,334.	
COURT COSTS AND DESPOSITIONS	87.	87.		
DUES AND FEES	83,409.	25,971.	54,717.	2,721.
INSURANCE	30,864.	11,645.	18,356.	863.
MISCELLANEOUS	13,978.	12,863.	613.	502.
SUBCONTRACTS	13,046.	13,046.		
TEMPORARY HELP	21,934.	19,051.	2,883.	
TRAINING	399.	399.		
TRUSTEE EXPENSES	13,402.	10,707.	1,728.	967.
TOTAL TO FM 990, LN 43	227,802.	128,118.	94,631.	5,053.

FORM 990 STATEMENT OF ORGANIZATION'S PRIMARY EXEMPT PURPOSE PART III STATEMENT 5

EXPLANATION

THE MISSION OF THE JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW IS TO PROTECT AND ADVANCE THE RIGHTS OF ADULTS AND CHILDREN WHO HAVE MENTAL DISABILITIES. THE CENTER ENVISIONS AN AMERICA WHERE PEOPLE WHO HAVE MENTAL ILLNESSES OR DEVELOPMENTAL DISABILITIES EXERCISE THEIR OWN LIFE CHOICES AND HAVE ACCESS TO THE RESOURCES THAT ENABLE THEM TO PARTICIPATE FULLY IN THEIR COMMUNITIES.

FORM 990 OTHER PROGRAM SERVICES STATEMENT 6

DESCRIPTION	GRANTS AND ALLOCATIONS	EXPENSES
DIRECT LOBBYING		9,044.
GRASSROOTS LOBBYING		14,502.
TOTAL TO FORM 990, PART III, LINE E		23,546.

FORM 990 NON-GOVERNMENT SECURITIES STATEMENT 7

SECURITY DESCRIPTION	CORPORATE STOCKS	CORPORATE BONDS	OTHER PUBLICLY TRADED SECURITIES	OTHER SECURITIES	TOTAL NON-GOV'T SECURITIES
STOCKS	3,392,157.				3,392,157.
CORPORATE BONDS		2,552,282.			2,552,282.
MONEY MARKET FUNDS				944,085.	944,085.
MUTUAL FUNDS			207,432.		207,432.
TO 990, LN 54 COL B	3,392,157.	2,552,282.	207,432.	944,085.	7,095,956.

FORM 990 DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE AND EQUIPMENT	257,350.	205,242.	52,108.
LAW LIBRARY	70,395.	60,223.	10,172.
LEASEHOLD IMPROVEMENTS	9,764.	9,764.	0.
TOTAL TO FORM 990, PART IV, LN 57	337,509.	275,229.	62,280.

FORM 990 OTHER EXPENSES NOT INCLUDED ON FORM 990 STATEMENT 9

DESCRIPTION	AMOUNT
LOSS ON DISPOSITION OF FIXED ASSETS	7,435.
TOTAL TO FORM 990, PART IV-B	7,435.

FORM 990 OTHER REVENUE INCLUDED ON FORM 990 STATEMENT 10

DESCRIPTION	AMOUNT
LOSS ON DISPOSITION OF FIXED ASSETS	<7,435.>
TOTAL TO FORM 990, PART IV-A	<7,435.>

FORM 990 PART V - LIST OF OFFICERS, DIRECTORS, TRUSTEES AND KEY EMPLOYEES STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ROBERT BERNSTEIN ALL BOARD MEMBERS CAN BE REACHED IN C/O ORGANIZATION ADDRESS	PRESIDENT & EXEC. DIRECTOR 37.5	141,814.	20,039.	0.
LEE CARTY	SECRETARY & DIR. OF COMMUN 37.5	97,912.	15,614.	0.
H. RUTHERFORD TURNBULL, III COMPENSATED BOARD MEMBERS	BOARD CHAIR 30	0.	0.	0.
HARVEY ROSENTHAL	BOARD EXEC. COMMITTEE 5	0.	0.	0.
C. LYONEL JONES	BOARD EXEC. COMMITTEE 30	0.	0.	0.
NIKKI HEIDEPRIEM	BOARD EXEC. COMMITTEE 5	0.	0.	0.
HOWARD GOLDMAN	BOARD EXEC. COMMITTEE 30	0.	0.	0.
ROBERT A. BURT	BOARD EXEC. COMMITTEE 15	0.	0.	0.
STEPHEN J. MORSE	TRUSTEE 5	0.	0.	0.
ELLIOT F. GERSON	TRUSTEE 5	0.	0.	0.
RONALD H. WEICH	TRUSTEE 15	0.	0.	0.

CYNTHIA M. SINGER	TRUSTEE 15	0.	0.	0.
MIRIAM BAZELON KNOX	HONORARY TRUSTEE 15	0.	0.	0.
MARY JANE ENGLAND	TRUSTEE EMERITA 15	0.	0.	0.
SALLY ZINMAN	TRUSTEE 5	0.	0.	0.
W. ALLEN SCHAFFER	TRUSTEE 5	0.	0.	0.
RUTH LUCKASSON	TRUSTEE 5	0.	0.	0.
KENNETH R. FEINBERG	TRUSTEE 5	0.	0.	0.
EILEEN A. BAZELON	TRUSTEE 5	0.	0.	0.
JOSEPH G. PERPICH	TRUSTEE 15	0.	0.	0.
JACQUELINE DRAFOOS	TRUSTEE 15	0.	0.	0.
DAVID APATOFF	TRUSTEE 20	0.	0.	0.
ANITA L. ALLEN-CASTELLITTO	TRUSTEE 15	0.	0.	0.
MARTHA MINOW	TRUSTEE 5	0.	0.	0.
TOTALS INCLUDED ON FORM 990, PART V		239,726.	35,653.	0.

FORM 990 PART VIII - RELATIONSHIP OF ACTIVITIES TO ACCOMPLISHMENT OF EXEMPT PURPOSES STATEMENT 12

LINE	EXPLANATION OF RELATIONSHIP OF ACTIVITIES
93A	CONTRACT REVENUE IS RECEIVED FROM VARIOUS ACTIVITIES THAT ARE ENGAGED DIRECTLY IN FURTHERANCE OF THE CENTER'S EXEMPT PURPOSE.
93B	COURT-AWARDED ATTORNEY FEES SUPPORT FEES SUPPORT LITIGATION TO ESTABLISH AND PROTECT THE RIGHTS OF PEOPLE WITH DISABILITIES.
93C	PUBLICATIONS PROVIDE INFORMATION TO THE GENERAL PUBLIC WHICH IS BENEFICIAL TO THE CENTER'S EXEMPT PURPOSES. INCOME FROM THE SALES MAY BE USED TO CONCEPTUALIZE AND DEVELOP NEW PUBLICATIONS THAT ARE NOT FUNDED OR ARE INSUFFICIENTLY FUNDED BY RESTRICTED GRANTS OR CONTRACTS.
103A	MISCELLANEOUS INCOME RECEIVED FROM ACTIVITIES ENGAGED DIRECTLY IN FURTHERANCE OF THE CENTER'S EXEMPT PURPOSE.

SCHEDULE A OTHER INCOME STATEMENT 13

DESCRIPTION	2002 AMOUNT	2001 AMOUNT	2000 AMOUNT	1999 AMOUNT
MISCELLANEOUS	1,592.	0.	2,775.	210.
TOTAL TO SCHEDULE A, LINE 22	1,592.	0.	2,775.	210.

Judge David L. Bazelon Center for Mental Health Law
23-726814
2004 Form 990
Statement of Program Services Accomplishments

Community Membership: This program seeks to create systems of community-based care for adults and children at risk of institutional or foster-care placement, increased Medicaid and private insurance coverage of mental health care, and prevent housing discrimination based on disability. The Bazelon Center challenges unnecessary institutionalization and seeks appropriate services in the community for adults and older adults through a class action, *Davis v. California*, challenging the allocation of funds for construction of a 1,200-bed nursing home, for children in the child welfare system, in *Katie A. v. Los Angeles County Department of Child and Family Services*, and for individuals with developmental disabilities in Montana, in *Travis D. v. Eastmont Human Services Center*. In various publications the Bazelon Center has disseminated its analyses of federal and state laws and regulations governing access to needed services and supports in the community; these include *Recovery in the Community*, describing states' use of the Medicaid rehabilitation option and published by the Bazelon Center; an analysis of Medicaid spending on mental health care prepared for the National Association of Mental Health Planning and Advisory Councils; a consumer guide to the Health Insurance Portability, Afford ability and Accountability Act (HIPAA) for publication by the Center on Mental Health Services; *Disintegrating Systems*, highlighting findings by state commissions and task forces for state mental health advocates; and *A New Vision of Public Mental Health*, which includes a model law designed to stimulate discussion of state-level mental health system reform. The Bazelon Center also contracted with the Baltimore City Housing Authority to assess compliance with federal fair housing laws and filed an administrative complaint against the federal Department of Housing and Urban Development for failure to safeguard the rights of people with disabilities in federally subsidized housing.

Self-Determination and Choice: The goal of this program is to enable people with mental disabilities to be independent, free from coercion and invasion of privacy and able to exercise meaningful choice. Economic independence is critical to self-determination. The Bazelon Center successfully represented an attorney with a history of paranoid schizophrenia in overturning the denial of admission to the New York bar despite his having passed the bar exam and worked as a volunteer with the Legal Aid Society, and having been symptom-free for nine years. Through its program for access to palliative care, the Bazelon Center has assisted local lawyers in challenges to doctors and facilities that have withheld end-of-life pain medication and is analyzing potential improvements in federal regulations to improve access to hospice services. We continued promoting our model psychiatric advance directive (www.bazelon.org/advdir.html) and provided technical assistance to state policymakers and consumer groups in interpreting existing state laws on healthcare directives or drafting new legislation. The Bazelon Center is working with pro bono counsel seeking to uphold on appeal a favorable Vermont decision, *Hargrave v. Vermont*, finding that the state violated the Americans with Disabilities Act by giving less effect to advance directives for mental health care than to advance directives for physical health care.

Ending Punishment of Consumers for Systemic Failures: This program addresses victimization resulting from neglectful public systems, such as the increasing dilemma of parents' having to relinquish custody to obtain mental health care for a child. The Bazelon Center has followed up on its groundbreaking report, *Relinquishing Custody: The Tragic Result of Failure to Meet Children's Mental Health Needs*, by assisting state advocates' and legislators' efforts to address the issue with policy changes and providing information to the General Accounting Office for its report on the problem. Another type of punishment for the lack of services is the growing criminalization of people with mental illnesses. The Bazelon Center prepared a set of fact sheets on the issue, posted on its website, and participated actively on the steering committee of a project headed by the Council on State Governments to produce a major resource document on how to help people with serious mental illnesses out of the criminal justice system. Seeking to mandate improved training of police officers about mental illness, the Center brought a lawsuit, *Phalp v. City of Overland Park*, seeking damages for the family of a girl who was killed after police dismissed her pleas for help and questioned her credibility because she had bipolar disorder. The Center also reviewed the 20 extant mental health courts for an analysis of their operation and provided training and technical assistance to mental health advocates and representatives of the criminal justice sector in several states.

Preserving Protections and Entitlements: This program seeks to preserve civil rights protections for people with mental disabilities, such as the Americans with Disabilities Act (ADA) and Fair Housing Act, and to maintain entitlements such as federal disability benefits and Medicaid-covered rehabilitation services. In consultation with mental health professionals and consumers, the Bazelon Center prepared, disseminated and posted on its website materials to assist attorneys and advocates in interpreting Supreme Court decisions on employment rights under the ADA. The Center managed the Supreme Court appeal in *Chevron v. Echazabal*, raising the issue of whether an employer may deny a job to someone out of a paternalistic concern for the individual, coordinating amicus briefs and assisting the attorney for the respondent, and continued to monitor ADA cases in the lower courts and provide consultation for plaintiffs' attorneys. Seeking to improve states' use of Medicaid options to cover children in families whose income is too high for regular Medicaid coverage, the Center completed the first study ever done of the TEFRA (Katie Beckett) option and the home- and community-based services waiver, both of which permit coverage of children who, but for the community services covered, would be institutionalized. A detailed report was completed for the Center for Mental Health Services and the Bazelon Center began preparation of a family advocates' guide to the option and waiver.

Exempt Purpose: The Bazelon Center protects the legal rights of adults and children with mental disabilities and works to improve their access to appropriate health and mental health care, treatment, education, housing, employment and other services and supports that will enable them to participate fully in community life. Activities include precedent-setting litigation; training and technical assistance for local attorneys, family and consumer groups and other advocates; policy research; dissemination of information via mail and electronically for policymakers and advocates; and publications, including an extensive website.

JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW
EIN 23-7268143

FORM 990 – FOR THE YEAR ENDED SEPTEMBER 30, 2004

SCHEDULE A, PART IV-A – Line 26f: PUBLIC SUPPORT

The Center qualifies as a public charity under the "facts and circumstances" test of 1.170A-9(e)(3) of the Treasury Regulations, based upon the following:

1. Its support, as reported for FY04, is 29.92%, well in excess of the 10% level required by §1.170A-9(e)(3)(i).

2. The Center is organized and operated so as to attract new and additional public and governmental funding on a continuous basis, thereby meeting the requirement of §1.170A-9(e)(3)(ii). Support is, in fact, received from a variety of Foundations and other public sources. Failure of the normal 33 1/3% public support test, under Code §509(a)(1) and Reg. §1.170(b)(1)(A)(vi), is attributable to one large grant, in one year, from a single donor. The Center otherwise continues to seek and receive support from a variety of donors.

3. The Center's public support, at 29.92%, is well above the 10% minimum required for the "facts and circumstances" test, thereby meeting the requirement of §1.170A-9(e)(3)(ii).

4. In meeting the requirement of §1.170A-9(e)(3)(i), the Center has received support from a representative number of persons, rather than receiving all or most of its support from the members of a single family, or from a single donor. In this respect, the Center meets the requirement of §1.170A-9(e)(3)(iv)

5. The Center's Board includes members representing broad public interests within its governance. The Board is racially, economically and geographically diverse and is composed of legal experts, healthcare professionals, parents of children with mental disabilities and individuals who have mental disabilities, thereby representing a cross-section of people concerned about mental disabilities. In this manner, the Center meets the requirement of §1.170A-9(e)(3)(v).

6. The Center conducts activities that benefit the public in general. The Center produces publications to educate policymakers, mental health consumers and the general public about issues affecting the community integration of people with mental disabilities. Many of these are promulgated at no charge to various stakeholder groups and many are available without charge on-line through a website maintained by the Center. In addition, the Center periodically issues bulletins about emerging issues in mental health policy and makes these available in hard copy or electronically to any interested party without charge. In this manner, the Center meets the requirement of §1.170A-9(e)(3)(vi).

Form **8868** (December 2000)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (not automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Note: Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time - Only submit original (no copies needed)

Note: Form 990-T corporations *requesting an automatic 6-month extension - check this box and complete Part I only* ▶ [ ]

All other corporations (including Form 990-C filers) must use Form 7004 to request an extension of time to file income tax returns. Partnerships, REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066, or 1041.

Type or print	Name of Exempt Organization	Employer identification number
File by the due date for filing your return See instructions.	JUDGE DAVID L. BAZELON CENTER FOR MENTAL HEALTH LAW	23-7268143
	Number, street, and room or suite no. If a P.O. box, see instructions. 1101 15TH STREET, N.W., NO. 1212	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. WASHINGTON, DC 20005	

Check type of return to be filed(file a separate application for each return):

[X] Form 990	[ ] Form 990-T (corporation)	[ ] Form 4720
[ ] Form 990-BL	[ ] Form 990-T (sec. 401(a) or 408(a) trust)	[ ] Form 5227
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 6069
[ ] Form 990-PF	[ ] Form 1041-A	[ ] Form 8870

- If the organization does **not** have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a **Group Return,** enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ [ ] . If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6-month, for **990-T corporation**) extension of time until MAY 16, 2005 .
to file the exempt organization return for the organization named above The extension is for the organization's return for:
▶ [ ] calendar year ______ or
▶ [X] tax year beginning OCT 1, 2003 , and ending SEP 30, 2004 .

2 If this tax year is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions . . . $ ______

b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit . . . $ ______

c **Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions . . . $ N/A

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶ [signature] Title ▶ CPA Date ▶ 2/1/05

LHA **For Paperwork Reduction Act Notice, see instruction** Form **8868** (12-2000)

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