**Part I: Summary**

### Activities & Governance

1. Briefly describe the organization’s mission or most significant activities: Founded in 1924, United Way of Northeast Florida, Inc. (“United Way”) has earned a reputation as a respected and efficient philanthropic organization. United Way envisions a... *(Continued on Schedule O)*

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

### Number of voting members of the governing body (Part VI, line 1a)

3. Number of voting members of the governing body (Part VI, line 1a)...

4. Number of independent voting members of the governing body (Part VI, line 1b)...

5. Total number of volunteers (estimate if necessary)...

6. Total number of individuals employed in calendar year 2018 (Part V, line 2a)...

7a. Total unrelated business revenue from Part VIII, column (C), line 12...

7b. Net unrelated business taxable income from Form 990-T, line 38...

### Revenue

8. Contributions and grants (Part VIII, line 1h)...

9. Program service revenue (Part VIII, line 2g)...

10. Investment income (Part VIII, column (A), lines 3, 4, and 7d)...

11. Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)...

12. Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)...

### Expenses

13. Grants and similar amounts paid (Part IX, column (A), lines 1–3)...

14. Benefits paid to or for members (Part IX, column (A), line 4)...

15. Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)...

16a. Professional fundraising fees (Part IX, column (A), line 11e)...

17. Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)...

18. Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)...

19. Revenue less expenses. Subtract line 18 from line 12...

### 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.

**Signature Here**

Michelle Braun, President & CEO

**Type or print name and title**

**Date**

**Check if self-employed**

<table>
<thead>
<tr>
<th>PTIN</th>
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</table>

**Firm’s EIN**

**Phone no.**

May the IRS discuss this return with the preparer shown above? (see instructions)...
Part III  Statement of Program Service Accomplishments

1 Briefly describe the organization’s mission:

Solve our community’s toughest challenges by connecting people, resources and ideas.

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 $5,364,026 including grants of $2,953,034 ) (Revenue $0 )

United Way funds programs that deliver vital services to the community including a community support network to coordinate planning; information and referral services; volunteer recruitment and engagement; and basic needs and disaster services. United Way’s 2-1-1 is a unique program that offers free, confidential information and referral 24 hours a day, seven days a week for any resident in nine counties of Northeast Florida (Duval, St. Johns, Clay, Nassau, Baker, Putnam, Columbia, Suwannee and Hamilton counties) who may not know where to turn for help. The 2-1-1 program assists with emergency financial assistance, food, shelter, and counseling. 2-1-1 Achievements - United Way 2-1-1 received 82,684 phone calls in FY2018-19 and made 59,480 referrals for callers who were in need of emergency financial assistance and other related needs - food, shelter, clothing, childcare, counseling, etc. United Way 2-1-1 Call Center Specialists also assisted 1,165 suicide/crisis callers in FY2018-19. Approximately 90 percent of all referrals were to Duval County residents. Additionally, United Way 2-1-1 received grant funding to provide veteran specific services under the My Florida Vets program. As a result, a care coordinator and a resource specialist position have been hired and trained to support the veterans within the United Way 2-1-1 service area. The (Continued on Schedule O, Statement 1)

4b (Code: _) (Expenses $4,953,070 including grants of $4,689,518 ) (Revenue $0 )

Education: United Way is creating positive, long-lasting change that ultimately prevents problems before they happen. Research and analysis show that when children enter school ready to learn, they succeed and targeted action such as school-based social services and mentoring help students graduate on time. United Way sponsors programs that provide mentoring, counseling, case management, teen parenting prevention and support, after-school activities, tutoring and enrichment activities to help students succeed even when they are faced with obstacles. Improved access to quality early learning through United Way-sponsored programs helps children from birth to five years grow, develop and learn. Achievements of several key United Way-led initiatives include: *Achievers For Life Achievements - A partnership was formed in 2006 to study why students drop out of school. The Partnership’s 11 months of research resulted in the development of Achievers For Life, which was implemented in fall 2007 in Ft. Caroline and Arlington Middle Schools. United Way’s Achievers For Life (AFL) is a dropout prevention strategy focused on middle school students who are at-risk for academic failure. Dropping out is a gradual process with signs appearing as early as middle school. Warning signs of dropping out in the future include poor attendance, behavior, reading and math grades and reading and (Continued on Schedule O, Statement 2)

4c (Code: _) (Expenses $3,985,130 including grants of $2,419,171 ) (Revenue $0 )

Health: New and evolving health issues require utilization of collaborative partnerships. Through donor contributions and various grant funders, United Way advances the common good by creating opportunities for a better life for citizens of all ages. We proudly support twenty health agencies and twenty-two programs that address critical issues such as emergency services to help prevent and combat domestic violence and child abuse, providing access to health care services and nutritious food; help seniors and individuals with disabilities live independently. *Full Service Schools Achievements - Full Service Schools (Continued on Schedule O, Statement 3)

4d Other program services (Describe in Schedule O.)  

(See Schedule O, Statement 4)

(Expenses $5,999,944 including grants of $5,087,036 ) (Revenue $0 )

4e Total program service expenses  

20,302,170
## Checklist of Required Schedules

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### Part IV Checklist of Required Schedules (continued)

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### 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

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<tr>
<th></th>
<th>Yes</th>
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### Part V  Statements Regarding Other IRS Filings and Tax Compliance (continued)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Yes</th>
<th>No</th>
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<tr>
<td>2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return</td>
<td></td>
<td>2a</td>
</tr>
<tr>
<td><strong>b</strong> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?</td>
<td></td>
<td>2b</td>
</tr>
<tr>
<td><strong>Note.</strong> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a Did the organization have unrelated business gross income of $1,000 or more during the year?</td>
<td></td>
<td>3a</td>
</tr>
<tr>
<td><strong>b</strong> If &quot;Yes,&quot; has it filed a Form 990-T for this year? If &quot;No&quot; to line 3b, provide an explanation in Schedule O.</td>
<td></td>
<td>3b</td>
</tr>
<tr>
<td>4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?</td>
<td></td>
<td>4a</td>
</tr>
<tr>
<td><strong>b</strong> If &quot;Yes,&quot; enter the name of the foreign country: ▶</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Note.</strong> See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?</td>
<td></td>
<td>5a</td>
</tr>
<tr>
<td><strong>b</strong> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</td>
<td></td>
<td>5b</td>
</tr>
<tr>
<td><strong>c</strong> If &quot;Yes&quot; to line 5a or 5b, did the organization file Form 8886-T?</td>
<td></td>
<td>5c</td>
</tr>
<tr>
<td>6a Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?</td>
<td></td>
<td>6a</td>
</tr>
<tr>
<td><strong>b</strong> If &quot;Yes,&quot; did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?</td>
<td></td>
<td>6b</td>
</tr>
<tr>
<td>7 <strong>Organizations that may receive deductible contributions under section 170(c).</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?</td>
<td></td>
<td>7a</td>
</tr>
<tr>
<td><strong>b</strong> If &quot;Yes,&quot; did the organization notify the donor of the value of the goods or services provided?</td>
<td></td>
<td>7b</td>
</tr>
<tr>
<td>c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?</td>
<td></td>
<td>7c</td>
</tr>
<tr>
<td><strong>d</strong> If &quot;Yes,&quot; indicate the number of Forms 8282 filed during the year</td>
<td></td>
<td>7d</td>
</tr>
<tr>
<td>e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</td>
<td></td>
<td>7e</td>
</tr>
<tr>
<td><strong>f</strong> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</td>
<td></td>
<td>7f</td>
</tr>
<tr>
<td>g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?</td>
<td></td>
<td>7g</td>
</tr>
<tr>
<td>h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?</td>
<td></td>
<td>7h</td>
</tr>
<tr>
<td>8 <strong>Sponsoring organizations maintaining donor advised funds.</strong> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>9 <strong>Sponsoring organizations maintaining donor advised funds.</strong></td>
<td></td>
<td>9a</td>
</tr>
<tr>
<td><strong>b</strong> Did the sponsoring organization make any taxable distributions under section 4966?</td>
<td></td>
<td>9b</td>
</tr>
<tr>
<td>10 <strong>Section 501(c)(7) organizations.</strong> Enter:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Initiation fees and capital contributions included on Part VIII, line 12</td>
<td></td>
<td>10a</td>
</tr>
<tr>
<td>b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</td>
<td></td>
<td>10b</td>
</tr>
<tr>
<td>11 <strong>Section 501(c)(12) organizations.</strong> Enter:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Gross income from members or shareholders</td>
<td></td>
<td>11a</td>
</tr>
<tr>
<td>b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)</td>
<td></td>
<td>11b</td>
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<tr>
<td>12a <strong>Section 4947(a)(1) non-exempt charitable trusts.</strong> Is the organization filing Form 990 in lieu of Form 1041?</td>
<td></td>
<td>12a</td>
</tr>
<tr>
<td><strong>b</strong> If &quot;Yes,&quot; enter the amount of tax-exempt interest received or accrued during the year.</td>
<td></td>
<td>12b</td>
</tr>
<tr>
<td>13 <strong>Section 501(c)(29) qualified nonprofit health insurance issuers.</strong></td>
<td></td>
<td>13a</td>
</tr>
<tr>
<td>a Is the organization licensed to issue qualified health plans in more than one state?</td>
<td></td>
<td>13a</td>
</tr>
<tr>
<td><strong>Note.</strong> See the instructions for additional information the organization must report on Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.</td>
<td></td>
<td>13b</td>
</tr>
<tr>
<td>c Enter the amount of reserves on hand.</td>
<td></td>
<td>13c</td>
</tr>
<tr>
<td>14a Did the organization receive any payments for indoor tanning services during the tax year?</td>
<td></td>
<td>14a</td>
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<tr>
<td><strong>b</strong> If &quot;Yes,&quot; has it filed a Form 720 to report these payments? If &quot;No,&quot; provide an explanation in Schedule O.</td>
<td></td>
<td>14b</td>
</tr>
<tr>
<td>15 Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?</td>
<td></td>
<td>15</td>
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<tr>
<td><strong>a</strong> If &quot;Yes,&quot; see instructions and file Form 4720, Schedule N.</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If &quot;Yes,&quot; complete Form 4720, Schedule O.</td>
<td></td>
<td>16</td>
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### Part VI  Governance, Management, and Disclosure

For each “Yes” response to lines 2 through 7b below, and for a “No” response to line 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

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<th>Line</th>
<th>Question</th>
<th>Yes</th>
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<tbody>
<tr>
<td>1a</td>
<td>Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>1b</td>
<td>Enter the number of voting members included in line 1a, above, who are independent.</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?</td>
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<td>✔</td>
</tr>
<tr>
<td>3</td>
<td>Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?</td>
<td>3</td>
<td>✔</td>
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<tr>
<td>4</td>
<td>Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?</td>
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<td>✔</td>
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<tr>
<td>5</td>
<td>Did the organization become aware during the year of a significant diversion of the organization’s assets?</td>
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<tr>
<td>6</td>
<td>Did the organization have members or stockholders?</td>
<td>6</td>
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<tr>
<td>7a</td>
<td>Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?</td>
<td>7a</td>
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<td>7b</td>
<td>Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?</td>
<td>7b</td>
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<td>8</td>
<td>Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:</td>
<td>8a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>a. The governing body?</td>
<td>8a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. Each committee with authority to act on behalf of the governing body?</td>
<td>8b</td>
<td>✔</td>
</tr>
<tr>
<td>9</td>
<td>Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization’s mailing address? If “Yes,” provide the names and addresses in Schedule O.</td>
<td>9</td>
<td>✔</td>
</tr>
</tbody>
</table>

#### Section B. Policies

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>10a</td>
<td>Did the organization have local chapters, branches, or affiliates?</td>
<td>10a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. If “Yes,” did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization’s exempt purposes?</td>
<td>10b</td>
<td>✔</td>
</tr>
<tr>
<td>11a</td>
<td>Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?</td>
<td>11a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. Describe in Schedule O the process, if any, used by the organization to review this Form 990.</td>
<td>12a</td>
<td>✔</td>
</tr>
<tr>
<td>12a</td>
<td>Did the organization have a written conflict of interest policy? If “No,” go to line 13</td>
<td>12a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?</td>
<td>12b</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>c. Did the organization regularly and consistently monitor and enforce compliance with the policy? If “Yes,” describe in Schedule O how this was done.</td>
<td>12c</td>
<td>✔</td>
</tr>
<tr>
<td>13</td>
<td>Did the organization have a written whistleblower policy?</td>
<td>13</td>
<td>✔</td>
</tr>
<tr>
<td>14</td>
<td>Did the organization have a written document retention and destruction policy?</td>
<td>14</td>
<td>✔</td>
</tr>
<tr>
<td>15</td>
<td>Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?</td>
<td>15a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>a. The organization’s CEO, Executive Director, or top management official</td>
<td>15b</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. Other officers or key employees of the organization</td>
<td>16a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>If “Yes” to line 15a or 15b, describe the process in Schedule O (see instructions).</td>
<td>16b</td>
<td>✔</td>
</tr>
<tr>
<td>16a</td>
<td>Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?</td>
<td>16a</td>
<td>✔</td>
</tr>
<tr>
<td></td>
<td>b. If “Yes,” did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization’s exempt status with respect to such arrangements?</td>
<td>16b</td>
<td>✔</td>
</tr>
</tbody>
</table>

#### Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ► None

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c) (3)s only) available for public inspection. Indicate how you made these available. Check all that apply.

- ✔ Own website
- ✔ Another’s website
- ✔ Upon request
- ☐ Other (explain in Schedule O)

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 ► Richard Butcher, (904)390-3210

40 East Adams Street Suite 200, Jacksonville, FL 32202
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, and 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

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

<table>
<thead>
<tr>
<th>Name and Title</th>
<th>Average hours per week (list any hours for related organizations below dotted line)</th>
<th>Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Scanlon</td>
<td>2.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Treasurer</td>
<td>0.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Mike Herman</td>
<td>2.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Jim Stepnoski</td>
<td>2.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Douglas Baer</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Scott Coble</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Barbara Drake</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Melissa Dykes</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Nathaniel Ford</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pat Geraghty</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Robert Hill</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sara Ley</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Frank Martire</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>David Miller</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Lisa Palmer</td>
<td>1.00</td>
<td>✔️</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
### Part VII  
**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)**

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week (list any hours for related organizations below dotted line)</th>
<th>(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ned Peverley</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mike Prendergast</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beth Tate</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russ Thomas</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Michael Ward</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John Wilbanks</td>
<td>1.00</td>
<td>✔</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Board of Directors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Michelle Braun</td>
<td>57.00</td>
<td>✔</td>
<td>244,202</td>
<td>0</td>
<td>31,926</td>
</tr>
<tr>
<td>President, CEO and Board Secretary</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patricia Kilgore</td>
<td>56.29</td>
<td>✔</td>
<td>149,928</td>
<td>0</td>
<td>-3,080</td>
</tr>
<tr>
<td>Vice President - Finance &amp; Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phyllis Martin</td>
<td>45.22</td>
<td>✔</td>
<td>128,670</td>
<td>0</td>
<td>19,086</td>
</tr>
<tr>
<td>Head of Community Impact &amp; Strategic Investment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kristie Naines</td>
<td>42.57</td>
<td>✔</td>
<td>126,048</td>
<td>0</td>
<td>13,623</td>
</tr>
<tr>
<td>Head of Tocqueville &amp; Major Gifts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maureen Mercho</td>
<td>42.78</td>
<td>✔</td>
<td>101,166</td>
<td>0</td>
<td>19,020</td>
</tr>
<tr>
<td>Head of Marketing, Communication &amp; Campaign</td>
<td></td>
<td></td>
<td>750,014</td>
<td>0</td>
<td>80,575</td>
</tr>
<tr>
<td>1b Sub-total</td>
<td></td>
<td></td>
<td>750,014</td>
<td>0</td>
<td>80,575</td>
</tr>
<tr>
<td>c Total from continuation sheets to Part VII, Section A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1c Total (add lines 1b and 1c)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1d Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 | 0 |
### Part VIII Statement of Revenue

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

<table>
<thead>
<tr>
<th>Contributions, Gifts, Grants and Other Similar Amounts</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512–514</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Federated campaigns</td>
<td>1a  48,999</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>b Membership dues</td>
<td>1b  0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>c Fundraising events</td>
<td>1c  0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>d Related organizations</td>
<td>1d  0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>e Government grants (contributions)</td>
<td>1e  2,595,133</td>
<td>0</td>
<td>0</td>
<td>2,595,133</td>
</tr>
<tr>
<td>f All other contributions, gifts, grants, and similar amounts not included above</td>
<td>1f  18,541,287</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>g Noncash contributions included in lines 1a–1f: $</td>
<td>1f  288,144</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>h <strong>Total.</strong> Add lines 1a–1f</td>
<td><strong>21,185,419</strong></td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Service Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td></td>
</tr>
<tr>
<td>e</td>
<td></td>
</tr>
<tr>
<td>f All other program service revenue</td>
<td></td>
</tr>
<tr>
<td>g <strong>Total.</strong> Add lines 2a–2f</td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Revenue</th>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Investment income (including dividends, interest, and other similar amounts)</td>
<td>71,339 0 0 71,339</td>
</tr>
<tr>
<td>4 Income from investment of tax-exempt bond proceeds</td>
<td>0 0 0 0</td>
</tr>
<tr>
<td>5 Royalties</td>
<td>0 0 0 0</td>
</tr>
<tr>
<td>6a Gross rents</td>
<td></td>
</tr>
<tr>
<td>6b Less: rental expenses</td>
<td></td>
</tr>
<tr>
<td>6c Rental income or (loss)</td>
<td>0 0</td>
</tr>
<tr>
<td>6d Net rental income or (loss)</td>
<td></td>
</tr>
<tr>
<td>7a Gross amount from sales of assets other than inventory</td>
<td></td>
</tr>
<tr>
<td>7b Less: cost or other basis and sales expenses</td>
<td>329,994 0</td>
</tr>
<tr>
<td>7c Gain or (loss)</td>
<td>-3,470 0</td>
</tr>
<tr>
<td>7d Net gain or (loss)</td>
<td>-3,470 0</td>
</tr>
<tr>
<td>8a Gross income from fundraising events (not including $ of contributions reported on line 1c). See Part IV, line 19</td>
<td></td>
</tr>
<tr>
<td>8b Less: direct expenses</td>
<td></td>
</tr>
<tr>
<td>9a Gross income from gaming activities.</td>
<td></td>
</tr>
<tr>
<td>9b Less: direct expenses</td>
<td></td>
</tr>
<tr>
<td>9c Net income or (loss) from gaming activities</td>
<td></td>
</tr>
<tr>
<td>10a Gross sales of inventory, less returns and allowances</td>
<td></td>
</tr>
<tr>
<td>10b Less: cost of goods sold</td>
<td></td>
</tr>
<tr>
<td>10c Net income or (loss) from sales of inventory</td>
<td></td>
</tr>
<tr>
<td>11a Miscellaneous Revenue</td>
<td>Business Code</td>
</tr>
<tr>
<td>11b</td>
<td></td>
</tr>
<tr>
<td>11c</td>
<td></td>
</tr>
<tr>
<td>11d All other revenue</td>
<td></td>
</tr>
<tr>
<td>11e <strong>Total.</strong> Add lines 11a–11d</td>
<td><strong>0</strong></td>
</tr>
<tr>
<td>12 <strong>Total revenue.</strong> See instructions</td>
<td><strong>21,253,288</strong></td>
</tr>
<tr>
<td>Line</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>1</td>
<td>Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21</td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to domestic individuals. See Part IV, line 22</td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16</td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)</td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
</tr>
<tr>
<td>8</td>
<td>Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (non-employees):</td>
</tr>
<tr>
<td>a</td>
<td>Management</td>
</tr>
<tr>
<td>b</td>
<td>Legal</td>
</tr>
<tr>
<td>c</td>
<td>Accounting</td>
</tr>
<tr>
<td>d</td>
<td>Lobbying</td>
</tr>
<tr>
<td>e</td>
<td>Professional fundraising services. See Part IV, line 17</td>
</tr>
<tr>
<td>f</td>
<td>Investment management fees</td>
</tr>
<tr>
<td>g</td>
<td>Other. If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.</td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
</tr>
<tr>
<td>24</td>
<td>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.)</td>
</tr>
<tr>
<td>a</td>
<td>Awards</td>
</tr>
<tr>
<td>b</td>
<td>Maintenance &amp; Repairs</td>
</tr>
<tr>
<td>c</td>
<td>Dues</td>
</tr>
<tr>
<td>d</td>
<td>Purchase Services/Program Evaluation</td>
</tr>
<tr>
<td>e</td>
<td>All other expenses</td>
</tr>
<tr>
<td>25</td>
<td>Total functional expenses. Add lines 1 through 24e</td>
</tr>
<tr>
<td>26</td>
<td>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 ▶ if following SOP 98-2 (ASC 958-720)</td>
</tr>
</tbody>
</table>
## Balance Sheet

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

<table>
<thead>
<tr>
<th></th>
<th>(A) - Beginning of year</th>
<th>(B) - End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash—non-interest-bearing</td>
<td>6,710,947</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>1,987,806</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>7,358,708</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>119,239</td>
</tr>
<tr>
<td>5</td>
<td>Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>Notes and loans receivable, net</td>
<td>687,728</td>
</tr>
<tr>
<td>8</td>
<td>Inventories for sale or use</td>
<td>0</td>
</tr>
<tr>
<td>9</td>
<td>Prepaid expenses and deferred charges</td>
<td>1,343,176</td>
</tr>
<tr>
<td>10a</td>
<td>Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D</td>
<td>2,431,015</td>
</tr>
<tr>
<td>b</td>
<td>Less: accumulated depreciation</td>
<td>1,095,540</td>
</tr>
<tr>
<td>11</td>
<td>Investments—publicly traded securities</td>
<td>2,298,551</td>
</tr>
<tr>
<td>12</td>
<td>Investments—other securities. See Part IV, line 11</td>
<td>0</td>
</tr>
<tr>
<td>13</td>
<td>Investments—program-related. See Part IV, line 11</td>
<td>0</td>
</tr>
<tr>
<td>14</td>
<td>Intangible assets</td>
<td>0</td>
</tr>
<tr>
<td>15</td>
<td>Other assets. See Part IV, line 11</td>
<td>400,000</td>
</tr>
<tr>
<td>16</td>
<td><strong>Total assets.</strong> Add lines 1 through 15 (must equal line 34)</td>
<td>21,519,084</td>
</tr>
<tr>
<td>17</td>
<td>Accounts payable and accrued expenses</td>
<td>514,272</td>
</tr>
<tr>
<td>18</td>
<td>Grants payable</td>
<td>0</td>
</tr>
<tr>
<td>19</td>
<td>Deferred revenue</td>
<td>0</td>
</tr>
<tr>
<td>20</td>
<td>Tax-exempt bond liabilities</td>
<td>0</td>
</tr>
<tr>
<td>21</td>
<td>Escrow or custodial account liability. Complete Part IV of Schedule D</td>
<td>0</td>
</tr>
<tr>
<td>22</td>
<td>Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L</td>
<td>0</td>
</tr>
<tr>
<td>23</td>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td>240,000</td>
</tr>
<tr>
<td>24</td>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td>0</td>
</tr>
<tr>
<td>25</td>
<td>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</td>
<td>2,641,729</td>
</tr>
<tr>
<td>26</td>
<td><strong>Total liabilities.</strong> Add lines 17 through 25</td>
<td>3,396,001</td>
</tr>
<tr>
<td>27</td>
<td>Organizations that follow SFAS 117 (ASC 958), check here ▶ and complete lines 27 through 29, and lines 33 and 34.</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Unrestricted net assets</td>
<td>12,965,072</td>
</tr>
<tr>
<td>29</td>
<td>Temporarily restricted net assets</td>
<td>4,062,471</td>
</tr>
<tr>
<td>30</td>
<td>Permanently restricted net assets</td>
<td>1,095,540</td>
</tr>
<tr>
<td>31</td>
<td>Capital stock or trust principal, or current funds</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Retained earnings, endowment, accumulated income, or other funds</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Total net assets or fund balances</td>
<td>18,123,083</td>
</tr>
<tr>
<td>34</td>
<td>Total liabilities and net assets/fund balances</td>
<td>21,519,084</td>
</tr>
</tbody>
</table>
### Part XI Reconciliation of Net Assets

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

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
<td>21,253,288</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
<td>23,518,440</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
<td>-2,265,152</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))</td>
<td>18,123,083</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
<td>59,738</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
<td>0</td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
<td>3,471</td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
<td>0</td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain in Schedule O)</td>
<td>499,731</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))</td>
<td>16,420,871</td>
</tr>
</tbody>
</table>

### Part XII Financial Statements and Reporting

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

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990: ☑ Cash ☑ Accrual ☐ Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the organization changed its method of accounting from a prior year or checked “Other,” explain in Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization’s financial statements compiled or reviewed by an independent accountant?</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Were the organization’s financial statements audited by an independent accountant?</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>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?</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>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?</td>
<td>☑</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3b</td>
<td></td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>
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.

Name of the organization: UNITED WAY OF NORTHEAST FLORIDA INC  
Employer identification number: 59-0637825

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 section 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):  

<table>
<thead>
<tr>
<th>(i) Name of supported organization</th>
<th>(ii) EIN</th>
<th>(iii) Type of organization (described on lines 1–10 above (see instructions))</th>
<th>(iv) Is the organization listed in your governing document?</th>
<th>(v) Amount of monetary support (see instructions)</th>
<th>(vi) Amount of other support (see instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(A)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(B)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(C)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(D)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(E)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.  
Cat. No. 11285F  
Schedule A (Form 990 or 990-EZ) 2018
### 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 fails to qualify under the tests listed below, please complete Part III.)

#### Section A. Public Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td>20,651,807</td>
<td>20,349,854</td>
<td>18,783,621</td>
<td>22,891,578</td>
<td>16,808,892</td>
<td>99,485,752</td>
</tr>
<tr>
<td>2 Tax revenues levied for the organization’s benefit and either paid to or expended on its behalf</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3 The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4 Total. Add lines 1 through 3</td>
<td>20,651,807</td>
<td>20,349,854</td>
<td>18,783,621</td>
<td>22,891,578</td>
<td>16,808,892</td>
<td>99,485,752</td>
</tr>
<tr>
<td>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)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Public support. Subtract line 5 from line 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>5,097,700</td>
</tr>
</tbody>
</table>

#### Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Amounts from line 4</td>
<td>20,651,807</td>
<td>20,349,854</td>
<td>18,783,621</td>
<td>22,891,578</td>
<td>16,808,892</td>
<td>99,485,752</td>
</tr>
<tr>
<td>8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td>24,281</td>
<td>3,823</td>
<td>99,025</td>
<td>87,516</td>
<td>71,339</td>
<td>285,984</td>
</tr>
<tr>
<td>9 Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>11 Total support. Add lines 7 through 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>99,771,736</td>
</tr>
<tr>
<td>12 Gross receipts from related activities, etc. (see instructions)</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>13 First five 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f))</td>
<td>94.6 %</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Public support percentage from 2017 Schedule A, Part II, line 14</td>
<td>95.49 %</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16a 33 1/3% support test—2018. 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</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16b 33 1/3% support test—2017. 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17a 10%-facts-and-circumstances test—2018. 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17b 10%-facts-and-circumstances test—2017. 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 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)**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gifts, grants, contributions, and membership fees received. (Do not include any “unusual grants.”)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Gross receipts from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax revenues levied for the organization’s benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Total. Add lines 1 through 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Amounts included on lines 1, 2, and 3 received from disqualified persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Public support. (Subtract line 7c from line 6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Total Support

**Calendar year (or fiscal year beginning in)**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) 2018</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Amounts from line 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a</td>
<td>Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Total support. (Add lines 9, 10c, 11, and 12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>First five 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Computation of Public Support Percentage

15 Public support percentage for 2018 (line 8, column (f), divided by line 13, column (f)) | 15 |
16 Public support percentage from 2017 Schedule A, Part III, line 15 | 16 |

### Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2018 (line 10c, column (f), divided by line 13, column (f)) | 17 |
18 Investment income percentage from 2017 Schedule A, Part III, line 17 | 18 |
19a 331/3% support tests—2018. If the organization did not check the box on line 14, and line 15 is more than 331/3%, and line 17 is not more than 331/3%, check this box and stop here. The organization qualifies as a publicly supported organization | |
19b 331/3% support tests—2017. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 331/3%, and line 18 is not more than 331/3%, 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 in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Are all of the organization’s supported organizations listed by name in the organization’s governing documents? 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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If “Yes,” explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If “Yes,” answer (b) and (c) below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If “Yes,” describe in Part VI when and how the organization made the determination.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4a Was any supported organization not organized in the United States (“foreign supported organization”)? If “Yes,” and if you checked 12a or 12b in Part I, answer (b) and (c) below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? 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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If “Yes,” explain in 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.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5a Did the organization add, substitute, or remove any supported organizations during the tax year? If “Yes,” answer (b) and (c) 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).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5b 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?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5c Substitutions only. Was the substitution the result of an event beyond the organization’s control?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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? If “Yes,” provide detail in Part VI.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If “Yes,” complete Part I of Schedule L (Form 990 or 990-EZ).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If “Yes,” complete Part I of Schedule L (Form 990 or 990-EZ).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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))? If “Yes,” provide detail in Part VI.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9b 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? If “Yes,” provide detail in Part VI.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9c 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? If “Yes,” provide detail in Part VI.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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)? If “Yes,” answer 10b below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Schedule A (Form 990 or 990-EZ) 2018
### Part IV Supporting Organizations (continued)

**Section A. All Supporting Organizations**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Has the organization accepted a gift or contribution from any of the following persons?</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>a</td>
<td>A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?</td>
</tr>
<tr>
<td></td>
<td>b</td>
<td>A family member of a person described in (a) above?</td>
</tr>
<tr>
<td></td>
<td>c</td>
<td>A 35% controlled entity of a person described in (a) or (b) above? If “Yes” to a, b, or c, provide detail in Part VI.</td>
</tr>
</tbody>
</table>

**Section B. Type I Supporting Organizations**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Did the 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? 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.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>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? 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.</td>
<td></td>
</tr>
</tbody>
</table>

**Section C. Type II Supporting Organizations**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>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)? 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).</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>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? If “No,” explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>By reason of the relationship described in (2), 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? If “Yes,” describe in Part VI the role the organization’s supported organizations played in this regard.</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a</td>
<td>The organization satisfied the Activities Test. Complete line 2 below.</td>
</tr>
<tr>
<td></td>
<td>b</td>
<td>The organization is the parent of each of its supported organizations. Complete line 3 below.</td>
</tr>
<tr>
<td></td>
<td>c</td>
<td>The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).</td>
</tr>
<tr>
<td>2</td>
<td>Activities Test. Answer (a) and (b) below.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a</td>
<td>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? 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.</td>
</tr>
<tr>
<td></td>
<td>b</td>
<td>Did the activities described in (a) constitute activities that, but for the organization’s involvement, one or more of the organization’s supported organization(s) would have been engaged in? 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.</td>
</tr>
<tr>
<td>3</td>
<td>Parent of Supported Organizations. Answer (a) and (b) below.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a</td>
<td>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? Provide details in Part VI.</td>
</tr>
<tr>
<td></td>
<td>b</td>
<td>Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If “Yes,” describe in Part VI the role played by the organization in this regard.</td>
</tr>
</tbody>
</table>
**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

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Net short-term capital gain</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2 Recoveries of prior-year distributions</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3 Other gross income (see instructions)</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4 Add lines 1 through 3.</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5 Depreciation and depletion</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>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)</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7 Other expenses (see instructions)</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8 Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

### Section B—Minimum Asset Amount

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Average monthly value of securities</td>
<td>1a</td>
<td></td>
</tr>
<tr>
<td>b Average monthly cash balances</td>
<td>1b</td>
<td></td>
</tr>
<tr>
<td>c Fair market value of other non-exempt-use assets</td>
<td>1c</td>
<td></td>
</tr>
<tr>
<td>d Total (add lines 1a, 1b, and 1c)</td>
<td>1d</td>
<td></td>
</tr>
<tr>
<td>e Discount claimed for blockage or other factors (explain in detail in Part VI):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Acquisition indebtedness applicable to non-exempt-use assets</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3 Subtract line 2 from line 1d.</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4 Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions).</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5 Net value of non-exempt-use assets (subtract line 4 from line 3)</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6 Multiply line 5 by .035.</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7 Recoveries of prior-year distributions</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8 Minimum Asset Amount (add line 7 to line 6)</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

### Section C—Distributable Amount

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

7. □ Check here if the current year is the organization’s first as a non-functionally integrated Type III supporting organization (see instructions).
### Part V  Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

#### Section D—Distributions

<table>
<thead>
<tr>
<th></th>
<th>Current Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amounts paid to supported organizations to accomplish exempt purposes</td>
</tr>
<tr>
<td>2</td>
<td>Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity</td>
</tr>
<tr>
<td>3</td>
<td>Administrative expenses paid to accomplish exempt purposes of supported organizations</td>
</tr>
<tr>
<td>4</td>
<td>Amounts paid to acquire exempt-use assets</td>
</tr>
<tr>
<td>5</td>
<td>Qualified set-aside amounts (prior IRS approval required)</td>
</tr>
<tr>
<td>6</td>
<td>Other distributions (describe in Part VI). See instructions.</td>
</tr>
<tr>
<td>7</td>
<td><strong>Total annual distributions.</strong> Add lines 1 through 6.</td>
</tr>
<tr>
<td>8</td>
<td>Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.</td>
</tr>
<tr>
<td>9</td>
<td>Distributable amount for 2018 from Section C, line 6</td>
</tr>
<tr>
<td>10</td>
<td>Line 8 amount divided by line 9 amount</td>
</tr>
</tbody>
</table>

#### Section E—Distribution Allocations (see instructions)

<table>
<thead>
<tr>
<th></th>
<th>Excess Distributions</th>
<th>Underdistributions Pre-2018</th>
<th>Distributable Amount for 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Distributable amount for 2018 from Section C, line 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Underdistributions, if any, for years prior to 2018 (reasonable cause required—explain in Part VI). See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any, to 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>From 2013 . . . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>From 2014 . . . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>From 2015 . . . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>From 2016 . . . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>From 2017 . . . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td><strong>Total</strong> of lines 3a through e</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Applied to 2018 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Carryover from 2013 not applied (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Remainder. Subtract lines 3g, 3h, and 3i from 3f.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Distributions for 2018 from Section D, line 7: $</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Applied to 2018 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Remainder. Subtract lines 4a and 4b from 4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Remaining underdistributions for years prior to 2018, if any. Subtract lines 3g and 4a from 2. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Remaining underdistributions for 2018. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Excess distributions carryover to 2019.</strong> Add lines 3j and 4c.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Breakdown of line 7:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Excess from 2014 . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Excess from 2015 . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Excess from 2016 . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Excess from 2017 . . .</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Excess from 2018 . . .</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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.)
SCHEDULE D
(Form 990)

Supplemental Financial Statements

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

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 grantees and donor advisors in writing that the assets held in donor advised funds are the organization’s property, subject to the organization’s exclusive legal control?
6. Did the organization inform all 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?

Part II
Conservation Easements.

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

1. Purpose(s) of conservation easements held by the organization (check all that apply).
2. Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.
3. Number of conservation easements.
4. Number of states where property subject to conservation easement is located.
5. Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?
6. Staff and volunteer hours devoted to monitoring, inspection, handling of violations, and enforcing conservation easements during the year.
7. Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year.
8. Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)?
9. In Part III, 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.

1. If the organization elected, as permitted under SFAS 116 (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.
2. If the organization elected, as permitted under SFAS 116 (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.
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):

- Public exhibition
- Scholarly research
- Preservation for future generations
- Loan or exchange programs
- 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

1b If “Yes,” explain the arrangement in Part XIII and complete the following table:

<table>
<thead>
<tr>
<th>Description of property</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?  

Yes  No

2b If “Yes,” explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII.

Part V  Endowment Funds.

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

1a Beginning of year balance  

1b Contributions  

1c Net investment earnings, gains, and losses  

1d Additions during the year  

1e Distributions during the year  

1f Ending balance  

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

- Board designated or quasi-endowment  
- Permanent endowment  
- Temporarily restricted 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:

- Unrelated organizations  
- Related organizations  

If “Yes” on line 3a(ii), are the related organizations listed as required on Schedule R?  

Yes  No

3b 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>
<thead>
<tr>
<th>Description of property</th>
<th>Cost or other basis (investment)</th>
<th>Cost or other basis (other)</th>
<th>Accumulated depreciation</th>
<th>Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Land</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>1b Buildings</td>
<td>0</td>
<td>0</td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>1c Leasehold improvements</td>
<td>0</td>
<td>1,636,006</td>
<td>573,846</td>
<td>1,062,160</td>
</tr>
<tr>
<td>1d Equipment</td>
<td>0</td>
<td>795,009</td>
<td>769,330</td>
<td>25,679</td>
</tr>
<tr>
<td>1e Other</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)  

1,087,839
Part VII  Investments—Other Securities.
Complete if the organization answered “Yes” on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

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

Part VIII  Investments—Program Related.
Complete if the organization answered “Yes” on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation:</th>
<th>Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total.</strong> (Column (b) must equal Form 990, Part X, col. (B) line 13.)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Part IX  Other Assets.
Complete if the organization answered “Yes” on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
<tr>
<td><strong>Total.</strong> (Column (b) must equal Form 990, Part X, col. (B) line 15.)</td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>(a) Description of liability</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Federal income taxes</td>
<td>0</td>
</tr>
<tr>
<td>(2) Designations Payable</td>
<td>2,379,561</td>
</tr>
<tr>
<td>(3) Deferred Lease Incentive</td>
<td>550,108</td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
<tr>
<td><strong>Total.</strong> (Column (b) must equal Form 990, Part X, col. (B) line 25.)</td>
<td>2,929,669</td>
</tr>
</tbody>
</table>
Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

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

<table>
<thead>
<tr>
<th>Part XI</th>
<th>Reconciliation of Revenue per Audited Financial Statements With Revenue per Return.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements . . . . . .</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part VIII, line 12:</td>
</tr>
<tr>
<td>a</td>
<td>Net unrealized gains (losses) on investments . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>b</td>
<td>Donated services and use of facilities . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>c</td>
<td>Recovers of prior year grants . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>d</td>
<td>Other (Describe in Part XIII.) . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>e</td>
<td>Add lines 2a through 2d . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1 . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part VIII, line 12, but not on line 1:</td>
</tr>
<tr>
<td>a</td>
<td>Investment expenses not included on Form 990, Part VIII, line 7b . . . . . . . . .</td>
</tr>
<tr>
<td>b</td>
<td>Other (Describe in Part XIII.) . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>c</td>
<td>Add lines 4a and 4b . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>5</td>
<td>Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)</td>
</tr>
</tbody>
</table>

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

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

<table>
<thead>
<tr>
<th>Part XII</th>
<th>Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements . . . . . . . . . . . .</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part IX, line 25:</td>
</tr>
<tr>
<td>a</td>
<td>Donated services and use of facilities . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>b</td>
<td>Prior year adjustments . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>c</td>
<td>Other losses . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>d</td>
<td>Other (Describe in Part XIII.) . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>e</td>
<td>Add lines 2a through 2d . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1 . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part IX, line 25, but not on line 1:</td>
</tr>
<tr>
<td>a</td>
<td>Investment expenses not included on Form 990, Part VIII, line 7b . . . . . . . . .</td>
</tr>
<tr>
<td>b</td>
<td>Other (Describe in Part XIII.) . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>c</td>
<td>Add lines 4a and 4b . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .</td>
</tr>
<tr>
<td>5</td>
<td>Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)</td>
</tr>
</tbody>
</table>

Supplemental Information.

Schedule D, Part V, Line 4 - As part of its Planned Giving Program, United Way established and will grow endowment funds to provide income for sustaining operations against fluctuations in the annual campaign revenue; to enhance annual campaign revenue from income generated by the endowed gifts; and to provide program funding flexibility not possible through annual campaign revenue including emergency funding, venture grants, administrative costs, challenge grants and infrastructure need.

Schedule D, Part X, Line 2 - United Way is exempt from federal and state income taxes under Internal Revenue Code Section 501 (c)(3).

Schedule D, Part XI, Line 2d - Loss due to cost incurred to sale stock donors contributed.

Schedule D, Part XI, Line 4b - United Way receives numerous contributions and pledges to specific health and human service organizations.

Schedule D, Part XII, Line 4b - Distributions of numerous contributions designated to specific agencies by donors.

Schedule D, Part XIII, Line 4c - United Way generated by the endowed gifts; and to provide program funding flexibility not possible through annual campaign revenue including emergency funding, venture grants, administrative costs, challenge grants and infrastructure need.
Grants and Other Assistance to Organizations, Governments, and Individuals in the United States

Complete if the organization answered “Yes” on Form 990, Part IV, line 21 or 22.

Attach to Form 990.

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

---

**United Way of Northeast Florida Inc**

**Name of the organization**

**Employer identification number**

59-0637825

---

### Part I General Information on Grants and Assistance

1. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees’ eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  
   - Yes [ ]  
   - No [ ]

2. Describe in Part IV the organization’s procedures for monitoring the use of grant funds in the United States.

---

### Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments

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

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section (if applicable)</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of noncash assistance</th>
<th>(h) Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Sch I, Stmt 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
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2. Enter total number of section 501(c)(3) and government organizations listed in the line 1 table: 143

3. Enter total number of other organizations listed in the line 1 table: 0

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For Paperwork Reduction Act Notice, see the Instructions for Form 990.
### Part III  
**Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered “Yes” on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

<table>
<thead>
<tr>
<th>(a) Type of grant or assistance</th>
<th>(b) Number of recipients</th>
<th>(c) Amount of cash grant</th>
<th>(d) Amount of noncash assistance</th>
<th>(e) Method of valuation (book, FMV, appraisal, other)</th>
<th>(f) Description of noncash assistance</th>
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### Part IV  
**Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

*Schedule I, Part I, Line 2 - Because funding is reported by purpose, agencies may be listed more than once. However, the dollars are not duplicated. A volunteer committee of accounting professionals reviews the financial statements of the agencies requesting funding to ensure proper use of United Way funds. Funding is granted based on the criticality of the need being addressed by the program, the program’s impact on addressing the need, the participants’ results in the program, the utilization of the program’s capacity and the importance of United Way funding to the success of the program. Funding is granted through targeted Notice of Funding Opportunities (NOFO) with formal review processes occurring annually. Bi-Annual reports of performance measures and utilization of capacity are reviewed by staff and volunteers. In addition, United Way of Northeast Florida is an open donor choice organization and distributes donor designations as requested. These agencies’ programs are not subject to any United Way oversight.*

*Schedule I, Part III - In conjunction with 211 assessments, a committee utilized donor directed funds to purchase services for individuals who presented a unique health and human service need that cannot be met through traditional United Way resources.*
<table>
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<tr>
<th>Name and address</th>
<th>Recipient EIN</th>
<th>Amt. of cash grant</th>
<th>Amt. of non-cash asst.</th>
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| | 134 E Church Street Ste 2  
| | Jacksonville, FL 32202-3130  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0624375 | 153,342  
| Name and address | Challenge Enterprises of Northeast Florida  
| | P O Box 1248  
| | Green Cove Springs, FL 32043  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-1478621 | 5,328  
| Name and address | CHILD Cancer Fund  
| | 4811 Atlantic Blvd  
| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-3359840 | 7,199  
| Name and address | Child Guidance Center Inc  
| | 5776 St Augustine Road  
| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0704727 | 463,262  
| Name and address | Childrens Home Society of Florida  
| | 3027 San Diego Road  
| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Mental Health Svcs  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0192430 | 126,869  
| Name and address | Childrens Home Society of Florida  
| | 3027 San Diego Road  
| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Adoption Services  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0192430 | 32,566  
| Name and address | Childrens Home Society of Florida  
| | 3027 San Diego Road  
| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0192430 | 23,240  
| Name and address | Childrens Home Society of Florida  
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| | Jacksonville, FL 32207  
| IRC code section | 501 (c) (3)  
| Method of valuation | Donor Directed Contr  
| Desc. of Non-Cash Asst. | Purpose of grant | 59-0192430 | 9,727  

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**UNITED WAY OF NORTHEAST FLORIDA INC**
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### Schedule I, Part IV, Statement 1

#### UNITED WAY OF NORTHEAST FLORIDA INC

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*Schedule I, Part IV, Statement 1*

*UNITED WAY OF NORTHEAST FLORIDA INC*
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<th>United Way of Metropolitan Chicago</th>
<th>30-0200478</th>
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**Compensation Information**

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

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

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<td>1a</td>
<td>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.</td>
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<td></td>
<td>□ First-class or charter travel</td>
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<td>□ Travel for companions</td>
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<td>□ Tax indemnification and gross-up payments</td>
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<td>□ Discretionary spending account</td>
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<td>□ Housing allowance or residence for personal use</td>
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<td>□ Payments for business use of personal residence</td>
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<td></td>
<td>□ Health or social club dues or initiation fees</td>
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<td>□ Personal services (such as maid, chauffeur, chef)</td>
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<td>b</td>
<td>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</td>
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<td>Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?</td>
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<td>3</td>
<td>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.</td>
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<tr>
<td></td>
<td>✓ Compensation committee</td>
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<tr>
<td></td>
<td>□ Written employment contract</td>
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<td>□ Independent compensation consultant</td>
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<td></td>
<td>✓ Compensation survey or study</td>
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<td>✓ Form 990 of other organizations</td>
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<td></td>
<td>✓ Approval by the board or compensation committee</td>
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<tr>
<td>4</td>
<td>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:</td>
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</tr>
<tr>
<td>a</td>
<td>Receive a severance payment or change-of-control payment?</td>
<td>✓</td>
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<tr>
<td>b</td>
<td>Participate in, or receive payment from, a supplemental nonqualified retirement plan?</td>
<td>✓</td>
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<tr>
<td>c</td>
<td>Participate in, or receive payment from, an equity-based compensation arrangement?</td>
<td>✓</td>
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<td>If “Yes” to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.</td>
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<tr>
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<td>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:</td>
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<tr>
<td>a</td>
<td>The organization?</td>
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<tr>
<td>b</td>
<td>Any related organization?</td>
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<td>If “Yes” on line 5a or 5b, describe in Part III.</td>
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<td>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:</td>
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<tr>
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<tr>
<td>b</td>
<td>Any related organization?</td>
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<td>If “Yes” on line 6a or 6b, describe in Part III.</td>
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<td>For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If “Yes,” describe in Part III.</td>
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<td>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.</td>
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<td>9</td>
<td>If “Yes” on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.**

Cat. No. 50053T Schedule J (Form 990) 2018
### Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.

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 aren’t 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.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Breakdown of W-2 and/or 1099-MISC compensation</th>
<th>(C) Retirement and other deferred compensation</th>
<th>(D) Nontaxable benefits</th>
<th>(E) Total of columns (B)(i)–(D)</th>
<th>(F) Compensation in column (B) reported as deferred on prior Form 990</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Michelle Braun, President, CEO and Board Secretary</strong></td>
<td>(i) 234,202 (ii) 0</td>
<td>(i) 10,607 (ii) 0</td>
<td>(i) 21,319 (ii) 0</td>
<td>(i) 276,128 (ii) 0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Patricia Kilgore, Vice President - Finance &amp; Administration</strong></td>
<td>(i) 149,928 (ii) 0</td>
<td>(i) -12,319 (ii) 0</td>
<td>(i) 9,238 (ii) 0</td>
<td>(i) 146,847 (ii) 0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
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<tr>
<td>16</td>
<td></td>
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</tr>
</tbody>
</table>

Schedule J (Form 990) 2018
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.

Schedule J, Part II - The Board of Directors established the benefits package that includes health insurance, a defined benefit plan and a defined contribution plan. All United Way employees may elect to participate in available plans that fit their individual requirements. Compensation reported includes funding of the defined contribution plan; the estimated increase in actuarial value of the defined benefit plan, key components of the calculation include years of service, salary and employee age; and premiums paid for health insurance.
**Noncash Contributions**

Complete if the organizations answered “Yes” on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

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

<table>
<thead>
<tr>
<th>Name of the organization</th>
<th>Employer identification number</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNITED WAY OF NORTHEAST FLORIDA INC</td>
<td>59-0637825</td>
</tr>
</tbody>
</table>

### Part I  Types of Property

<table>
<thead>
<tr>
<th></th>
<th>(a) Check if applicable</th>
<th>(b) Number of contributions or items contributed</th>
<th>(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g</th>
<th>(d) Method of determining noncash contribution amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Art—Works of art</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Art—Historical treasures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Art—Fractional interests</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Books and publications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Clothing and household goods</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Cars and other vehicles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Boats and planes</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Intellectual property</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Securities—Publicly traded</td>
<td>◐ 10</td>
<td>288,144</td>
<td>Donor pledge</td>
</tr>
<tr>
<td>10</td>
<td>Securities—Closely held stock</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Securities—Partnership, LLC, or trust interests</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Securities—Miscellaneous</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Qualified conservation contribution—Historic structures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Qualified conservation contribution—Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Real estate—Residential</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Real estate—Commercial</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>Real estate—Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>Collectibles</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Food inventory</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>20</td>
<td>Drugs and medical supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Taxidermy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Historical artifacts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Scientific specimens</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Archeological artifacts</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>25</td>
<td>Other ◐ (e)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>Other ◐ (e)</td>
<td></td>
<td></td>
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<tr>
<td>27</td>
<td>Other ◐ (e)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>28</td>
<td>Other ◐ (e)</td>
<td></td>
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</tr>
</tbody>
</table>

30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn’t required to be used for exempt purposes for the entire holding period?  

30b If “Yes,” describe the arrangement in Part II.

31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?

32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?

32b If “Yes,” describe in Part II.

33 If the organization didn’t report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.
Part II  Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Schedule M, Part I, Line 32b - United Way uses several brokers to sell stock. Stock is sold immediately upon receipt.

Schedule M, Part I, Line 33 - Four stock sales occurred between July 1, 2018 and June 30, 2019 that were payments to pledges made and reported as revenue during a previous fiscal year.
Supplemental Information to Form 990 or 990-EZ

Form 990, Part I, Line 1 - Community of opportunity where everyone has hope and can reach their full potential. Because change doesn’t happen alone, United Way’s mission is to solve Northeast Florida’s toughest challenges by connecting people, resources, and ideas. The nonprofit organization’s long tradition of addressing the human-service needs in Duval, Baker, Clay, Nassau, and Northern St. Johns counties is made possible through the commitment of thousands of volunteers, donors, and community partners. To learn more, visit unitedwaynefl.org or follow @unitedwaynefl on Facebook, Twitter, and Instagram. United Way’s strategic priorities are to ensure basic needs are met for all throughout the region; produce meaningful and measurable results in the areas of youth success, financial stability and health; and to invest in historically challenged neighborhoods connecting efforts to impact generational poverty. United Way volunteers carefully review all funded programs, evaluate initiatives, hold United Way and its partners accountable for results and make strategic funding recommendations to continually improve outcomes. As part of its community impact work, United Way leads several initiatives and collaborations to improve community results in education, income, and health: o Success By 6 - provides access to high-quality early learning for hardworking families who would not otherwise be able to afford a strong foundation for their preschool children (ages 3 and 4); offers parent engagement and educational opportunities to increase early childhood development o Achievers For Life - identifies middle school students who are exhibiting the warning signs of dropping out of school and connects them to mentors, counselors, tutors and family advocates to get them back on track to graduation o United Way 2-1-1 - offers 24-hour access to critical resources, and serves as the area’s suicide intervention helpline o Real Sense - increases financial stability of Northeast Florida’s hardworking families through strategies that increase income, knowledge and assets o Full Service Schools - provides therapeutic, health, and social services to students and their families in eight neighborhoods throughout Jacksonville

Form 990, Part VI, Section A, Line 4 - United Way established a volunteer Governance Committee to review and recommend a governance structure to create focus and streamline operations. Following its review the Committee recommended changing from a dual board structure to a single board structure. In addition, it recommended 3 Board Committees and 3 Councils. The operational change was approved and was effective July 1, 2018. United Way’s Articles of Incorporation and bylaws were revised and the Articles filed with the State of Florida.

Form 990, Part VI, Section B, Line 11b - United Way’s Board of Directors established an Audit Committee to assist the Directors in fulfilling its oversight responsibilities. The Audit Committee met with the independent auditors on October 24, 2019. They discussed the audit process; reviewed and accepted the audit; and met in executive session with the audit team. At the January 23, 2020 Board of Directors meeting, the audit and IRS Form 990 was reviewed.

Form 990, Part VI, Section B, Line 12c - Annually all Directors, Audit Committee Members and Staff Members review the conflict of interest policy included in the Code of Ethics and certify they recognize and understand their obligations and disclose any conflicts. Should situations arise during the course of the year, the individual immediately discloses the new situation.

Form 990, Part VI, Section B, Line 15 - Compensation is reviewed and approved with the budget. The most recent national United Way compensation study and local market data are part of the analysis process. In addition organizational growth, strategic direction and individual responsibilities and performance are considered when the President determines annual compensation for each Leadership Team member. The President’s compensation is evaluated and set annually by the Board of Directors.

Form 990, Part VI, Section C, Line 19 - United Way provides governing documents and its conflict of interest policy upon request. Audited financial statements are available on request. Audits for both the June 30, 2019, and June 30, 2018, fiscal years will be posted electronically on United Way’s website www.unitedwaynefl.org.

Form 990, Part X, Line 25 - In keeping with United Way Worldwide’s efforts to increase comparability, consistency and transparency of financial reporting, overhead rates are calculated from IRS Form 990 based on the following formula:

\[ \text{Overhead Rate} = \frac{\text{Column C, M\&G Expense of $1,137,585 + Part IX, Line 25, Column D, Fundraising Expense of $2,078,686}}{\text{Column A, Total Revenue of $21,253,288}} = 15.13\% \]

Form 990, Part XI, Line 9 - Net change between Contributions and pledges designated to agencies of $4,218,230 and Distributions of specific agency designations of $4,949,278, and the net change in the actuarial values of the pension plan of -$231,317.
care coordinator position provides assessment of veteran needs and coordinates area services for veterans and advocates on their behalf as needed. The resource specialist identifies resources available to veterans and further identifies and tracks unmet needs within the community to assist with future planning and program development. Volunteer Engagement - United Way's call to action is to “Live United.” To Live United is being a part of the change—being part of something bigger than ourselves and making a difference in people's lives through gifts of money and time. United Way brings leaders and organizations from all sectors together and we invite them to be a part of the change to help solve community challenges together. Through volunteerism, individuals can connect with their corporate teams or get involved in a committed assignment to impact youth success, financial stability and health in some of our most underserved communities. In 2018-2019, United Way's Volunteer and Community Engagement office generated more than 190 group projects that involved more than 5,900 company volunteers with a total of more than 14,800 logged volunteer hours. With the inclusion of our more than 700 Reading Pals, Achievers for Life mentors and RealSense volunteers, the office logged in close to 75,700 hours of volunteer service.
Second Program Service Accomplishments Description

math standardized test scores. Components include one-on-one weekly mentoring, tutoring, and counseling for students, family support services, as well as parent training to help principals increase families' engagement at school. AFL addresses the challenges associated with keeping students on track for high school graduation. AFL includes a whole school initiative called the Parent Engagement Project that provides innovative opportunities for school staff to involve parents more fully in the academic lives of their students. Since implementing Achievers For Life in 2007, 5556 students and their families have participated in the initiative, and we have consistently measured the results of AFL students. This initiative in collaboration with our impact and community partners has, on average, resulted in promotion rates of 98.5%, attendance rates of 98% and GPAs reaching 2.75 for students who were struggling in school before additional support. In addition, after three years of support Achievers For Life: 83% of students had an A, B, or C in Math; 86% of students had an A, B, or C in English; 98% of students had 2 or fewer school suspensions; and stabilize families - 99% of AFL families did not move, either planned or unplanned, during the school year. Communities In Schools of Jacksonville, Big Brothers Big Sisters of NE FL and Jewish Family and Community Services are United Way's lead partners in implementing this initiative. In May 2009, Achievers For Life was recognized by United Way Worldwide as a best practice in Education Innovation. Michael Ward's $1 million pledge during 2008, Oscar and Cathy Munoz's pledge of $1 million during 2010, Availity's $500,000 pledge in 2011 and FNF's $500,000 pledge in 2012 and $500,000 from the Duval County Public Schools are indicative of donor interest in improving graduation rates through initiatives like Achievers For Life. Achievers For Life was in ten middle schools in Duval County in 2018-19: Arlington, Lakeshore, Mathew Gilbert, Northwestern, JEB Stuart, Jefferson Davis, Eugene Butler, Jean Ribault, Highlands and Joseph Stilwell. *Success By 6 Achievements - A partnership was formed in 2006 to study why preschoolers are not prepared for school. Following 11 months of research, the Success By 6 initiative was developed. Success By 6, a partnership between United Way and the Early Learning Coalition of Duval and the Early Learning Coalition of North Florida, provides two-year scholarships to working families with three-year-old children. The children are placed in high-quality early education centers and receive two years of year-round, full-day education and care. Since Success By 6 began in 2007, 1718 preschoolers have received grants to attend two years of high-quality early learning. Because Success By 6 funding supports the high quality education programming at the centers, more than 2,500 preschoolers benefit each year. The Florida Institute of Education (FIE) at UNF evaluated Success By 6 during the first six years with two standardized tests: the Test of Preschool Early Literacy that evaluates pre-literacy skills, and the Bracken Basic Concept Scale that measures school readiness. The results showed that after two years of high quality early learning: 94% of preschoolers were ready for school compared to 79% ready before participating in Success By 6. ReadingPals Accomplishments - United Way of NE FL is one of 15 Florida United Ways sharing a multi-million dollar grant from Carol & Barney Barnett of Publix Super Markets. The goal is to ensure that more children in our community start kindergarten ready to learn to read. ReadingPals matches volunteers with four year-old VPK students for reading and activities to build oral language skills and vocabulary. In the past four years ReadingPals has served over 1650 children with over 850 volunteers. ReadingPals provided approximately 16,000 books to students and volunteers gave over 10,000 hours of reading time. Traditionally, ReadingPals students start further behind than their peers. In last year's evaluation, Reading Pals students had a 40% increase on Oral Language/Vocabulary assessments from Fall to Spring compared to a 22% increase for Non-ReadingPals students.
provides an array of services to 87 Duval County Schools, with 57,000 students eligible to receive services. An addition, 56,000 students (at 73 Duval County Schools) have access to comprehensive mental health services. Since the creation of the first site in the Andrew Jackson feeder pattern in 1991, Full Service Schools of Jacksonville has grown to eight targeted neighborhoods in Duval County. They are: Arlington Family Resource Center, Beaches Family Resource Center, Englewood Family Resource Center, Greater Springfield Family Resource Center, Historic James Weldon Johnson Family Resource Center, Ribault Family Resource Center, Sandalwood Family Resource Center and Westside Family Resource Center. Services are delivered within the neighborhood and schools to remove the barrier of transportation and are free of charge and include the following: counseling, family therapy, behavior management, substance abuse counseling, parenting classes, medical treatment and follow-up, psychological testing, tutoring, legal consultation, and outside referrals to other agencies. The National Center for School Engagement, conducted an evaluation (2011-12) of Full Service Schools that showed the following results for students who received counseling: 20% improvement in attendance, 32% increase in language arts grades and 31% increase in math grades. Full Service School students were half as likely to be retained two consecutive years compared to students who didn’t participate in counseling but needed it. Results for the 2018-19 school year: 7,617 students were referred for services, 4,689 students were provided medical services, 3,849 students received mental health treatment and 33,462 people were served by Full Service Schools. 98% of students completing counseling demonstrated a measurable increase in overall functioning, and 93% of students were promoted to the next grade level. Statements made by individuals benefitting from the services of Full Service Schools: "The counseling made a difference because if it was up to me, I would have dropped out when I was 18." - High school student who received counseling "My child has made the honor roll, and he has not done that since probably kindergarten." - Parent of student who received counseling
### Other Program Services Accomplishments

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Description</th>
<th>Expense</th>
<th>Grants</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Income/Financial Stability - Combating poverty: Poverty is identified as a root cause of many social ills - violence, substance abuse, depression, and failure in school. One in five children in Northeast Florida lives in poverty. In today's society, simply having a job no longer stops people from being poor. Indeed many hard-working families work multiple jobs to avoid the cycle of poverty, yet the rising costs of basic necessities, coupled with changes in the economy, leave many hard-working individuals struggling to make ends meet. Many are forced to choose between paying bills and buying groceries. United Way's 2018 ALICE report (Asset Limited, Income Constrained, Employed) provides a county-by-county assessment to help us better understand the struggles that low-income households encounter every day. ALICE represents those families who work hard, but due to high living costs and factors often beyond their control, are constantly living paycheck to paycheck. The report indicates that, in Northeast Florida, 40% of the households are below the ALICE level (household survival budget of $56,160 for a family of four), meaning that these families are in constant financial stress just to afford basic household necessities. To address the impact of poverty, United Way invests in programs, such as the RealSense initiative, that promote financial stability and independence. Since 2003, RealSense's mission has been to proactively provide resources to improve the prosperity of our community's most economically-challenged and vulnerable citizens, therefore making our local economy and its citizens stronger. The program is a strategy within United Way's Financial Stability priority goal to ensure that &quot;families are economically stable and self-sufficient.&quot; Through free tax preparation services and financial education workshops, RealSense seeks to stabilize low- to moderate-income working families in Northeast Florida by providing the tools, knowledge, skills and resources needed to succeed. RealSense Achievements - During the 2019 Tax Season, volunteers and seasonal paid staff assisted 23,848 clients in seven counties throughout Northeast Florida with preparing their Federal income taxes, resulting in $25.8 million in total refund dollars returned to our local economy at no cost to the clients. As a result, clients saved an estimated $5 million in preparation fees alone, while $6.9 million in federal EITC funds were funneled into our local economy (an estimated local economic impact of $38 million). RealSense's financial education programs focus on teaching sound money management techniques and creating spending and saving plans for working families, individuals and youth in order to build long-term assets. Collaborating with United Way's partner agencies, RealSense staff and volunteers conduct 15-20 financial education workshops per month at locations across Northeast Florida, thus helping these nonprofit organizations expand the service delivery capacity to their clients and promote the free tax preparation services. In 2018/2019, more than 10,000 participant hours were logged in all our financial education workshops. Surveys completed six months after participating in a RealSense financial education workshop indicate that 34% of participants had decreased their debt thanks to knowledge gained and 65% had developed a written budget.</td>
<td>1,204,008</td>
<td>291,100</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Donor Designations - In addition to funding for all of the aforementioned programs, United Way processed approximately $4.8 million in specific, donor designated funds. For donor convenience, United Way of Northeast Florida enables contributors to direct a portion of their donation to a specific health and human service nonprofit organization with which they are affiliated. In these transactions, United Way acts as an agent that collects, processes, and disburses the funds. It is not a mission-oriented function; consequently United Way does not monitor or require the recipient organizations to provide information relative to the use and results of these contributions.</td>
<td>4,795,936</td>
<td>4,795,936</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td></td>
<td><strong>5,999,944</strong></td>
<td><strong>5,087,036</strong></td>
<td><strong>0</strong></td>
</tr>
</tbody>
</table>