Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No. 1545-0047

2021

Open to Public Inspection

A For the 2021 calendar year, or tax year beginning 01-01-2021 , and ending 12-31-2021

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

C Name of organization
LOCAL 509 SERVICE EMPLOYEES INTERNATIONAL UNION

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
293 BOSTON POST ROAD WEST 4TH FLOO

City or town, state or province, country, and ZIP or foreign postal code
MARLBOROUGH, MA 017524615

D Employer identification number
04-6190454

E Telephone number
(774) 843-7509

G Gross receipts $ 15,228,361

F Name and address of principal officer:
ISRAEL PIERRE
293 BOSTON POST ROAD WEST 4TH FLR
MARLBOROUGH, MA 017524615

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

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

H(c) Group exemption number ▶ 0647

I Tax-exempt status: ☐ 501(c)(3) ☑ 501(c) (5) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW.SEIU509.ORG

K Form of organization: ☐ Corporation ☐ Trust ☐ Association ☑ Other ▶ UNION

L Year of formation: 1961

M State of legal domicile: MA

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
LABOR UNION REPRESENTING, SERVICING AND ORGANIZING MEMBERS

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

3	Number of voting members of the governing body (Part VI, line 1a)	**3**	90
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	90
5	Total number of individuals employed in calendar year 2021 (Part V, line 2a)	**5**	120
6	Total number of volunteers (estimate if necessary)	**6**	0
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	0
b	Net unrelated business taxable income from Form 990-T, Part I, line 11	**7b**	0

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	0	25,000
9	Program service revenue (Part VIII, line 2g)	14,153,125	14,169,215
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	78,023	21,182
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	2,240,566	1,012,964
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	16,471,714	15,228,361
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	0	0
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	8,278,091	8,604,542
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ▶0		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	5,156,453	4,737,978
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	13,434,544	13,342,520
19	Revenue less expenses. Subtract line 18 from line 12	3,037,170	1,885,841

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	11,948,251	14,032,750
21	Total liabilities (Part X, line 26)	1,456,064	1,654,722
22	Net assets or fund balances. Subtract line 21 from line 20	10,492,187	12,378,028

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer — Date: 2022-10-27

ISRAEL PIERRE TREASURER
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
				P01058630

Firm's name ▶ MANZI & ASSOCIATES LLC — Firm's EIN ▶ 04-3508036

Firm's address ▶ 855 TURNPIKE STREET, NORTH ANDOVER, MA 01845 — Phone no. (978) 975-1099

May the IRS discuss this return with the preparer shown above? (see instructions) ☑ **Yes** ☐ **No**

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

LOCAL 509 WAS FORMED TO ORGANIZE AND UNITE ALL WORKERS, ELIGIBLE FOR MEMBERSHIP HEREIN, FOR THEIR MUTUAL ADVANCEMENT, BOTH SOCIALLY AND ECONOMICALLY, ERADICATE DISCRIMINATORY PRACTICES BY EMPLOYERS AND SOCIETY AT LARGE, FOSTER THE VALUE OF PUBLIC COMMITMENT FOR HUMAN SERVICES AND EDUCATION, AND TO PROMOTE AND ENCOURAGE THE INVOLVEMENT OF MEMBERS IN THE POLITICAL PROCESS, INCLUDING ELECTIONS AND OTHER FORMS OF POLITICAL ACTIVITIES.

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 $ including grants of $) (Revenue $)

THE LOCAL PROVIDES SUPPORT FOR ITS MEMBERS THROUGH COLLECTIVE BARGAINING AND GRIEVANCE ASSISTANCE.

4b (Code:) (Expenses $ including grants of $) (Revenue $)

4c (Code:) (Expenses $ including grants of $) (Revenue $)

4d Other program services (Describe in Schedule O.)
(Expenses $ including grants of $) (Revenue $)

4e **Total program service expenses** ▶

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1		No
2	Is the organization required to complete *Schedule B, Schedule of Contributors*? See instructions.	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3	Yes	
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? *If "Yes," complete Schedule C, Part III*	5	Yes	
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D,* Part I	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D,* Part III	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi endowments? *If "Yes," complete Schedule D, Part V*	10		No
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D,* Part VI.	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		No
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	Yes	
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I.* See instructions.	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		No
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21		No

Part IV Checklist of Required Schedules *(continued)*

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

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

				Yes	No
1a	Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	43		
b	Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c		Yes	

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

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	**2a**	120		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.			**2b**	Yes
3a	Did the organization have unrelated business gross income of $1,000 or more during the year?			**3a**	No
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O*			**3b**	
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)?			**4a**	No
b	If "Yes," enter the name of the foreign country: ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			**5a**	No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**	No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**	
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?			**6a**	No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**	
7	**Organizations that may receive deductible contributions under section 170(c).**				
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?			**7a**	No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			**7b**	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			**7c**	No
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**	
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**7f**	
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**	
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			**8**	
9	**Sponsoring organizations maintaining donor advised funds.**				
a	Did the sponsoring organization make any taxable distributions under section 4966?			**9a**	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			**9b**	
10	**Section 501(c)(7) organizations.** Enter:				
a	Initiation fees and capital contributions included on Part VIII, line 12	**10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**			
11	**Section 501(c)(12) organizations.** Enter:				
a	Gross income from members or shareholders	**11a**			
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	**11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	**12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O.			**13a**	
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	**13b**			
c	Enter the amount of reserves on hand	**13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**	No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*			**14b**	
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? If "Yes," see instructions and file Form 4720, Schedule N.			**15**	No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.			**16**	No
17	**Section 501(c)(21) organizations.** Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952, or 4953? If "Yes," complete Form 6069.			**17**	

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

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

Section A. Governing Body and Management

				Yes	No
1a	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.	**1a**	90		
b	Enter the number of voting members included in line 1a, above, who are independent	**1b**	90		
2	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?		**2**		No
3	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?		**3**		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		**4**		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		**5**		No
6	Did the organization have members or stockholders?		**6**	Yes	
7a	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?		**7a**	Yes	
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		**7b**		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a	The governing body?		**8a**	Yes	
b	Each committee with authority to act on behalf of the governing body?		**8b**	Yes	
9	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*		**9**		No

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

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	**10a**	Yes	
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?	**10b**	Yes	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	**11a**	Yes	
b	Describe on Schedule O the process, if any, used by the organization to review this Form 990.			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	**12a**	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	**12b**	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done*	**12c**	Yes	
13	Did the organization have a written whistleblower policy?	**13**		No
14	Did the organization have a written document retention and destruction policy?	**14**	Yes	
15	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?			
a	The organization's CEO, Executive Director, or top management official	**15a**		No
b	Other officers or key employees of the organization	**15b**	Yes	
	If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	**16a**		No
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?	**16b**		

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ▶

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

☐ 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:
▶ISRAEL PIERRE 293 POST ROAD WEST 4TH FLOOR MARLBOROUGH,MA 017524615 (774) 843-7509

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

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

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than $100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(1) ORLANDO PENA PSHS CHAPTER PRESIDENT	1.00	X						102,071	0	47,507
(2) ADRIANA ZWICK DCF CHAPTER PRESIDENT	1.00	X						6,168	0	0
(3) KARA GOODIER JEB RECORDING SECRETARY	1.00	X						4,000	0	0
(4) CHERI ANTELO DTA CHAPTER PRESIDENT	1.00	X						2,750	0	0
(5) CELINA REYES DCF JEB MEMBER	1.00	X						2,750	0	0
(6) EDWARD COTE TRUSTEE	1.00	X						2,500	0	0
(7) CHRISTINE CREAN TRUSTEE	1.00	X						2,500	0	0
(8) JOHN MASLANKA TRUSTEE	1.00	X						2,500	0	0
(9) TINA SIMMERMAN DDS JEB CHAPTER PRESIDENT	1.00	X						2,393	0	0
(10) CASSANDRA SAMPAS DMH JEB CHAPTER PRESIDENT	1.00	X						2,095	0	0
(11) KYLA WILSON HIGHER ED JEB CHAPTER PRESIDENT	1.00	X						1,943	0	0
(12) DAVID FOLEY DOR CHAPTER PRESIDENT	1.00	X						1,678	0	0
(13) JOANNA LAGHETTO DOE JEB CHAPTER PRESIDENT	1.00	X						1,678	0	0
(14) DAVID ZBIKOWSKI MRC CHAPTER PRESIDENT	1.00	X						1,678	0	0
(15) TAIYE ANJORIN DPH CHAPTER PRESIDENT	1.00	X						1,320	0	0
(16) CAROLYN HJELTE MCB CHAPTER PRESIDENT	1.00	X						1,320	0	0
(17) JOHANNA OCHOA DEEC CHAPTER PRESIDENT	1.00	X						1,320	0	0

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
(18) CYNTHIA MECENE-OLIVIER MASSHEALTH CHAPTER PRESIDENT	1.00	X						1,259	0	0
(19) CAROLINE HORTON ELDER SERVICES JEB MEMBER	1.00	X						1,127	0	0
(20) SCOTT ROGERS IST CHAPTER PRESIDENT	1.00	X						1,074	0	0
(21) ELIZABETH LEMONS HIGHER ED CHAPTER PRESIDENT	1.00	X						593	0	0
(22) VALERIE COPELAND MASSHEALTH CHAPTER PRESIDENT	1.00	X						420	0	0
(23) SARAH SLAVICK HIGHER ED JEB MEMBER	1.00	X						250	0	0
(24) AMY MEINERT DOR JEB MEMBER	1.00	X						230	0	0
(25) JENNIFER ROSENLUND PSHS JEB MEMBER	1.00	X						93	0	0
(26) KIMBERLY NADEAU DCF JEB MEMBER	1.00	X						75	0	0
(27) GOODLUCK AKINYOMI PSHS JEB MEMBER	1.00	X						0	0	0
(28) THOMAS ANTHONY DPH JEB MEMBER	1.00	X						0	0	0
(29) JAMES BADGER MCB JEB MEMBER	1.00	X						0	0	0
(30) AMY BANELIS PSHS JEB MEMBER	1.00	X						0	0	0
(31) KAREN BROWN DEEC MEMBER	1.00	X						0	0	0
(32) DESMOND CARTER PSHS JEB MEMBER	1.00	X						0	0	0
(33) PETER CIANCIOLO PSHS JEB MEMBER	1.00	X						0	0	0
(34) BOB COMITO DCF JEB MEMBER	1.00	X						0	0	0
(35) CYNTHIA DAVIS DMH JEB MEMBER	1.00	X						0	0	0
(36) CHARLENE DELGADO DCF JEB MEMBER	1.00	X						0	0	0
(37) JENEZIA DELGADO DOE JEB MEMBER	1.00	X						0	0	0
(38) NORAH DOOLEY HIGHER ED JEB MEMBER	1.00	X						0	0	0
(39) HEIDI FREEMAN MRC JEB MEMBER	1.00	X						0	0	0
(40) MARK GALLAGHER PSHS JEB MEMBER	1.00	X						0	0	0
(41) SHERRIE GAMMAGE-PATT HIGHER ED JEB MEMBER	1.00	X						0	0	0
(42) TIFFANY GOFFER-FITZ DDS JEB MEMBER	1.00	X						0	0	0
(43) DIA GREEN PSHS JEB MEMBER	1.00	X						0	0	0
(44) ALISON JULIAN DDS JEB MEMBER	1.00	X						0	0	0
(45) NINA KAMMERER HIGHER ED JEB MEMBER	1.00	X						0	0	0
(46) JAYNELLE LANDY PSHS JEB MEMBER	1.00	X						0	0	0
(47) THOMASINA LEVESQUE PSHS JEB MEMBER	1.00	X						0	0	0
(48) NOEL LOZADA PSHS JEB MEMBER	1.00	X						0	0	0
(49) JENNIFER MALONSON DESE JEB MEMBER	1.00	X						0	0	0
(50) MARITZA MANRIQUE RIVERA FCC JEB MEMBER	1.00	X						0	0	0
(51) DENISSE MARTINEZ-PENA MRC JEB MEMBER	1.00	X						0	0	0
(52) FATIMA MATEO-BELL FCC JEB MEMBER	1.00	X						0	0	0
(53) EDITA MENDOZA FCC JEB MEMBER	1.00	X						0	0	0
(54) CARLOS MOREL FCC JEB MEMBER	1.00	X						0	0	0
(55) GODFREY MPANGA PSHS JEB MEMBER	1.00	X						0	0	0
(56) REYNARDO NAZARIO DCF JEB MEMBER	1.00	X						0	0	0
(57) PETER NORTH DMH JEB MEMBER	1.00	X						0	0	0
(58) SHEELAGH O'CONNOR DMH JEB MEMBER	1.00	X						0	0	0
(59) ARASH PAZOOKI PSHS JEB MEMBER	1.00	X						0	0	0
(60) CAROL PURICELLI DDS JEB MEMBER	1.00	X						0	0	0
(61) KEYLA RUSSO DOR JEB MEMBER	1.00	X						0	0	0
(62) ELIZABETH SANZONE IST JEB MEMBER	1.00	X						0	0	0
(63) AMY SAUNDERS PSHS JEB MEMBER	1.00	X						0	0	0
(64) STANLEY TARASKA DDS JEB MEMBER	1.00	X						0	0	0
(65) PATRISHA TOXEY DCF JEB MEMBER	1.00	X						0	0	0
(66) PETER WACHIRIA PSHS JEB MEMBER	1.00	X						0	0	0
(67) JOCELYN WENDER-SHOBU DMH JEB MEMBER	1.00	X						0	0	0
(68) LAURIE WESMAN DCF JEB MEMBER	1.00	X						0	0	0
(69) MAURICE AUSTIN PSHS JEB MEMBER	1.00	X						0	0	0
(70) KAREN BAXTER DOR JEB MEMBER	1.00	X						0	0	0
(71) EDWARD BEECHER DDS JEB MEMBER	1.00	X						0	0	0
(72) CAROL BUTLER MASSHEALTH CHAPTER VP	1.00	X						0	0	0
(73) KIMBERLY D'ERRICO DCF JEB MEMBER	1.00	X						0	0	0
(74) ROBERT DELGER DCF RECORDING SECRETARY	1.00	X						0	0	0
(75) KLEINERSEN DEVENICCI DDS JEB MEMBER	1.00	X						0	0	0
(76) JEREMY KENT DCF JEB MEMBER	1.00	X						0	0	0
(77) PETER LERT HIGHER ED JEB MEMBER	1.00	X						0	0	0
(78) PAUL MCAULIFFE DOC JEB MEMBER	1.00	X						0	0	0
(79) MISSY MOJICA DCF JEB MEMBER	1.00	X						0	0	0
(80) JOYCE NORTH ELDER SERVICES JEB MEMBER	1.00	X						0	0	0
(81) ANNE OSULA FCC JEB MEMBER	1.00	X						0	0	0
(82) RICHARD PARKER MRC JEB MEMBER	1.00	X						0	0	0
(83) VICKY POULOS DOC JEB MEMBER	1.00	X						0	0	0
(84) DORYCE SMITH DOE JEB MEMBER	1.00	X						0	0	0
(85) JEREMY WEILAND DMH JEB MEMBER	1.00	X						0	0	0
(86) ANTHONY XATSE PSHS CHAPTER VP	1.00	X						0	0	0
(87) MARY XATSE PSHS JEB MEMBER	1.00	X						0	0	0
(88) BRIAN MORRISON DMH JEB MEMBER	1.00	X						0	0	0
(89) PETER MACKINNON PRESIDENT	40.00			X				128,175	0	51,310
(90) ISRAEL PIERRE TREASURER	40.00			X				113,626	0	42,152
1b Sub-Total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								387,586	0	140,969

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 3

		Yes	No
3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	**3**		No
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
PYLE ROME EHRENBERG PC 2 LIBERTY SQUARE 10TH FLOOR BOSTON, MA 02109	LEGAL	511,000

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 1

Part VIII Statement of Revenue

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

	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants, and OtherAmt Similar Amounts				
1a Federated campaigns . . 1a				
b Membership dues . . 1b				
c Fundraising events . . 1c				
d Related organizations 1d				
e Government grants (contributions) 1e				
f All other contributions, gifts, grants, and similar amounts not included above 1f	25,000			
g Noncash contributions included in lines 1a - 1f:$ 1g				
h **Total.** Add lines 1a-1f . . . . . ▶	25,000			
Program Service Revenue — Business Code				
2a PROGRAM SERVICE REVENUE 900099	14,169,215	14,169,215		
b				
c				
d				
e				
f All other program service revenue.				
g **Total.** Add lines 2a–2f. . . . . ▶ 14,169,215				
3 Investment income (including dividends, interest, and other similar amounts)	21,182			21,182
4 Income from investment of tax-exempt bond proceeds ▶				
5 Royalties . . . . . ▶				
(i) Real / (ii) Personal				
6a Gross rents 6a				
b Less: rental expenses 6b				
c Rental income or (loss) 6c				
d Net rental income or (loss)				
(i) Securities / (ii) Other ▶				
7a Gross amount from sales of assets other than inventory 7a				
b Less: cost or other basis and sales expenses 7b				
c Gain or (loss) 7c				
d Net gain or (loss) . . . . . ▶				
8a Gross income from fundraising events (not including $ _____ of contributions reported on line 1c). See Part IV, line 18 . . . . 8a				
b Less: direct expenses 8b				
c Net income or (loss) from fundraising events . . ▶				
9a Gross income from gaming activities. See Part IV, line 19 . . . 9a				
b Less: direct expenses 9b				
c Net income or (loss) from gaming activities . . ▶				
10a Gross sales of inventory, less returns and allowances . . 10a				
b Less: cost of goods sold . . 10b				
c Net income or (loss) from sales of inventory . . ▶				
Miscellaneous Revenue — Business Code				
11a MA DEPT OF EARLY EDUCATION 900099	1,000,000	1,000,000		
b MISCELLANEOUS INCOME 900099	12,964	12,964		
c				
d All other revenue				
e **Total.** Add lines 11a–11d . . . . . ▶	1,012,964			
12 **Total revenue.** See instructions . . . . . ▶	15,228,361	15,182,179	0	21,182

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16.				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	387,586			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	5,041,089			
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	1,068,174			
9 Other employee benefits	1,597,572			
10 Payroll taxes	510,121			
11 Fees for services (non-employees):				
a Management				
b Legal	573,435			
c Accounting	75,000			
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	115,457			
12 Advertising and promotion				
13 Office expenses	186,193			
14 Information technology				
15 Royalties				
16 Occupancy	491,744			
17 Travel	25,228			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	33,519			
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	140,672			
23 Insurance	66,442			
24 Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a PER CAPITA	2,525,933			
b TELEPHONE	117,562			
c COPE EXPENSE	101,529			
d DONATIONS	69,776			
e All other expenses	215,488			
25 **Total functional expenses.** Add lines 1 through 24e	13,342,520			
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ▶ ☐ if following SOP 98-2 (ASC 958-720).				

Part X Balance Sheet

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

				(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing		10,371	1	10,114
	2	Savings and temporary cash investments		9,741,776	2	12,654,029
	3	Pledges and grants receivable, net			3	
	4	Accounts receivable, net		718,334	4	418,213
	5	Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges		270,986	9	286,953
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 1,402,392			
	b	Less: accumulated depreciation	10b 908,797	625,648	10c	493,595
	11	Investments—publicly traded securities		469,829	11	
	12	Investments—other securities. See Part IV, line 11			12	
	13	Investments—program-related. See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets. See Part IV, line 11		111,307	15	169,846
	16	**Total assets.** Add lines 1 through 15 (must equal line 33)		11,948,251	16	14,032,750
Liabilities	17	Accounts payable and accrued expenses		1,288,340	17	1,425,641
	18	Grants payable			18	
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D			21	
	22	Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons			22	
	23	Secured mortgages and notes payable to unrelated third parties			23	
	24	Unsecured notes and loans payable to unrelated third parties			24	
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24). Complete Part X of Schedule D		167,724	25	229,081
	26	**Total liabilities.** Add lines 17 through 25		1,456,064	26	1,654,722
Net Assets or Fund Balances		**Organizations that follow FASB ASC 958, check here ▶ ☑ and complete lines 27, 28, 32, and 33.**				
	27	Net assets without donor restrictions		7,769,946	27	8,663,484
	28	Net assets with donor restrictions		2,722,241	28	3,714,544
		Organizations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 29 through 33.				
	29	Capital stock or trust principal, or current funds			29	
	30	Paid-in or capital surplus, or land, building or equipment fund			30	
	31	Retained earnings, endowment, accumulated income, or other funds			31	
	32	Total net assets or fund balances		10,492,187	32	12,378,028
	33	Total liabilities and net assets/fund balances		11,948,251	33	14,032,750

Part XI Reconcilliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	15,228,361
2	Total expenses (must equal Part IX, column (A), line 25)	2	13,342,520
3	Revenue less expenses. Subtract line 2 from line 1	3	1,885,841
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	10,492,187
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	0
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column	10	12,378,028

Part XII Financial Statements and Reporting

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

			Yes	No
1	Accounting method used to prepare the Form 990: ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.	3b		

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE C (Form 990)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ **Complete if the organization is described below. ▶Attach to Form 990 or Form 990-EZ.**
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No. 1545-0047

2021

Open to Public Inspection

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

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

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

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

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

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

Name of the organization	Employer identification number
MASSACHUSETTS TEACHERS ASSOCIATION, INC.	04-6105644

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

1	Provide a description of the organization's direct and indirect political campaign activities in Part IV. See instructions for definition of "political campaign activities."		
2	Political campaign activity expenditures. See instructions ... ▶	$	
3	Volunteer hours for political campaign activities. See instructions ... ▶		

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

1	Enter the amount of any excise tax incurred by the organization under section 4955 ...	$	
2	Enter the amount of any excise tax incurred by organization managers under section 4955 ...	$	
3	If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ...		Yes No

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

b If "Yes," describe in Part IV.

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

1	Enter the amount directly expended by the filing organization for section 527 exempt function activities ...	$	
2	Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ...	$	
3	Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ...	$	
4	Did the filing organization file **Form 1120-POL** for this year? ...		Yes No

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

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization's funds. If none, enter -0-.
(1) COMMITTEE TO ELECT BRYAN BARASH	PO BOX 600203 NEWTONVILLE,MA 02460		500	
(2) COMMITTEE TO ELECT KAREN SPILKA	25 AMHERST ROAD HOPKINTON,MA 01748		500	
(3) COMMITTEE TO ELECT JAMES O'DAY	41 WINTHROP STREET WEST BOYLSTON,MA 01583		500	
(4) COMMITTEE TO ELECT RON MARINO	PO BOX 690344 QUINCY,MA 02269		500	
(5) COMMITTEE TO ELECT AARON MICHLEWITZ	99 FULTON STREET APT 6-4 BOSTON,MA 02109		500	
(6) COMMITTEE TO ELECT MICHAEL RODRIGUES	14 MASSON STREET WESTPORT,MA 02790		500	
(7) COMMITTEE TO ELECT JAMES ELKEDGE	PO BOX 641 ACTON,MA 01720		500	
(8) COMMITTEE TO ELECT JUAN JARABELLO	15 FATHER JACOBER ROAD 425 BOSTON,MA 02128		500	
(9) COMMITTEE TO ELECT SEAN GARBALLEY	45 HAYWARD STREET ARLINGTON,MA 02474		500	
(10) COMMITTEE TO ELECT TRAM NGUYEN	PO BOX 216 ANDOVER,MA 01810		500	
(11) COMMITTEE TO ELECT RUTH BALSER	36 AUDUBON DRIVE CHESTNUT HILL,MA 02467		500	
(12) COMMITTEE TO ELECT MATT MCLAUGHLIN	PO BOX 45195 SOMERVILLE,MA 02145		500	
(13) COMMITTEE TO ELECT FRANK MORAN	38 DARTMOUTH STREET LAWRENCE,MA 01841		500	
(14) COMMITTEE TO ELECT THOMAS GOLDEN	24 MUNROE STREET LOWELL,MA 01850		500	
(15) COMMITTEE TO ELECT NATALIE HIGGINS	41 LEXINGTON CIRCLE LEOMINSTER,MA 01453		500	
(16) COMMITTEE TO ELECT MARJORIE DECKER	PO BOX 390431 CAMBRIDGE,MA 02141		500	
(17) COMMITTEE TO ELECT ADRIAN MADARO	137 LEWIS WHARF BOSTON,MA 02110		500	
(18) COMMITTEE TO ELECT CAROL LARIVIERE	125 HIGHLAND STREET 404 TAUNTON,MA 02780		500	
(19) COMMITTEE TO ELECT ADAM GOMEZ	32 HAMPDEN STREET SPRINGFIELD,MA 01103		500	
(20) COMMITTEE TO ELECT ORLANDO RAMOS	PO BOX 51667 INDIAN ORCHARD,MA 01151		500	
(21) COMMITTEE TO ELECT BRIAN CASTELLANOS	693 WESTERN AVE UNIT 402 LYNN,MA 01905		500	
(22) COMMITTEE TO ELECT JOSHUA ALBA	300 METHEUN STREET APT 428 LAWRENCE,MA 01841		500	
(23) COMMITTEE TO ELECT HONG NET	20 HOLYOKE STREET LYNN,MA 01905		500	
(24) COMMITTEE TO ELECT BRENDAN CREIGHTON	9 PURDON AVE LYNN,MA 01905		250	
(25) COMMITTEE TO ELECT JYNAI MCDONALD	28 SYCAMORE STREET SPRINGFIELD,MA 01109		500	
(26) COMMITTEE TO ELECT BARRY SANDERS	7 BRAEMORE ROAD TAUNTON,MA 02780		500	
(27) COMMITTEE TO ELECT PAUL FEENEY	PO BOX 15 BOSTON,MA 02137		250	
(28) COMMITTEE TO ELECT JERRAINE JOHNSON	36 ZENITH DRIVE WORCESTER,MA 01602		500	
(29) COMMITTEE TO ELECT JAMES IANNONE	485 LOCUST STREET ATTLEBORO,MA 02703		500	
(30) COMMITTEE TO ELECT JESSICA GIANNINO	14 SIGOURNEY STREET REVERE,MA 02151		500	
(31) COMMITTEE TO ELECT KEN GORDON	PO BOX 159 BURLINGTON,MA 01830		500	
(32) COMMITTEE TO ELECT MEGHAN KILLOURHY	PO BOX 994 CLINTON,MA 01510		100	
(33) COMMITTEE TO ELECT JASON LEWIS	PO BOX 253 WINCHESTER,MA 01890		250	
(34) COMMITTEE TO ELECT PETE WHITE	239 JASON STREET PITTSFIELD,MA 01201		500	
(35) COMMITTEE TO ELECT DENISE GARLICK	67 CLARKE ROAD NEEDHAM,MA 02492		500	
(36) COMMITTEE TO ELECT PAT JEHLEN	PO BOX 15 BOSTON,MA 02137		750	
(37) COMMITTEE TO ELECT KHRYSTIAN KING	4 AUTUMN STREET WORCESTER,MA 01603		500	
(38) COMMITTEE TO ELECT CHYNAH TYLER	13 S JUNIOR TER C QUINCY,MA 02169		250	
(39) COMMITTEE TO ELECT DEB GOLDBERG	PO BOX 15 BOSTON,MA 02137		500	
(40) COMMITTEE TO ELECT JAKE OLIVEIRA	PO BOX 307 LUDLOW,MA 01056		500	
(41) COMMITTEE TO ELECT CELINA REYES	140 ABBOTT STREET LAWRENCE,MA 018431806		500	
(42) COMMITTEE TO ELECT REBECCA RAUCH	PO BOX 920527 NEEDHAM,MA 02492		250	
(43) COMMITTEE TO ELECT REBECCA SHANGRAW	102 COMMERCIAL STREET WEYMOUTH,MA 02188		500	
(44) COMMITTEE TO ELECT KATE HOGAN	36 HASTINGS STREET STOW,MA 01775		500	
(45) COMMITTEE TO ELECT JOHN CRONIN	60 HILLSIDE DRIVE LUNENBURG,MA 01462		500	
(46) COMMITTEE TO ELECT CARLOS GONZALEZ	48 DOVER STREET SPRINGFIELD,MA 01103		500	
(47) COMMITTEE TO ELECT MIKE MORAN	67 BURTON STREET ALLSTON,MA 02134		500	
(48) COMMITTEE TO ELECT MAURA HEALEY	PO BOX 15 BOSTON,MA 02137		500	
(49) COMMITTEE TO ELECT ANDRES VARGAS	92 PERKINS CT HAVERHILL,MA 01832		500	
(50) COMMITTEE TO ELECT DANIEL DONAHUE	39 FORSBERG STREET WORCESTER,MA 01607		500	
(51) COMMITTEE TO ELECT TED PHILLIPS	3 GARDEN STREET SHARON,MA 02067		500	
(52) COMMITTEE TO ELECT TRICIA FARLEY BOUVIER	155 ELEANOR ROAD PITTSFIELD,MA 01201		500	
(53) COMMITTEE TO ELECT JOSH CUTLER	PO BOX 2775 DUXBURY,MA 02331		500	
(54) COMMITTEE TO ELECT BRANDY COMLEY	94 SYDNEY STREET BOSTON,MA 02125		100	
(55) COMMITTEE TO ELECT SUSAN MORAN	PO BOX 1065 NORTH FALMOUTH,MA 02556		500	
(56) COMMITTEE TO ELECT MARC PACHECO	7 DARTMOUTH STREET TAUNTON,MA 02780		500	
(57) COMMITTEE TO ELECT LAURA CLANCY	2 WESTPORT CIRCLE WORCESTER,MA 01605		500	
(58) COMMITTEE TO ELECT KATE LIPPER-GARABEDIAN	21 MYSTIC AVENUE MELROSE,MA 02176		500	
(59) COMMITTEE TO ELECT SAM PERLMAN	11 BELMONT STREET 1 MARLBOROUGH,MA 01752		100	
(60) COMMITTEE TO ELECT JONATHAN HAL	168 CHESTNUT STREET WALTHAM,MA 02453		500	
(61) COMMITTEE TO ELECT ENDI LOPEZ	45 CAROL STREET CHELSEA,MA 02150		500	
(62) COMMITTEE TO ELECT DAMALY VIDAL ROSA	140 HIGHLAND STREET CHELSEA,MA 02150		100	
(63) COMMITTEE TO ELECT ROBERTO JIMENEZ KUHNE	40 ELEANOR STREET CHELSEA,MA 02150		500	
(64) COMMITTEE TO ELECT GERLY ADRIEN	15 CUMBERLAND STREET EVERETT,MA 02149		500	
(65) COMMITTEE TO ELECT BRIAN LAPIERRE	2 RAND STREET LYNN,MA 01904		500	
(66) COMMITTEE TO ELECT JOHN DRUNKWATER	222 REMINGTON STREET LOWELL,MA 01852		500	
(67) COMMITTEE TO ELECT PHIL DUARTE	208 SCADDING STREET TAUNTON,MA 02780		250	
(68) COMMITTEE TO ELECT BRANDON ROBBINS	225 LEGATE HILL ROAD LEOMINSTER,MA 01453		500	
(69) COMMITTEE TO ELECT JOESIAH GONZALEZ	122 MASSASOIT STREET SPRINGFIELD,MA 011071722		500	
(70) COMMITTEE TO ELECT LIZ BRADDON	33 CHAMPNEY STREET BRIGHTON,MA 02135		500	
(71) COMMITTEE TO ELECT JULIA MEJIA	344 TALBOT AVENUE BOSTON,MA 022342502		500	
(72) COMMITTEE TO ELECT TANIA ANDERSON	99 HARRISON STREET BOSTON,MA 02121		500	
(73) COMMITTEE TO ELECT SEAN ROSE	14 DUBSEL DRIVE WORCESTER,MA 01609		500	
(74) COMMITTEE TO ELECT ISABELLA ALENA	24 BEACON STREET ROOM 39 BOSTON,MA 02133		500	
(75) COMMITTEE TO ELECT KENZIE BOK	53 PICKNEY STREET BOSTON,MA 02114		500	
(76) COMMITTEE TO ELECT THU NGUYEN	28 COLUMBIA STREET APT 3L WORCESTER,MA 016044300		500	
(77) COMMITTEE TO ELECT RUTHZEE LOUISSAINT	PO BOX 190739 BOSTON,MA 02119		500	
(78) COMMITTEE TO ELECT JACQUELINE CHAVEZ	39 BRYANT STREET 1 REVERE,MA 02151		500	
(79) COMMITTEE TO ELECT EDWARD FLYNN	254 GOLD STREET SOUTH BOSTON,MA 02127		100	
(80) COMMITTEE TO ELECT LYDIA EDWARD	PO BOX 15 BOSTON,MA 02137		100	
(81) COMMITTEE TO ELECT KENDRA HICKS	161 S HUNTINGTON JAMAICA PLAIN,MA 02130		500	
(82) COMMITTEE TO ELECT JEOVANNY SOSA	24 BISHOP STREET LOWELL,MA 01852		100	
(83) COMMITTEE TO ELECT KEVIN HONAN	192 FANEUIL STREET BOSTON,MA 02135		500	
(84) COMMITTEE TO ELECT ETEL HAHASI	62 CLARK STREET WORCESTER,MA 01606		500	
(85) COMMITTEE TO ELECT AYANNA CRAWFORD	25 HUTCHINSON STREET SPRINGFIELD,MA 01119		500	
(86) COMMITTEE TO ELECT SARAI RIVERA	PO BOX 10722 WORCESTER,MA 01603		500	
(87) COMMITTEE TO ELECT MARIA DE LA CRUZ	24 SUMMIT AVENUE LAWRENCE,MA 01841		100	
(88) COMMITTEE TO ELECT RICARDO ARROYO	PO BOX 365493 BOSTON,MA 02136		250	
(89) COMMITTEE TO ELECT ESTELA REYES	84 MAPLE STREET LAWRENCE,MA 01841		500	
(90) COMMITTEE TO ELECT ANDREA FREEMAN	431 PLEASANT STREET LEOMINSTER,MA 01453		500	
(91) COMMITTEE TO ELECT LIZ MIRANDA	100 HEARD STREET APT 546 CHELSEA,MA 02150		500	
(92) COMMITTEE TO ELECT JONATHAN ZLOTNIK	86 CHELSEA STREET GARDNER,MA 01440		500	
(93) COMMITTEE TO ELECT TOM STANLEY	PO BOX 15 BOSTON,MA 02137		500	
(94) COMMITTEE TO ELECT PAUL MARK	PO BOX 2996 PITTSFIELD,MA 01202		500	
(95) COMMITTEE TO ELECT CHRISTINE BARRY	71 NEWBURY STREET SOMERVILLE,MA 02144		250	
(96) COMMITTEE TO ELECT MICHELLE WU	PO BOX 960782 BOSTON,MA 02196		500	
(97) COMMITTEE TO ELECT SHIRLEY ARANDA	205 LAMBERT TER UNIT 36 CHICOPEE,MA 01020		500	
(98) COMMITTEE TO ELECT JOSHUA GARCIA	14 LAUREL STREET ROOM 2 HOLYOKE,MA 01040		500	
(99) COMMITTEE TO ELECT KATHERYN MARTINI	34 GLENBROOK DRIVE GREENFIELD,MA 01301		500	
(100) COMMITTEE TO ELECT JOHN MAHONEY	138 NEWTON AVENUE WORCESTER,MA 01609		250	
(101) COMMITTEE TO ELECT CARLA MONTEIRO	480 HARVARD STREET 2 DORCHESTER,MA 02124		500	
(102) COMMITTEE TO ELECT EVANDRO CARVALHO	PO BOX 220487 DORCHESTER,MA 02122		500	
(103) COMMITTEE TO ELECT JOHN VELIS	PO BOX 2328 WESTFIELD,MA 01086		500	
(104) COMMITTEE TO ELECT WILFRED MBAH	12C WARWICK STREET SOMERVILLE,MA 02145		500	
(105) COMMITTEE TO ELECT DAVID LEBOEUF	PO BOX 30741 WORCESTER,MA 01603		500	
(106) COMMITTEE TO ELECT JON SANTIAGO	806 TREMONT STREET 6 BOSTON,MA 02118		250	
(107) COMMITTEE TO ELECT JARED NICHOLSON	19 MERRILL AVE LYNN,MA 01902		500	
(108) COMMITTEE TO ELECT LYDIA EDWARDS	PO BOX 15 BOSTON,MA 02137		400	
(109) COMMITTEE TO ELECT PAUL TUCKER	72 WASHINGTON SQUARE SALEM,MA 01970		500	
(110) COMMITTEE TO ELECT KENDRYS VASQUEZ	681 LOWELL STREET LAWRENCE,MA 01841		500	
(111) COMMITTEE TO ELECT PATRICK O'CONNOR	10 PATRIOT PARKWAY WEYMOUTH,MA 02190		250	
(112) COMMITTEE TO ELECT TACKEY CHAN	24 BEACON STREET ROOM 42 BOSTON,MA 02133		500	
(113) COMMITTEE TO ELECT BUD WILLIAMS	155 OVERLOOK DRIVE SPRINGFIELD,MA 011181121		500	
(114) COMMITTEE TO ELECT JOHN KEENAN	37 HOBOMACK ROAD QUINCY,MA 02169		500	
(115) COMMITTEE TO ELECT MIKE KUSHMEREK	339 RUSSELL STREET FITCHBURG,MA 01420		500	
(116) COMMITTEE TO ELECT PAUL DONATO	48 MAURICE STREET MEDFORD,MA 02155		500	
(117) COMMITTEE TO ELECT SAL N DIDOMENICO	137 LEWIS WHARF BOSTON,MA 02110		500	
(118) COMMITTEE TO ELECT DANIELLE GREGOIRE	173 GREENWOOD STREET MARLBOROUGH,MA 01752		500	
(119) COMMITTEE TO ELECT JOAN MESCHINO	PO BOX 523 HULL,MA 02045		500	
(120) COMMITTEE TO ELECT JOAN LOVELY	14 STORY STREET SALEM,MA 01970		500	
(121) COMMITTEE TO ELECT ANN-GLOUCESTER,MA 01930 GIOVANNI	11 J/2 PROCTOR STREET		250	
(122) COMMITTEE TO ELECT STEVE OWENS	45 WINSOR AVENUE WATERTOWN,MA 02472		100	
(123) WORCESTER DEMOCRATIC CITY COMMITTEE	224 HOLDEN STREET WORCESTER,MA 01605		1,000	
(124) JIM MCGOVERN MA PAC	PO BOX 60405 WORCESTER,MA 01606		500	
(125) JUSTIN HURST FOR CITY COUNCIL	1764 PARKER STREET SPRINGFIELD,MA 01103		500	
(126) MICHAEL FENTON FOR CITY COUNCIL	90 EDGEWOOD STREET SPRINGFIELD,MA 01118		500	
(127) BRI NICHOLS FOR CITY COUNCIL	16 BUNKER AVENUE BROCKTON,MA 02301		500	
(128) JESSIS LEDERMAN FOR CITY COUNCIL	235 STATE STREET APT 116 SPRINGFIELD,MA 01103		100	
(129) GEORGE RUSSELL FOR CITY COUNCIL	1250 GRAFTON STREET WORCESTER,MA 016044300		500	
(130) JOE PETTY FOR MAYOR	21 DOGWOOD CIRCLE HOLDEN,MA 01520		500	
(131) JESSE CLINGAN FOR CITY COUNCIL	36 MARSHALL STREET SOMERVILLE,MA 02145		500	
(132) MARVEN-KHADE HYPPOLITE FOR CONGRESS	9 PARKER AVENUE LYNN,MA 01902		500	
(133) ZAIDA GOVAN FOR CITY COUNCIL	235 STATE STREET APT 116 SPRINGFIELD,MA 01103		500	
(134) TARR COMMITTEE	97 HESPERUS AVENUE GLOUCESTER,MA 01930		500	

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

A Check ▶ ☐ if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).

B Check ▶ ☐ if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)	(a) Filing organization's totals	(b) Affiliated group totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		
b Total lobbying expenditures to influence a legislative body (direct lobbying)		
c Total lobbying expenditures (add lines 1a and 1b)		
d Other exempt purpose expenditures		
e Total exempt purpose expenditures (add lines 1c and 1d)		
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		

If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:
Not over $500,000	20% of the amount on line 1e.
Over $500,000 but not over $1,000,000	$100,000 plus 15% of the excess over $500,000.
Over $1,000,000 but not over $1,500,000	$175,000 plus 10% of the excess over $1,000,000.
Over $1,500,000 but not over $17,000,000	$225,000 plus 5% of the excess over $1,500,000.
Over $17,000,000	$1,000,000.

g Grassroots nontaxable amount (enter 25% of line 1f)		
h Subtract line 1g from line 1a. If zero or less, enter -0-.		
i Subtract line 1f from line 1c. If zero or less, enter -0-.		

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? ☐ **Yes** ☐ **No**

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period

Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

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

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

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

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

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

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

Part IV Supplemental Information

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

Return Reference	Explanation
PART I-A, LINE 1	THE LOCAL MADE CONTRIBUTIONS TO CANDIDATES FOR PUBLIC OFFICE FROM THE COPE FUNDS AT THE LOCAL AND STATE LEVEL IN AMOUNTS RANGING FROM $100-$500 BASED UPON THE RECOMMENDATIONS OF THE COMMITTEE ON POLITICAL EDUCATION. THE LOCAL ALSO MADE A DIRECT CONTRIBUTION TO ONE POLITICAL ACTION COMMITTEE AT THE LOCAL AND STATE LEVEL FOR $1,000.

Additional Data

Return to Form

Software ID:

Software Version:

SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
▶ **Attach to Form 990.**
▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
LOCAL 509 SERVICE EMPLOYEES INTERNATIONAL UNION

Employer identification number
04-6190454

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

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

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate value of contributions to (during year)		
3	Aggregate value of grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements.

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).

☐ Preservation of land for public use (e.g., recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

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

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

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

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

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

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

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

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

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

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

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

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):

- **a** ☐ Public exhibition
- **b** ☐ Scholarly research
- **c** ☐ Preservation for future generations
- **d** ☐ Loan or exchange programs
- **e** ☐ Other .....

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?. . . ☐ **Yes** ☐ **No**

Part IV Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? . . . . . ☐ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIII and complete the following table:

		Amount
c	Beginning balance	**1c**
d	Additions during the year	**1d**
e	Distributions during the year	**1e**
f	Ending balance	**1f**

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☐ **Yes** ☐ **No**

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII . . . . ☐

Part V Endowment Funds.

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

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

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

- **a** Board designated or quasi-endowment ▶ .....
- **b** Permanent endowment ▶ .....
- **c** Term endowment ▶ .....

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) Unrelated organizations . . . . . **3a(i)**		
(ii) Related organizations . . . . . **3a(ii)**		

b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R? **3b**

4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment.

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

Description of property	**(a)** Cost or other basis (investment)	**(b)** Cost or other basis (other)	**(c)** Accumulated depreciation	**(d)** Book value
1a Land				
b Buildings				
c Leasehold improvements		759,028	376,526	382,502
d Equipment		403,966	308,076	95,890
e Other		239,398	224,195	15,203
Total. Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, column (B), line 10(c).)* . . ▶				493,595

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

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

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

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

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

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

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col.(B) line 25.)* ▶	229,081

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

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

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

1	Total revenue, gains, and other support per audited financial statements			1	15,228,361
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0
3	Subtract line **2e** from line **1**			3	15,228,361
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**:				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total revenue. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12.)			5	15,228,361

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

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

1	Total expenses and losses per audited financial statements			1	13,342,520
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII.)	2d			
e	Add lines **2a** through **2d**			2e	0
3	Subtract line **2e** from line **1**			3	13,342,520
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII.)	4b			
c	Add lines **4a** and **4b**			4c	0
5	Total expenses. Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18.)			5	13,342,520

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation
PART X, LINE 2:	THE INTERNAL REVENUE SERVICE HAS DETERMINED THE LOCAL IS EXEMPT FROM FEDERAL INCOME TAXES UNDER SECTION 501(C)(5) OF THE INTERNAL REVENUE CODE. ACCORDINGLY, NO PROVISION OR LIABILITY FOR FEDERAL INCOME TAXES HAS BEEN INCLUDED IN THE ACCOMPANYING FINANCIAL STATEMENTS. THE LOCAL BELIEVES THAT IT CONTINUES TO QUALIFY AND TO OPERATE IN ACCORDANCE WITH APPLICABLE PROVISIONS OF THE INTERNAL REVENUE CODE. ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA REQUIRE MANAGEMENT TO EVALUATE TAX POSITIONS TAKEN BY THE LOCAL AND RECOGNIZE A TAX LIABILITY (OR ASSET) IF THE LOCAL HAS TAKEN AN UNCERTAIN POSITION THAT MORE LIKELY THAN NOT WOULD NOT BE SUSTAINED UPON EXAMINATION BY THE DEPARTMENT OF LABOR AND INTERNAL REVENUE SERVICE. MANAGEMENT HAS ANALYZED THE TAX POSITIONS TAKEN BY THE LOCAL, AND HAS CONCLUDED THAT AS OF DECEMBER 31, 2021, THERE ARE NO UNCERTAIN POSITIONS TAKEN OR EXPECTED TO BE TAKEN THAT WOULD REQUIRED RECOGNITION OF A LIABILITY (OR ASSET) OR DISCLOSURE IN THE FINANCIAL STATEMENTS. THE LOCAL IS SUBJECT TO ROUTINE AUDITS BY TAXING JURISDICTIONSL; HOWEVER, THERE ARE CURRENTLY NO AUDITS FOR ANY TAX PERIODS IN PROGRESS.

Additional Data

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Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

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 for instructions and the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
LOCAL 509 SERVICE EMPLOYEES INTERNATIONAL UNION

Employer identification number
04-6190454

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate 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.			
	☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
	☐ Travel for companions	☐ Payments for business use of personal residence		
	☐ Tax idemnification and gross-up payments	☐ Health or social club dues or initiation fees		
	☑ Discretionary spending account	☐ Personal services (e.g., maid, chauffeur, chef)		
b	If any of the boxes on Line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	**1b**	Yes	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked on Line 1a?	**2**	Yes	
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.			
	☐ Compensation committee	☐ Written employment contract		
	☐ Independent compensation consultant	☐ Compensation survey or study		
	☐ Form 990 of other organizations	☑ Approval by the board or compensation committee		
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:			
a	Receive a severance payment or change-of-control payment?	**4a**		No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.			
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:			
a	The organization?	**5a**		
b	Any related organization?	**5b**		
	If "Yes," on line 5a or 5b, describe in Part III.			
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:			
a	The organization?	**6a**		
b	Any related organization?	**6b**		
	If "Yes," on line 6a or 6b, describe in Part III.			
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III	**8**		
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?	**9**		

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

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

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

(A) Name and Title		**(B)** Breakdown of W-2, 1099-MISC compensation, and/or 1099-NEC			**(C)** Retirement and other deferred compensation	**(D)** Nontaxable benefits	**(E)** Total of columns (B)(i)-(D)	**(F)** Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	**(ii)** Bonus & incentive compensation	**(iii)** Other reportable compensation				
1PETER MACKINNON PRESIDENT	**(i)**	128,175	0	0	22,922	28,388	179,485	0
	(ii)	0	0	0	0	0	0	0
2ISRAEL PIERRE TREASURER	**(i)**	113,626	0	0	22,479	19,673	155,778	0
	(ii)	0	0	0	0	0	0	0

Part III Supplemental Information

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

Return Reference	Explanation
PART I, LINE 1A	THERE IS A DISCRETIONARY SPENDING ACCOUNT FOR THE PRESIDENT OF THE ORGANIZATION WHICH IS NOT TREATED AS TAXABLE COMPENSATION. THE PRESIDENT'S DISCRETIONARY ACCOUNT CAN BE USED ONLY FOR CONTRIBUTIONS TO LABOR OR CHARITABLE ORGANIZATIONS.

Additional Data

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SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ **Attach to Form 990 or 990-EZ.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization
LOCAL 509 SERVICE EMPLOYEES INTERNATIONAL UNION

Employer identification number
04-6190454

Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 6	THE LOCAL'S MEMBERS ARE INDIVIDUALS WHO ARE REPRESENTED BY THE LOCAL.
FORM 990, PART VI, SECTION A, LINE 7A	THE MEMBERS OF THE LOCAL ELECT THE GOVERNING BOARD IN ACCORDANCE WITH THE LOCAL'S BY-LAWS.
FORM 990, PART VI, SECTION B, LINE 11B	FORM 990 IS PRESENTED TO THE EXECUTIVE BOARD BEFORE IT IS FILED.
FORM 990, PART VI, SECTION B, LINE 12C	EACH MEMBER OF THE JOINT EXECUTIVE BOARD AS WELL AS KEY STAFF ARE REQUIRED TO COMPLETE A CONFLICT OF INTEREST STATEMENT.
FORM 990, PART VI, SECTION B, LINE 15B	THE JOINT EXECUTIVE BOARD VOTES ON THE COMPENSATION FOR THE OFFICERS.
FORM 990, PART VI, SECTION C, LINE 19	AVAILABLE ON REQUEST AND/OR ON THE LOCAL'S WEBSITE.
FORM 990, PART XII, LINE 2C	NO CHANGE IN OVERSIGHT PROCESS OR SELECTION OF INDEPENDENT ACCOUNTANT.

Additional Data

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