

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:

TO PERMANENTLY BREAK THE CYCLE OF POVERTY FOR OUR MOST VULNERABLE NEIGHBORS: LOW-INCOME FAMILIES, CHILDREN, VETERANS AND PEOPLE EXPERIENCING HOMELESSNESS.

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 \$ 23,044,121 including grants of \$ 16,291,387) (Revenue \$ 0)

FROM OUR PROGRAM PERTAINING TO ACCESS TO HOUSING, OUR GOAL IS TO TURN THE BEST LESSONS OF THE PANDEMIC CRISIS INTO BOLD PROGRAMS THAT COMPLEMENT THE REGION'S APPROACH TO THE CRISIS AT EVERY STEP: ON THE STREET, IN THE SHELTERS, AND EVEN WITH THE MISSING PIECE OF HOUSING CONSTRUCTION. SEE SCHEDULE O FOR FURTHER DETAILS.

4b (Code:) (Expenses \$ 360,817 including grants of \$ 255,085) (Revenue \$ 0)

IN OUR ENDEAVORS TO IMPROVE EDUCATION, OUR GOAL IS TO CONTINUE TO SUPPORT OUR PARTNERS AND DEVELOP BEST PRACTICES IN HELPING OUR MOST VULNERABLE STUDENTS. WE SUPPORT BRIDGING THE DIGITAL DIVIDE TO ENSURE STUDENTS CAN LEARN AND THRIVE. WE AMPLIFY THE VOICES OF PARENTS AND STUDENTS (CLASS) AND CONTINUE TO SUPPORT OUR YOUNG CIVIC LEADERS (YCLP). SEE SCHEDULE O FOR FURTHER DETAILS.

4c (Code:) (Expenses \$ 3,503,207 including grants of \$ 2,476,645) (Revenue \$ 0)

IN OUR WORK AIMED AT IMPROVING FINANCIAL STABILITY, OUR GOAL IS TO CONTINUE TO COLLABORATE WITH OUR PARTNERS TO ENSURE OUR MOST VULNERABLE NEIGHBORS, INCLUDING PEOPLE NOT ELIGIBLE FOR FEDERAL BENEFITS, HAVE THE HELP THAT THEY NEED TO WEATHER THE ONGOING FINANCIAL CRISIS. WE WILL SPREAD THE WORD AS NEW TAX INITIATIVES ARE DIRECTED AT WORKING FAMILIES TO HELP THEM THRIVE. SEE SCHEDULE O FOR FURTHER DETAILS.

(Code:) (Expenses \$ 9,253,127 including grants of \$ 9,253,127) (Revenue \$ 122,983)

OTHER PROGRAM SERVICES - DESIGNATIONS TO OTHER NONPROFIT ORGANIZATIONS: ON BEHALF OF ITS DONORS, UNITED WAY PROCESSED \$9,253,127 IN DESIGNATIONS TO OTHER NONPROFIT ORGANIZATIONS.

4d Other program services (Describe in Schedule O.)
(Expenses \$ 9,253,127 including grants of \$ 9,253,127) (Revenue \$ 122,983)

4e Total program service expenses 36,161,272

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 Yes	
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	No
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 Yes	
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	No
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 Yes	
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 Yes	
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)?	11f Yes	
12a If "Yes," complete Schedule D, Part XI. 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 Yes	
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 Yes	

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	No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I	25b	No
26	Did the organization report any amount on Part X, line 5 or 22 for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons?	26	No
27	If "Yes," complete Schedule L, Part I. 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	Yes
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?	30	No
31	If "Yes," complete Schedule M. Did the organization reorganize, 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?	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	No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	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	60
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	93			
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)? Enter the name of the foreign country: _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		4a			No	
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			No	
f		Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		7f			No	
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?		15			No	
16		If the organization is a trust, did it file Form 720, Schedule N, to report the section 4968 excise tax on net investment income?		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

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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.		
1b	Enter the number of voting members included in line 1a, above, who are independent		
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	No
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	No
7b	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:		
8a	The governing body?	8a	Yes
8b	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	No
10b	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	
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
11b	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
12b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
12c	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	Yes
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?		
15a	The organization's CEO, Executive Director, or top management official	15a	Yes
15b	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
16b	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	CA
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: LINING LEE RECENDEZ 1150 S OLIVE STREET SUITE T500 LOS ANGELES, CA 90015 (213) 808-6399	

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) LARRY JAMES CHAIR	5.00 0.00	X		X				0	0	0
(2) RUDY MEDINA CORPORATE SECRETARY	5.00 0.00	X		X				0	0	0
(3) ADELE BERWANGER BOARD MEMBER	1.00 0.00	X						0	0	0
(4) CHRIS CAREY BOARD MEMBER	5.00 0.00	X						0	0	0
(5) ALEX MARTIN CHAVES BOARD MEMBER	1.00 0.00	X						0	0	0
(6) CAROLINE CHOE BOARD MEMBER	1.00 0.00	X						0	0	0
(7) SCOTT COHEN BOARD MEMBER	1.00 0.00	X						0	0	0
(8) LISA CLERI REALE BOARD MEMBER	1.00 0.00	X						0	0	0
(9) KEVIN DEMOFF BOARD MEMBER	1.00 0.00	X						0	0	0
(10) SANDRA HRNA BOARD MEMBER	1.00 0.00	X						0	0	0
(11) RON HERRERA EX-OFFICIO	1.00 0.00	X						0	0	0
(12) MARC HICKMAN BOARD MEMBER	1.00 0.00	X						0	0	0
(13) DARLENE HOPKINS BOARD MEMBER	1.00 0.00	X						0	0	0
(14) STEWART KWOH BOARD MEMBER	1.00 0.00	X						0	0	0
(15) BRAD LARSEN BOARD MEMBER	1.00 0.00	X						0	0	0
(16) ROBYN LAWHON BOARD MEMBER	1.00 0.00	X						0	0	0
(17) MICHAEL LAWSON BOARD MEMBER	1.00 0.00	X						0	0	0

Part VII

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/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) MARK LOUCHHEIM BOARD MEMBER	1.00 0.00	X						0	0	0
(19) SEAN MCBURNEY BOARD MEMBER	1.00 0.00	X						0	0	0
(20) JULIE MILLER-PHIPPS BOARD MEMBER	1.00 0.00	X						0	0	0
(21) JERRY NEUMAN BOARD MEMBER	1.00 0.00	X						0	0	0
(22) IRENE OH BOARD MEMBER	1.00 0.00	X						0	0	0
(23) LUIS PATINO BOARD MEMBER - PART YEAR	1.00 0.00	X						0	0	0
(24) MARK PHAIR BOARD MEMBER - PART YEAR	1.00 0.00	X						0	0	0
(25) DOMINIC PORPORINO BOARD MEMBER	1.00 0.00	X						0	0	0
(26) RICHARD RAFFETTO BOARD MEMBER	1.00 0.00	X						0	0	0
(27) ERIK ROBINSON BOARD MEMBER	1.00 0.00	X						0	0	0
(28) MARIA SALINAS BOARD MEMBER	1.00 0.00	X						0	0	0
(29) MARTHA SANTANA-CHIN BOARD MEMBER	1.00 0.00	X						0	0	0
(30) NATALIE SCHILLING BOARD MEMBER	1.00 0.00	X						0	0	0
(31) JADE SHOPP BOARD MEMBER	1.00 0.00	X						0	0	0
(32) MICHAEL SILACCI BOARD MEMBER	1.00 0.00	X						0	0	0
(33) RENATA SIMRIL BOARD MEMBER	1.00 0.00	X						0	0	0
(34) MICHELLE WROAN BOARD MEMBER	1.00 0.00	X						0	0	0
(35) ELISE BUIK PRESIDENT & CEO	50.00 0.00	.....		X				567,471	0	252,102
(36) LINING RECENDEZ VP, FINANCE	50.00 0.00	.....		X				215,092	0	52,147
(37) TAULENE KAGAN VP, SPECIAL PROJECTS & INITIATIVES	50.00 0.00	.....			X			215,289	0	52,750
(38) OSCAR CRUZ CHIEF OPERATING OFF. - PART YEAR	50.00 0.00	.....			X			187,236	0	19,993
(39) CHRIS KO VP, IMPACT & STRATEGY	50.00 0.00	.....			X			178,876	0	20,559
(40) THOMAS NEWMAN VP, ENGAGEMENT & ACTIVATION	50.00 0.00	.....				X		144,834	0	25,577
(41) DAVID TRAN DIRECTOR, FINANCE	50.00 0.00	.....				X		134,989	0	21,569
(42) CARTER HEWGLEY DIRECTOR, HOMELESSNESS INITIATIVES	50.00 0.00	.....				X		141,722	0	10,424
(43) CRISTIAN YANCEY DIRECTOR, MARKETING & EVENTS	50.00 0.00	.....				X		135,235	0	15,541
(44) ELICIA LOPEZ DIR., INDIVID. GIVING - PART YEAR	50.00 0.00	.....				X		124,679	0	8,603
1b Sub-Total ▶										
c Total from continuation sheets to Part VII, Section A ▶										
d Total (add lines 1b and 1c) ▶							2,045,423	0	479,265	

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 ▶ 19

3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	Yes	No
			No
		3	
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>		
		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? <i>If "Yes," complete Schedule J for such person</i>		
		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
SWELL CREATIVE GROUP (FUNDED BY GRANTS) 1920 HILLHURST AVE 436 LOS ANGELES, CA 90027	DIGITAL COMM. & DESIGN	1,346,651
VERITIMO 2420 HARLEM BLVD ROCKFORD, IL 61103	IT MANAGEMENT	470,880
SLAY EVENT MANAGEMENT & CONSULTING 325 CULVER BLVD 4 PLAYA DEL REY, CA 90293	EVENTS MANAGEMENT	460,629
MAL WARWICK ASSOCIATES 2550 NINETH ST 103 BERKELEY, CA 94710	DIRECT MAIL & DIG. FUND.	214,947
GLOBAL POLICY LEADERSHIP ACADEMY 404 EUCLID AVE 212 SAN DIEGO, CA 92114	RESEARCH & MEETING FACILITATION	155,161
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 ▶ 7		

Part VIII

Statement of Revenue

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants, and Other			1a Federated campaigns		1a		
Amt Similar Amounts			b Membership dues		1b		
			c Fundraising events		1c		
			d Related organizations		1d		
			e Government grants (contributions)		1e1,673,952		
			f All other contributions, gifts, grants, and similar amounts not included above		1f46,263,300		
			g Noncash contributions included in lines 1a - 1f:\$		1g167,868		
			h Total. Add lines 1a-1f		47,937,252		
Program Service Revenue	2a	Business Code					
	b						
	c						
	d						
	e						
	f All other program service revenue.						
9 Total. Add lines 2a-2f.							
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)		455,661			455,661	
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties		1,439			1,439	
		(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	1,426,890				
	b Less: cost or other basis and sales expenses	7b	1,410,135				
	c Gain or (loss)	7c	16,755				
	d Net gain or (loss)			16,755			16,755
	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 ADMIN FEE AND EXPENSE		900099	1,102,412	122,983		979,429	
b ALL OTHER REVENUE		900099	88,571			88,571	
c							
d All other revenue							
e Total. Add lines 11a-11d			1,190,983				
12 Total revenue. See instructions			49,602,090	122,983	0	1,541,855	

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	28,276,244	28,276,244		
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	1,193,097	488,216	408,853	296,028
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	5,612,199	2,815,926	1,235,893	1,560,380
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	574,689	176,974	273,184	124,531
9 Other employee benefits	472,968	243,072	75,154	154,742
10 Payroll taxes	558,237	271,640	138,107	148,490
11 Fees for services (non-employees):				
a Management	17,587		17,587	
b Legal	28,956		28,956	
c Accounting	126,400		126,400	
d Lobbying	163,459	163,459		
e Professional fundraising services. See Part IV, line 17	168,122			168,122
f Investment management fees	31,865		31,865	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O.)	3,200,501	2,075,043	525,527	599,931
12 Advertising and promotion	343,119	94,702	34,598	213,819
13 Office expenses	355,903	157,550	107,093	91,260
14 Information technology	652,472	276,710	190,955	184,807
15 Royalties				
16 Occupancy	879,380	414,717	316,611	148,052
17 Travel	72,399	45,827	14,821	11,751
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	102,634	66,219	21,762	14,653
20 Interest	7,833	3,368	3,055	1,410
21 Payments to affiliates	498,922	214,536	194,580	89,806
22 Depreciation, depletion, and amortization	124,711	53,626	48,637	22,448
23 Insurance	109,358	47,024	42,650	19,684
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 MISCELLANEOUS EXPENSES	584,227	276,419	200,831	106,977
b				
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	44,155,282	36,161,272	4,037,119	3,956,891
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)		(B)	
				Beginning of year		End of year	
Assets	1	Cash—non-interest-bearing		44,135,929	1	45,095,279	
	2	Savings and temporary cash investments		57,305	2	0	
	3	Pledges and grants receivable, net		12,162,511	3	9,546,654	
	4	Accounts receivable, net		987,332	4	1,238,483	
	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		213,820	9	726,567	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	1,961,528			
	b	Less: accumulated depreciation	10b	1,621,720	464,518	10c	339,808
	11	Investments—publicly traded securities		31,763,176	11	30,186,529	
	12	Investments—other securities. See Part IV, line 11			12		
	13	Investments—program-related. See Part IV, line 11			13	2,450,000	
	14	Intangible assets			14		
	15	Other assets. See Part IV, line 11		418,695	15	418,695	
16	Total assets. Add lines 1 through 15 (must equal line 33)		90,203,286	16	90,002,015		
Liabilities	17	Accounts payable and accrued expenses		2,240,605	17	2,960,164	
	18	Grants payable		9,000,180	18	4,003,427	
	19	Deferred revenue		0	19	0	
	20	Tax-exempt bond liabilities			20		
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		418,695	21	418,695	
	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		2,667,762	25	1,514,989	
	26	Total liabilities. Add lines 17 through 25		14,327,242	26	8,897,275	
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		42,206,303	27	42,120,400	
	28	Net assets with donor restrictions		33,669,741	28	38,984,340	
	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		75,876,044	32	81,104,740	
	33	Total liabilities and net assets/fund balances		90,203,286	33	90,002,015	

Part XI

Reconciliation of Net Assets

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

☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	49,602,090
2	Total expenses (must equal Part IX, column (A), line 25)	2	44,155,282
3	Revenue less expenses. Subtract line 2 from line 1	3	5,446,808
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	75,876,044
5	Net unrealized gains (losses) on investments	5	-2,082,955
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	1,864,843
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (A))	10	81,104,740

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? 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		No
b Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis	Yes	
c If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	Yes	
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?		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.		

Additional Data

Return to Form

Software ID:

Software Version:

Form 990, Special Condition Description:

Special Condition Description

SCHEDULE A

(Form 990)

Department of the Treasury

Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

2021

Open to Public Inspection

Name of the organization

UNITED WAY INC

Employer identification number

95-2274801

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).)

3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state:

5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)

6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

8

☐

A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)

9

☐

An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture. See instructions. Enter the name, city, and state of the college or university:

10

☐

An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)

11

☐

An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**

12

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

a

☐

Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**

b

☐

Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**

c

☐

Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**

d

☐

Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**

e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f

Enter the number of supported organizations

g

Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Cat. No. 11285F

Schedule A (Form 990) 2021

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization failed to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grant.") . .	45,378,145	57,990,208	57,856,988	66,980,133	47,937,252	276,142,726
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge..						
4 Total. Add lines 1 through 3	45,378,145	57,990,208	57,856,988	66,980,133	47,937,252	276,142,726
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) . .						31,971,175
6 Public support. Subtract line 5 from line 4.						244,171,551

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4. .	45,378,145	57,990,208	57,856,988	66,980,133	47,937,252	276,142,726
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	271,853	318,073	290,572	304,919	457,100	1,642,517
9 Net income from unrelated business activities, whether or not the business is regularly carried on. .						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.). .	691,258	1,017,796	1,374,759	1,215,232	1,068,000	5,367,045
11 Total support. Add lines 7 through 10						283,152,288

12 Gross receipts from related activities, etc. (see instructions) **12** 983,561

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

Section C. Computation of Public Support Percentage

14 Public support percentage for 2021 (line 6, column (f) divided by line 11, column (f))	14	86.230 %
15 Public support percentage for 2020 Schedule A, Part II, line 14	15	86.110 %

- 16a 33 1/3% support test—2021.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☒
- b 33 1/3% support test—2020.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ☐
- 17a 10%-facts-and-circumstances test—2021.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐
- b 10%-facts-and-circumstances test—2020.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization ☐
- 18 Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ☐

Part IIISupport Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year.						
c Add lines 7a and 7b. .						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 Amounts from line 6. . .						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources . .						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975.						
c Add lines 10a and 10b.						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on.						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) . .						
13 Total support. (Add lines 9, 10c, 11, and 12.) .						
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here.						

Section C. Computation of Public Support Percentage		
15 Public support percentage for 2021 (line 8, column (f) divided by line 13, column (f))	15	
16 Public support percentage from 2020 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2021 (line 10c, column (f) divided by line 13, column (f))	17	
18 Investment income percentage from 2020 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
b 33 1/3% support tests—2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions		

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, of Part I, complete Sections A and B. If you checked box 12b, of Part I, complete Sections A and C. If you checked box 12c, of Part I, complete Sections A, D, and E. If you checked box 12d, of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

		Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? 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.		
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).		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.		
b	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.		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? 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.		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI , including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).		
b	Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
c	Substitutions only. Was the substitution the result of an event beyond the organization's control?		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI .		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990) .		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).		
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 .		
b	Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI .		
c	Did a disqualified person (as defined on 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 .		
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 line 10b below.		
b	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).		

Part IV

Supporting Organizations (continued)

		Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?		
a	A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
b	A family member of a person described on 11a above?		
c	A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to 11a, 11b, or 11c, provide detail in Part VI		

Section B. Type I Supporting Organizations

		Yes	No
1	Did the officers, directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? 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.		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? 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.		

Section C. Type II Supporting Organizations

		Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? 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).		

Section D. All Type III Supporting Organizations

		Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).		
3	By reason of the relationship described in line 2 above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally-Integrated Supporting Organizations

1	Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions):			
a	☐ The organization satisfied the Activities Test. Complete line 2 below.			
b	☐ The organization is the parent of each of its supported organizations. Complete line 3 below.			
c	☐ The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions)			
2	Activities Test. Answer lines 2a and 2b below.			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? 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.			
b	Did the activities described on line 2a, above 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.			
3	Parent of Supported Organizations. Answer lines 3a and 3b below.			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No", provide details in Part VI.			
b	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.			

Part V **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1** ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (*explain in **Part VI***). **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income

(A) Prior Year

(B) Current Year
(optional)

1	Net short-term capital gain	1
2	Recoveries of prior-year distributions	2
3	Other gross income (see instructions)	3
4	Add lines 1 through 3	4
5	Depreciation and depletion	5
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6
7	Other expenses (see instructions)	7
8	Adjusted Net Income (subtract lines 5, 6 and 7 from line 4)	8

Section B - Minimum Asset Amount

(A) Prior Year

(B) Current Year
(optional)

1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):	1
a	Average monthly value of securities	1a
b	Average monthly cash balances	1b
c	Fair market value of other non-exempt-use assets	1c
d	Total (add lines 1a, 1b, and 1c)	1d
e	Discount claimed for blockage or other factors (<i>explain in detail in Part VI</i>):	
2	Acquisition indebtedness applicable to non-exempt use assets	2
3	Subtract line 2 from line 1d	3
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5
6	Multiply line 5 by 0.035	6
7	Recoveries of prior-year distributions	7
8	Minimum Asset Amount (add line 7 to line 6)	8

Section C - Distributable Amount

Current Year

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

- 7** ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations			(continued)
Section D - Distributions		Current Year	
1 Amounts paid to supported organizations to accomplish exempt purposes	1		
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2		
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	3		
4 Amounts paid to acquire exempt-use assets	4		
5 Qualified set-aside amounts (<i>prior IRS approval required - provide details in Part VI</i>)	5		
6 Other distributions (<i>describe in Part VI</i>). See instructions	6		
7 Total annual distributions. Add lines 1 through 6.	7		
8 Distributions to attentive supported organizations to which the organization is responsive (<i>provide details in Part VI</i>). See instructions	8		
9 Distributable amount for 2021 from Section C, line 6	9		
10 Line 8 amount divided by Line 9 amount	10		

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2021	(iii) Distributable Amount for 2021
1 Distributable amount for 2021 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2021 (reasonable cause required-- <i>explain in Part VI</i>). See instructions.			
3 Excess distributions carryover, if any, to 2021:			
a From 2016.			
b From 2017.			
c From 2018.			
d From 2019.			
e From 2020.			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2021 distributable amount			
i Carryover from 2016 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2021 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2021 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
6 Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. If the amount is greater than zero, <i>explain in Part VI</i> . See instructions.			
7 Excess distributions carryover to 2022. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2017.			
b Excess from 2018.			
c Excess from 2019.			
d Excess from 2020.			
e Excess from 2021.			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Return Reference	Explanation
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Additional Data

Return to Form

Software ID:

Software Version:

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 UNITED WAY INC	Employer identification number 95-2274801
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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. If none, enter -0-.
1				
2				
3				
4				
5				
6				

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.															
<table><tr><th>If the amount on line 1e, column (a) or (b) is:</th><th>The lobbying nontaxable amount is:</th></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e.</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000.</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000.</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000.</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000.</td></tr></table>		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.		
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)		(b)
			Yes	No	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?	Yes			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	Yes			
c	Media advertisements?	Yes			25,379
d	Mailings to members, legislators, or the public?			No	
e	Publications, or published or broadcast statements?			No	
f	Grants to other organizations for lobbying purposes?	Yes			6,180
g	Direct contact with legislators, their staffs, government officials, or a legislative body?	Yes			202,055
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?			No	
i	Other activities?	Yes			51,630
j	Total. Add lines 1c through 1i				285,244
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			No	
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	
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3	Did the organization agree to carry over lobbying and political expenditures from the prior year?	3	

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
SCHEDULE C, PART II-B, LOBBYING ACTIVITIES	1C - THE ORGANIZATION USED PAID MEDIA ON THE INTERNET AS WELL AS IN PRINT AND OUTDOOR ADVERTISING TO BUILD SUPPORT FOR PERMANENT SOLUTIONS TO HOMELESSNESS (AS COMPARED TO TEMPORARY AND SHORT TERM FIXES). THESE PAID ADS DISCUSSED ACTIVE EFFORTS UNDERWAY ACROSS L.A. COUNTY, INCLUDING THE LEGISLATION (SB679) THAT UWGLA SPONSORED IN SACRAMENTO AND POLICY CHANGE EFFORTS AT THE COUNTY AND CITY OF LOS ANGELES. 1F - THE ORGANIZATION PROVIDED GRANTS TO OTHER ORGANIZATIONS IN ORDER TO INCREASE THEIR CAPACITY TO ENGAGE IN POLICY WORK BROADLY. THIS INCLUDES DIRECT SUPPORT TO NON-CANDIDATE BALLOT MEASURE CAMPAIGNTS, PUBLIC EDUCATION WORKFOR EXAMPLE, TALKING ABOUT THE CAUSES AND SOLUTIONS TO HOMELESSNESSAS WELL AS LOBBYING WORK LIKE ACTIVATING THEIR OWN SUPPORTERS AND MEMBERS TO CONTACT ELECTED OFFICIALS. 1G - STAFF MEMBERS AT UNITED WAY L.A. CREATED COMMUNICATIONS MATERIALS, BUILT COALITIONS, AND DIRECTED THESE EFFORTS TOWARDS SPECIFIC ELECTED OFFICIALS AND VOTERS IN THE CONTEXT OF OUR SPONSORED LEGISLATION IN SACRAMENTO (SB679) ALL IN PURSUIT OF POLICY CHANGE AND FUNDING. INCREASES. 1I - STAFF MEMBERS AT UNITED WAY L.A WORKED WITH HIRED OUTSIDE CONSULTANTS WITH EXPERTISE IN PUBLIC AFFAIRS AND POLICY CHANGE TO HELP PROVIDE STRATEGIC ADVICE AND OUTREACH SUPPORT TO THE ORGANIZATION.

Additional Data

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Software ID:

Software Version:

Name of the organization UNITED WAY INC	Employer identification number 95-2274801
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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.	
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 | 5,222,243 | 4,046,690 | 3,961,572 | 3,767,654 | 3,398,333 |
| b Contributions | | | | | 100,000 |
| c Net investment earnings, gains, and losses | -707,319 | 1,175,553 | 85,118 | 193,918 | 269,321 |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | 4,514,924 | 5,222,243 | 4,046,690 | 3,961,572 | 3,767,654 |
- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment ▶ 100.000 %

b Permanent endowment ▶

c Term endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations

(ii) Related organizations

b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?
- | | Yes | No |
|--------|-----|----|
| 3a(i) | | No |
| 3a(ii) | | No |
| 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 | | 1,728,118 | 1,414,520 | 313,598 |
| d Equipment | | 87,889 | 87,889 | 0 |
| e Other | | 145,521 | 119,311 | 26,210 |
| Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c).) . . . ▶ | | | | 339,808 |

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	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, col.(B) line 25.)	1,514,989

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	38,266,008
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-2,082,955
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	-2,082,955
3	Subtract line 2e from line 1	3	40,348,963
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	9,253,127
c	Add lines 4a and 4b	4c	9,253,127
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	49,602,090

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	34,902,155
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	34,902,155
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	9,253,127
c	Add lines 4a and 4b	4c	9,253,127
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	44,155,282

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 IV, LINE 2B:	CUSTODIAN FUNDS ARE HELD BY UNITED WAY ON BEHALF OF OTHER ENTITIES AND ARE DISBURSED ONLY UPON INSTRUCTIONS FROM SUCH ENTITIES.
PART V, LINE 4:	THE BOARD DESIGNATED ENDOWMENT FUND WAS SET UP TO INVEST FUNDS AND PROVIDE SECURITY TO THE FUTURE OPERATIONS OF UNITED WAY.
PART X, LINE 2:	UNITED WAY FOLLOWS GUIDANCE THAT CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN, INCLUDING ISSUES RELATING TO FINANCIAL STATEMENT RECOGNITION AND MEASUREMENT. THIS GUIDANCE PROVIDES THAT THE TAX EFFECTS FROM AN UNCERTAIN TAX POSITION CAN ONLY BE RECOGNIZED IN THE FINANCIAL STATEMENTS IF THE POSITION IS MORE-LIKELY-THAN-NOT TO BE SUSTAINED IF THE POSITION WERE TO BE CHALLENGED BY A TAXING AUTHORITY. THE ASSESSMENT OF THE TAX POSITION IS BASED SOLELY ON THE TECHNICAL MERITS OF THE POSITION, WITHOUT REGARD TO THE LIKELIHOOD THAT THE TAX POSITION MAY BE CHALLENGED. UNITED WAY IS EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE, THOUGH IT IS SUBJECT TO TAX ON INCOME UNRELATED TO ITS EXEMPT PURPOSE, UNLESS THAT INCOME IS OTHERWISE EXCLUDED BY THE CODE. UNITED WAY HAS ALSO BEEN RECOGNIZED BY THE CALIFORNIA FRANCHISE TAX BOARD AS EXEMPT FROM CALIFORNIA FRANCHISE AND INCOME TAXES UNDER SECTION 23701D OF THE CALIFORNIA REVENUE AND TAXATION CODE. UNITED WAY HAS PROCESSES PRESENTLY IN PLACE TO ENSURE THE MAINTENANCE OF ITS TAX-EXEMPT STATUS; TO IDENTIFY AND REPORT UNRELATED INCOME; TO DETERMINE ITS FILING AND TAX OBLIGATIONS IN JURISDICTIONS FOR WHICH IT HAS NEXUS; AND TO IDENTIFY AND EVALUATE OTHER MATTERS THAT MAY BE CONSIDERED TAX POSITIONS. UNITED WAY HAS DETERMINED THAT THERE ARE NO MATERIAL UNCERTAIN TAX POSITIONS THAT REQUIRE RECOGNITION OR DISCLOSURE IN THE FINANCIAL STATEMENTS.
SCHEDULE D, PART XI, LINE 4D AND PART XII LINE 4D:	ON BEHALF OF ITS DONORS, UNITED WAY PROCESSED DESIGNATIONS TO OTHER NONPROFIT ORGANIZATIONS IN THE AMOUNT OF \$9,253,127.

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Name of the organization
UNITED WAY INC

Employer identification number
95-2274801

Part I Fundraising Activities. Complete if the organization answered "Yes" on Form 990, Part IV, line 17.
Form 990-EZ filers are not required to complete this part.

- 1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.
- a ☒ Mail solicitations

e ☒ Solicitation of non-government grants

b ☒ Internet and email solicitations

f ☒ Solicitation of government grants

c ☒ Phone solicitations

g ☒ Special fundraising events

d ☒ In-person solicitations
- 2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☒ Yes ☐ No
- b If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col. (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
1 MAL WARWICK ASSOCIATES 2550 NINTH STREET SUITE 103 BERKELEY, CA 94710	DIRECT MAIL		No	451,717	168,122	283,595
2						
3						
4						
5						
6						
7						
8						
9						
10						
Total ▶				451,717	168,122	283,595

3 List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

Part II Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a)Event #1	(b) Event #2	(c)Other events	(d) Total events
		(event type)	(event type)	(total number)	(add col. (a) through col. (c))
Revenue					
	1 Gross receipts				
	2 Less: Contributions				
Direct Expenses	3 Gross income (line 1 minus line 2)				
	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages				
	8 Entertainment				
	9 Other direct expenses				
	10 Direct expense summary. Add lines 4 through 9 in column (d) ▶				
	11 Net income summary. Subtract line 10 from line 3, column (d) ▶				

Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col.(a) through col.(c))
Revenue	1 Gross revenue				
Direct Expenses	2 Cash prizes				
	3 Noncash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	☐ Yes _____ % ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) ▶				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) ▶				

9 Enter the state(s) in which the organization conducts gaming activities:_____

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: _____

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? . . . ☐ Yes ☐ No

b If "Yes," explain: _____

11

Does the organization conduct gaming activities with nonmembers?

☐ Yes ☐ No

12

Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

☐ Yes ☐ No

13

Indicate the percentage of gaming activity conducted in:

a	The organization's facility	13a	%
b	An outside facility	13b	%

14

Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name ▶ -----

Address ▶ -----

15a

Does the organization have a contract with a third party from whom the organization receives gaming revenue?

☐ Yes ☐ No

b

If "Yes," enter the amount of gaming revenue received by the organization ▶ \$ _____ and the amount of gaming revenue retained by the third party ▶ \$ _____.

c

If "Yes," enter name and address of the third party:

Name ▶ -----

Address ▶ -----

16 Gaming manager information:

Name ▶ -----

Gaming manager compensation ▶ \$ -----.

Description of services provided ▶ -----

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions:

a

Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?

☐ Yes ☐ No

b

Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ▶ \$ _____.

Part IV Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See Instructions.

Return Reference	Explanation
SCHEDULE G, PART I, LINE 2B:	THE FUNDRAISER WAS PAID \$168,122 FOR ITS PROFESSIONAL FUNDRAISING SERVICES AND THIS AMOUNT WAS REPORTED IN PART I, LINE 2B. THE FUNDRAISER WAS ALSO PAID \$153,623 FOR FUNDRAISING EXPENSES, SUCH AS PRINTING, PAPER, ENVELOPES, POSTAGE, MAILING LIST AND OTHER REIMBURSABLE EXPENSES. FUNDRAISING EXPENSES WERE SEPARATELY IDENTIFIED ON INVOICES.

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047

2021

Open to Public Inspection

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 for the latest information.

Name of the organization
UNITED WAY INC

Employer identification number
95-2274801

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.

(a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) ABUNDANT HOUSING 1013 16TH ST UNIT 102 SANTA MONICA, CA 90403	82-4616689	501(C)(3)	25,000	0			HOUSING
(2) ACTIVE SAN GABRIEL VALLEY 10900 MULHALL ST EL MONTE, CA 91731	85-2110415	501(C)(3)	37,500	0			HOUSING
(3) ALLIANCE FOR CALIFORNIANS FOR COMMUNITY EMPOWERMENT 3655 S GRAND AVE 250 LOS ANGELES, CA 90007	27-1482731	501(C)(3)	75,000	0			HOUSING
(4) ANTELOPE VALLEY DOMESTIC VIOLENCE PO BOX 2980 LANCASTER, CA 93539	95-3582588	501(C)(3)	163,275	0			HOUSING
(5) BELLFLOWER KINGDOM CAUSES (OUR PLACE HOUSING SOLUTIONS) 16429 BELLFLOWER BLVD BELLFLOWER, CA 90706	95-4849998	501(C)(3)	245,006	0			HOUSING
(6) BLACK WOMEN FOR WELLNESS 4340 11TH AVE LOS ANGELES, CA 90008	95-4624707	501(C)(3)	37,500	0			HOUSING
(7) BOYS & GIRLS CLUB OF THE LOS ANGELES HARBOR 1200 S CABRILLO AVENUE SAN PEDRO, CA 90731	95-1661682	501(C)(3)	29,250	0			EDUCATION
(8) BRILLIANT CORNERS 527 W 7TH ST SUITE 1100 LOS ANGELES, CA 90014	56-2379862	501(C)(3)	547,625	0			HOUSING
(9) BUILDING SKILLS PARTNERSHIP 828 W WASHINGTON BLVD LOS ANGELES, CA 90015	26-1254255	501(C)(3)	112,500	0			ECONOMIC MOBILITY
(10) CANGRESS DBA LA COMMUNITY ACTION NETWORK 838 E 6TH STREET LOS ANGELES, CA 90021	02-0661629	501(C)(3)	144,000	0			HOUSING
(11) CATHOLIC CHARITIES OF LOS ANGELES 1531 JAMES M WOOD BLVD LOS ANGELES, CA 90015	95-1690973	501(C)(3)	22,000	0			HOUSING
(12) CAUSEIMPACTS 5301 W 119TH PLACE INGLEWOOD, CA 90304	82-1357285		25,000	0			ECONOMIC MOBILITY
(13) CENTER FOR NONPROFIT MANAGEMENT 1000 N ALAMEDA ST SUITE 250 LOS ANGELES, CA 90012	95-3357253	501(C)(3)	21,830	0			HOUSING
(14) CENTRAL AMERICAN RESOURCE CENTER OF CA 2845 W 7TH STREET LOS ANGELES, CA 90005	95-3867724	501(C)(3)	6,000	0			ECONOMIC MOBILITY
(15) CITY OF LOS ANGELES 200 N SPRING ST 3RD FLOOR LOS ANGELES, CA 90012		501(C)(3)	680,000	0			HOUSING
(16) CLIFFORD BEERS HOUSING 11739 VICTORY BLVD NORTH HOLLYWOOD, CA 91606	95-4485263	501(C)(3)	75,000	0			HOUSING
(17) CLIMATE RESOLVE 525 S HEWITT ST LOS ANGELES, CA 90013	46-4736278	501(C)(3)	25,000	0			HOUSING
(18) COMMUNITY HEALTH ALLIANCE-PASADENA 1855 N FAIR OAKS AVENUE 2ND FLOOR PASADENA, CA 91103	95-4536824	501(C)(3)	22,000	0			HOUSING
(19) CORPORATION FOR SUPPORTIVE HOUSING (CSH) 61 BROADWAY SUITE 2300 NEW YORK, NY 10006	13-3600232	501(C)(3)	15,000	0			HOUSING
(20) COUNTY OF LOS ANGELES 500 WEST TEMPLE STREET ROOM 726 LOS ANGELES, CA 90012		501(C)(3)	50,000	0			ECONOMIC MOBILITY
(21) COVENANT HOUSE CALIFORNIA 1325 N WESTERN NAVE LOS ANGELES, CA 90027	13-3391210	501(C)(3)	63,000	0			HOUSING
(22) DOWNTOWN WOMEN'S CENTER 442 S SAN PEDRO STREET LOS ANGELES, CA 90013	31-1597223	501(C)(3)	100,000	0			HOUSING
(23) EAST VALLEY COMMUNITY HEALTH CENTER 420 S GLENDORA AVENUE WEST COVINA, CA 91790	23-7068586	501(C)(3)	22,000	0			HOUSING
(24) EASTMONT COMMUNITY CENTER 701 S HOFNER AVE LOS ANGELES, CA 90022	95-6221642	501(C)(3)	17,000	0			ECONOMIC MOBILITY
(25) EL CENTRO DE AYUDA 2130 E 1ST STREET SUITE 110 LOS ANGELES, CA 90033	95-4563348	501(C)(3)	112,500	0			ECONOMIC MOBILITY
(26) ESUSU FINANCIAL INC 215 W 125TH ST ROOM 410 NEW YORK, NY 10027	82-4311750		57,500	0			ECONOMIC MOBILITY
(27) FIRST TO SERVE 1017 W 50TH ST LOS ANGELES, CA 90037	91-2167028	501(C)(3)	135,000	0			HOUSING
(28) FRIENDS OF CABRILO MARINE AQUARIUM 3720 STEPHEN M WHITE DRIVE SAN PEDRO, CA 90731	33-0585381	501(C)(3)	15,000	0			EDUCATION
(29) GENESIS LA ECONOMIC GROWTH CORPORATION 801 S GRAND AVE SUITE 775 LOS ANGELES, CA 90017	95-4712513	501(C)(3)	7,930,000	0			HOUSING
(30) HARBOR INTERFAITH SERVICES INC 670 W NINTH STREET SAN PEDRO, CA 90731	33-0031099	501(C)(3)	94,875	0			HOUSING
(31) HATHAWAY - SYCAMORE 210 SOUTH DELACEY SUITE 110 PASADENA, CA 91105	95-1691005	501(C)(3)	100,000	0			HOUSING
(32) HELPLINE YOUTH COUNSELING 12440 E FIRESTONE BLVD NORWALK, CA 90650	23-7113824	501(C)(3)	8,875	0			HOUSING
(33) HELUNA HEALTH 13300 CROSSROADS PARKWAY NORTH CITY OF INDUSTRY, CA 91746	95-2557063	501(C)(3)	15,400	0			HOUSING
(34) HOPE OF THE VALLEY PO BOX 7609 MISSION HILLS, CA 91346	27-2053273	501(C)(3)	50,000	0			HOUSING
(35) HOUSE OF RUTH INC PO BOX 459 CLAREMONT, CA 91768	95-3276033	501(C)(3)	8,875	0			HOUSING
(36) INCLUSIVE ACTION FOR THE CITY 553 S CLARENCE ST LOS ANGELES, CA 90033	27-0584116	501(C)(3)	25,000	0			HOUSING
(37) INNER CITY LAW CENTER 1309 E 7TH STREET LOS ANGELES, CA 90021	95-3697572	501(C)(3)	6,250	0			HOUSING
(38) KOREAN IMMIGRANT WORKERS ADVOCATES 1053 S NEW HAMPSHIRE AVE LOS ANGELES, CA 90006	95-4392004	501(C)(3)	50,000	0			HOUSING
(39) LA FAMILY HOUSING CORPORATION 7843 LANKERSHIM BOULEVARD NORTH HOLLYWOOD, CA 91605	95-3920560	501(C)(3)	363,675	0			HOUSING
(40) LA GLOBAL CARE 3651 SLA BREA AVE LOS ANGELES, CA 90016	81-4654070	501(C)(3)	47,000	0			HOUSING
(41) LA VOICE 650 N BERENDO LOS ANGELES, CA 90004	95-4781974	501(C)(3)	62,500	0			HOUSING
(42) LABOR COMMUNITY SERVICES 6004 MAYWOOD AVENUE LOS ANGELES, CA 90255	95-4147259	501(C)(3)	259,500	0			ECONOMIC MOBILITY
(43) LAGRANT COMMUNICATIONS 600 WILSHIRE BLVD SUITE 1610 LOS ANGELES, CA 90071	95-4298799	501(C)(3)	139,000	0			HOUSING
(44) LOS ANGELES LGBT CENTER 1625 NORTH SCHRADER BOULEVARD LOS ANGELES, CA 90028	95-3567895	501(C)(3)	100,000	0			HOUSING
(45) LTSC COMMUNITY DEVELOPMENT 231 E THIRD ST STE G106 LOS ANGELES, CA 90013	95-4444102	501(C)(3)	25,000	0			HOUSING
(46) MENTAL HEALTH AMERICA OF LOS ANGELES 100 W BROADWAY SUITE 5010 LONG BEACH, CA 90802	95-1881491	501(C)(3)	58,750	0			ECONOMIC MOBILITY
(47) MEXICAN AMERICAN LEGAL DEFENSE 634 S SPRING ST 11TH FLOOR LOS ANGELES, CA 90014	74-1563270	501(C)(3)	6,000	0			ECONOMIC MOBILITY
(48) MOVE LA 525 SOUTH HEWITT STREET LOS ANGELES, CA 90013	95-4302067	501(C)(3)	10,000	0			HOUSING
(49) PATH VENTURES 340 N MADISON AVENUE LOS ANGELES, CA 90004	20-1892523	501(C)(3)	75,000	0			HOUSING
(50) PEOPLE ASSISTING THE HOMELESS (PATH) 340 N MADISON AVENUE LOS ANGELES, CA 90004	95-3950196	501(C)(3)	219,850	0			HOUSING
(51) PROYECTO PASTORAL 135 N MISSION ROAD LOS ANGELES, CA 90033	95-3213958	501(C)(3)	78,500	0			HOUSING
(52) PUBLIC COUNSEL 610 S ARDMORE AVE LOS ANGELES, CA 90005	23-7105149	501(C)(3)	25,000	0			HOUSING
(53) SAFE PLACE FOR YOUTH (SPY) 2469 LINCOLN BLVD VENICE, CA 90291	84-1802637	501(C)(3)	52,500	0			HOUSING
(54) SINGLE ROOM OCCUPANCY HOUSING CORPORATION 1055 W 7TH STREET SUITE 3250 LOS ANGELES, CA 90017	95-3909215	501(C)(3)	65,000	0			HOUSING
(55) SKID ROW HOUSING TRUST 1317 EAST 7TH STREET LOS ANGELES, CA 90021	95-4205316	501(C)(3)	85,000	0			HOUSING
(56) SOCIAL JUSTICE LEARNING INSTITUTE 600 CENTINELA AVE INGLEWOOD, CA 90302	26-3413373	501(C)(3)	50,000	0			HOUSING
(57) SOCIAL VENTURE PARTNERS 800 WILSHIRE BLVD STE 200 LOS ANGELES, CA 90017	51-0563566	501(C)(3)	625,000	0			HOUSING
(58) SOLA I CAN FOUNDATION 918 EAST 60TH STREET LOS ANGELES, CA 90001	82-4698211	501(C)(3)	55,000	0			ECONOMIC MOBILITY
(59) SOUTH BAY CENTER FOR COUNSELING 540 NORTH MARINE AVENUE LOS ANGELES, CA 90744	23-7360521	501(C)(3)	164,988	0			ECONOMIC MOBILITY
(60) SOUTH BAY COUNSELING CENTER (SBCC) PO BOX 4677 OCEANSIDE, CA 92052	23-7431429	501(C)(3)	104,488				EDUCATION
(61) SOUTHERN CALIFORNIA ASSOCIATION OF NONPROFIT 340 E 2ND STREET SUITE 406 LOS ANGELES, CA 90012	95-4019655	501(C)(3)	37,500	0			HOUSING
(62) SSG-HOPICS (SPECIAL SERVICES FOR GROUPS) 905 EAST 8TH STREET LOS ANGELES, CA 90021	95-1716914	501(C)(3)	737,627	0			HOUSING
(63) ST JOSEPH CENTER 204 HAMTON DRIVE VENICE, CA 90291	95-3874381	501(C)(3)	182,275	0			HOUSING
(64) STRATEGIC ACTIONS FOR A JUST ECONOMY 152 W 32ND ST LOS ANGELES, CA 90007	93-1226092	501(C)(3)	25,000	0			HOUSING
(65) TESTIMONIAL COMMUNITY LOVE 5721 S WESTERN AVE LOS ANGELES, CA 90062	95-4376926	501(C)(3)	76,000	0			HOUSING
(66) THE COMMUNITY ACTION LEAGUE 36523 25TH ST EAST R48 PALMDALE, CA 93550	30-0717212	501(C)(3)	44,550	0			ECONOMIC MOBILITY
(67) THE PEOPLE CONCERN 2116 ARLINGTON AVE STE 100 LOS ANGELES, CA 90018	95-6143865	501(C)(3)	288,400	0			HOUSING
(68) THE SALVATION ARMY 180 E OCEAN BLVD SUITE 500 LONG BEACH, CA 90802	13-5562351	501(C)(3)	125,000	0			HOUSING
(69) THE VILLAGE FAMILY SERVICES 6736 LAUREL CANYON BLVD SUITE 200 NORTH HOLLYWOOD, CA 91606	95-4625826	501(C)(3)	100,000	0			HOUSING
(70) THE WHOLE CHILD- MENTAL HEALTH & HOUSING 10155 COLIMA ROAD WHITTIER, CA 90603	95-2031148	501(C)(3)	100,000	0			HOUSING
(71) TRUST SOUTH LA 4331 S MAIN ST LOS ANGELES, CA 90037	42-1687057	501(C)(3)	75,000	0			HOUSING
(72) UNION STATION HOMELESS SERVICES 825 EAST ORANGE GROVE BLVD PASADENA, CA 91104	95-3958741	501(C)(3)	194,875	0			HOUSING
(73) UNIVERSITY OF SOUTHERN CALIFORNIA UNIVERSITY PARK CAMPUS 3551 TROUSDALE PKWY STE 160 LOS ANGELES, CA 90089	95-1642394	501(C)(3)	606,262	0			HOUSING
(74) VOLUNTEERS OF AMERICA OF LOS ANGELES 3600 WILSHIRE BLVD STE 1500 LOS ANGELES, CA 90010	95-1691330	501(C)(3)	287,750	0			ECONOMIC MOBILITY
(75) WATTS LABOR COMMUNITY ACTION CENTER 10950 S CENTRAL AVE LOS ANGELES, CA 90059	95-2412869	501(C)(3)	50,000	0			HOUSING
(76) WEINGART CENTER ASSOCIATION 566 S SAN PEDRO STREET LOS ANGELES, CA 90013	95-6054617	501(C)(3)	165,000	0			HOUSING
(77) YMCA METROPOLITAN LOS ANGELES 625 S NEW HAMPSHIRE AVE LOS ANGELES, CA 90005	95-1644052	501(C)(3)	29,250	0			EDUCATION

2

Enter total number of section 501(c)(3) and government organizations listed in the line 1 table

75

3

Enter total number of other organizations listed in the line 1 table

2

Part IIIGrants 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.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1)					
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					

Part IVSupplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
PART I, LINE 2:	UNITED WAY WORKS TO MONITOR ALL INVESTMENTS MADE THROUGH GRANTS IN ALIGNMENT WITH FUNDING USE AND PROJECT DESIGN. ALL GRANTS HAVE DEFINED SCOPES OF WORK, ESTABLISHED IN CONTRACTS, WHICH CLEARLY IDENTIFY ANY REQUIREMENTS FOR REPORTING AND PARTICIPATION IN EVALUATION PROCESSES. REQUIREMENTS ARE DETERMINED BASED ON THE PURPOSE OF THE GRANT, SIZE OF AWARD, PROJECT TIMELINE, AND OTHER FACTORS. WHERE INTERIM AND FINAL REPORTS ARE REQUIRED DATA AND NARRATIVE RESPONSES ARE COLLECTED AND REVIEWED BY STAFF TO UNDERSTAND PROJECT PROGRESS, CHALLENGES, AND IMPACT. WHERE RELEVANT, ORGANIZATIONAL FINANCIAL DOCUMENTATION AND EXPENSE REPORTING IS COLLECTED AND REVIEWED BY STAFF AND CHALLENGES ARE ADDRESSED.

Additional Data

Return to Form

Software ID:
Software Version:

Name of the organization
UNITED WAY INC

Employer identification number
95-2274801

Part I Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. ☐ First-class or charter travel ☐ Travel for companions ☐ Tax idemnification and gross-up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☐ Health or social club dues or initiation fees ☐ Personal services (e.g., maid, chauffeur, chef)		
1b 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		
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?		
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 ☒ Independent compensation consultant ☒ Form 990 of other organizations ☐ Written employment contract ☒ Compensation survey or study ☒ 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? b Participate in, or receive payment from, a supplemental nonqualified retirement plan? c Participate in, or receive payment from, an equity-based compensation arrangement? 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? b Any related organization? 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? b Any related organization? 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	Yes	
8 Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III		No
9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?		

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				
1ELISE BUIK PRESIDENT & CEO	(i)	359,691	138,750	69,030	217,403	34,699	819,573	66,079
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
2TAULENE KAGAN VP, SPECIAL PROJECTS & INITIATIVES	(i)	184,993	29,355	941	18,233	34,517	268,039	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
3LINING REZENDEZ VP, FINANCE	(i)	185,846	28,620	626	26,422	25,725	267,239	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
4OSCAR CRUZ CHIEF OPERATING OFF. - PART YEAR	(i)	116,980	45,900	24,356	12,482	7,511	207,229	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
5CHRIS KO VP, IMPACT & STRATEGY	(i)	166,184	12,375	317	14,026	6,533	199,435	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
6THOMAS NEWMAN VP, ENGAGEMENT & ACTIVATION	(i)	136,584	8,000	250	5,847	19,730	170,411	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
7DAVID TRAN DIRECTOR, FINANCE	(i)	130,729	4,000	260	6,933	14,636	156,558	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
8CARTER HEWGLEY DIRECTOR, HOMELESSNESS INITIATIVES	(i)	127,964	13,500	258	4,087	6,337	152,146	0
	(ii)	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0	----- 0
9CRISTIAN YANCEY DIRECTOR, MARKETING & EVENTS	(i)	125,330	9,500	405	5,284	10,257	150,776	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 4B	UNITED WAY OF GREATER LOS ANGELES ESTABLISHED A SUPPLEMENTAL EXECUTIVE RETIREMENT PLAN (SERP) FOR ITS CURRENT CEO AND PRESIDENT, ELISE BUIK, AFTER SHE WAS HIRED IN 2005. THIS PLAN WAS APPROVED BY THE BOARD IN JULY 2008 AND \$25,000 WAS FUNDED TO A RABBI TRUST IN DECEMBER 2008. SUBSEQUENTLY ADDITIONAL AMOUNT WAS FUNDED ANNUALLY BASED ON AN ACTUARIAL CALCULATION FOR EXPECTED PAYMENT OBLIGATIONS. THIS PLAN IS ALSO KNOWN AS A BENEFIT RESTORATION PLAN (BRP) AS THE PURPOSE OF THE PLAN IS INTENDED TO "RESTORE" BENEFITS LOST TO AN EMPLOYEE UNDER A TAX-QUALIFIED DEFINED BENEFIT PLAN (E.G., PENSION PLAN) DUE TO INTERNAL REVENUE CODE LIMITS (E.G., LIMITS ON COVERED COMPENSATION, MAXIMUM BENEFIT). FOR CALENDAR YEAR 2021 (THE YEAR WE ARE REQUIRED TO USE FOR 6/30/2022 FORM 990 REPORTING), THE LIMITS ON COVERED COMPENSATION ARE ANNUAL INCOME OF \$290,000. THIS AMOUNT IS ADJUSTED ANNUALLY FOR INFLATION, IT IS \$305,000 IN 2022 AND \$330,000 IN 2023. IN ACCORDANCE WITH THE PLAN DOCUMENT, MS. BUIK MET A VESTING REQUIREMENT THAT WAS ESTABLISHED AS A RETENTION TOOL THAT WOULD TRIGGER A DISTRIBUTION UPON AGE 55; SHE BECAME 100% VESTED IN JANUARY 2019. CONSEQUENTLY, SHE SHOULD RECEIVE AN ANNUAL DISTRIBUTION FROM THIS BRP PLAN. UNITED WAY OF GREATER LOS ANGELES ENGAGE AN ACTUARY FIRM TO CALCULATE THE DISTRIBUTION AMOUNT. IN AUGUST 2021, \$66,079 WAS PAID TO MS. BUIK FOR THE ANNUAL DISTRIBUTION. THIS AMOUNT WAS REPORTED IN HER GROSS WAGES IN FORM 2021 W2, AND IT WAS INCLUDED IN "OTHER REPORTABLE COMPENSATION" COLUMN B (III) ON SCHEDULE J, PART II. THIS ENTIRE AMOUNT WAS ALSO REPORTED AS A DEFERRED COMPENSATION IN FORM 990 FROM PRIOR YEARS AND IT WAS REPORTED IN THIS YEAR'S FORM 990 IN COLUMN F, SCHEDULE J, PART II. THE \$120,072 ESTIMATED INCREASE IN THE VALUE OF THE SERP/BRP IS REPORTED AS DEFERRED COMPENSATION IN COLUMN C, SCHEDULE J, PART II.
PART I, LINE 7	CERTAIN MEMBERS OF THE EXECUTIVE TEAM MET THE CRITERIA TO RECEIVE BONUSES BASED ON THEIR SCORECARD RESULTS. THE SCORECARD WAS APPROVED BY THE BOARD AT THE BEGINNING OF FISCAL YEAR, AND THE RESULTS WERE APPROVED BY THE BOARD EVERY JULY AFTER THE YEAR END. THESE BONUSES WERE INCLUDED IN SCHEDULE J, PART II, COLUMN B (II).

Additional Data

Return to Form

Software ID:
Software Version:

Name of the organization
UNITED WAY INC

Employer identification number
95-2274801

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	15	167,868	FMV
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ► ()				
26 Other ► ()				
27 Other ► ()				
28 Other ► ()				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement

29

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?

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?

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.

Yes

No

30a

No

31

Yes

32a

No

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.

Return Reference	Explanation
SCHEDULE M, PART I, COLUMN (B):	THE ORGANIZATION IS REPORTING THE NUMBER OF CONTRIBUTIONS RECEIVED IN COLUMN (B).

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Name of the organization UNITED WAY INC	Employer identification number 95-2274801
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Return Reference	Explanation
FORM 990, PART III, LINE 4:	STATEMENT OF PURPOSE WHAT WE DO - MOVE OUR MOST VULNERABLE NEIGHBORS OUT OF POVERTY BY: 1. MONITORING DATA 2. INVESTING FUNDS 3. EDUCATING, EMPOWERING, AND ACTIVATING PEOPLE 4. FOCUSING ON SHORT AND LONG-TERM SOLUTIONS, AGGREGATING RESOURCES AND IMPROVING SYSTEMS AND POLICIES 5. MAXIMIZING EFFICIENCIES AND LEVERAGING ALIGNED NETWORKS IN ORDER TO CREATE THE MOST IMPACTFUL RESULTS IN THE AREAS OF HOUSING, EDUCATION AND ECONOMIC MOBILITY. UNITED WAY OF GREATER LOS ANGELES (UWGLA) FOCUSES ON THREE PILLARS THAT ARE CRITICAL TO ADDRESSING POVERTY: HOUSING SOLUTIONS, EDUCATIONAL EQUITY, AND ECONOMIC MOBILITY. THE PRIMARY FOCUS HAS BEEN: 1. INCREASE THE NUMBER OF STUDENTS OF COLOR WHO GRADUATE FROM HIGH SCHOOL PREPARED FOR COLLEGE AND A CAREER. 2. INCREASE TRANSFER AND COMPLETION RATES OF COMMUNITY COLLEGE STUDENTS. 3. PREVENT VULNERABLE FAMILIES AND INDIVIDUALS FROM FALLING INTO HOMELESSNESS. 4. REDUCE STREET AND CHRONIC HOMELESSNESS. 5. EXPAND THE PRODUCTION AND AVAILABILITY OF SUPPORTIVE HOUSING FOR OUR MOST VULNERABLE HOMELESS NEIGHBORS 6. INCREASE THE NUMBER OF VULNERABLE YOUTH AND ADULTS WHO OBTAIN WORKPLACE SKILLS AND ARE CONNECTED TO JOBS. 7. BUILD ECONOMIC EQUITY ACROSS THE REGION BY INCREASING THE ASSETS AND NET WORTH OF LOW-INCOME FAMILIES AND INDIVIDUALS. 8. EXPAND THE CIVIC ENGAGEMENT AND PARTICIPATION OF ALL INDIVIDUALS AND FAMILIES, PARTICULARLY PEOPLE OF COLOR AND YOUTH, TO REDUCE POVERTY AND INEQUITY. THE GLOBAL PANDEMIC CAUSED A SHIFT IN OUR EFFORTS, ENACTING QUICK RESPONSE SOLUTIONS AS THEY RELATE TO OUR THREE PILLARS. IN ADDITION TO THE NEEDS UWGLA HAS BEEN ADDRESSING, WE QUICKLY PIVOTED TO RESPOND BY: 1. MOBILIZING THE REGION TO DONATE AND DIRECT THOSE RESOURCES TO THE VULNERABLE POPULATIONS THAT NEED THEM MOST. PEOPLE ARE READY TO COME TO THE AID OF THE MOST VULNERABLE. WE CHANNEL THOSE EFFORTS TO SUPPORT PEOPLE LIVING OUTSIDE, LOW-WAGE WORKERS AT RISK OF BECOMING HOMELESS, AND LOW-INCOME STUDENTS AND THEIR FAMILIES. 2. PROBLEM-SOLVING THE GAPS IN OUR SYSTEMS. AS OUR PUBLIC AND PRIVATE SECTORS RESPOND, WE PARTNER WITH THEM TO REMOVE OBSTACLES AND BRING ABOUT POLICY CHANGE AND RESOURCES NEEDED TO FILL GAPS. 3. ADVOCATING FOR FEDERAL AND STATE RESOURCES TO GET TO THE MOST VULNERABLE POPULATIONS, MATCHING UP SHORT-TERM AND LONG-TERM NEEDS. UNITED WAY OF GREATER LOS ANGELES HAS ALWAYS BEEN A PLACE WHERE COMMUNITY-BASED ORGANIZATIONS AND ELECTED LEADERS COME TOGETHER TO DO THE MOST GOOD. 4. PROTECTING THE SAFETY AND RIGHTS OF PEOPLE LIVING OUTSIDE. WE ARE WORKING WITH PARTNERS TO BRING EVERYONE IN AS QUICKLY AND SAFELY AS POSSIBLE. FOR THOSE STILL OUTSIDE, WE ARE WORKING TO ENSURE THEIR HEALTH AND SAFETY AS WELL. SCALING SOLUTIONS IMPROVING POLICY AND DRIVING SYSTEMS CHANGE IS A CRITICAL PART OF THE WORK WE DO AT UNITED WAY. IN A REGION AS LARGE, COMPLEX AND FRAGMENTED AS LOS ANGELES COUNTY, SYSTEMS CHANGE IS THE ONLY WAY TO SCALE LONG-TERM SOLUTIONS THAT TRULY BREAK THE CYCLE OF POVERTY. WE ADVOCATE FOR AND INFLUENCE PUBLIC POLICY, DEMANDING SOLUTIONS THAT PROVIDE LASTING CHANGE AND WE MAKE LONG-TERM COMMITMENTS TO IMPLEMENTING THEM. WE ALSO RESEARCH SOCIAL PROBLEMS TO DELIVER DATA AND EVIDENCE-BASED SOLUTIONS THAT DEMONSTRATE REAL OUTCOMES. LEVERAGING PARTNERSHIPS SOLVING COMPLEX PROBLEMS LIKE POVERTY CAN'T BE DONE BY THE POWER OF ONE, ESPECIALLY IN THE WAKE OF THE PANDEMIC IT REQUIRES THE POWER OF MANY. THAT'S WHY WE FOCUS ON BRINGING PEOPLE TOGETHER TO WORK ON OUR REGION'S MOST DIFFICULT ISSUES. WE WORK ALONGSIDE WITH PUBLIC, PRIVATE AND NON-PROFIT SECTORS TO TACKLE THE ROOT CAUSES OF POVERTY, WHICH WERE FURTHER EXACERBATED WHEN BUSINESSES AND SCHOOLS BEGAN TO CLOSE IN MARCH OF 2020. WE BUILD ON PROGRAMS AND STRATEGIES THAT IMPACT AND INFLUENCE A GREATER NUMBER OF NEIGHBORS AND COMMUNITIES, ESPECIALLY THOSE MOST IMPACTED, WORKING TOGETHER TO ADDRESS THE IMMEDIATE NEEDS THAT SURFACED. MAKING COMMUNITY IMPACT THROUGH OUR GRANTS, WE INVEST IN LOCAL NONPROFITS AND PROGRAMS WHICH WILL HAVE THE GREATEST IMPACT IN REACHING OUR GOALS TO END POVERTY, EXPANDING THEIR RESOURCES TO MEET THE NEEDS OF THE MOST VULNERABLE PEOPLE IN OUR COMMUNITIES. WE ANNUALLY INVEST IN 150 HIGH-PERFORMING NONPROFIT PARTNERS ALIGNED WITH THE GOALS IN OUR THREE PILLARS, MUCH OF WHICH SHIFTED TO EXPAND SUPPORT TO NEW NONPROFIT PARTNERS. AS WE LOOK TOWARD AN EQUITABLE RECOVERY, WE WILL INVEST IN CAPACITY BUILDING FOR OUR PARTNERS, PROVIDE GRANTS TO ENSURE TRUSTED COMMUNITY ORGANIZATIONS ARE STABLE, AND PRIORITIZE GRANTMAKING TO ORGANIZATIONS THAT ARE LED BY AND SERVE BLACK, BROWN, AND INDIGENOUS COMMUNITIES. THIS IS A PIVOTAL MOMENT IN LOS ANGELES COUNTY TO RECOVER AND REBUILD, AND WE WANT TO PRIORITIZE OUR MOST VULNERABLE. RATHER THAN MAINTAINING INEFFECTIVE MODELS THAT DEEPEN RACIAL AND ECONOMIC INEQUITIES, WE HAVE AN OPPORTUNITY TO TRANSFORM. WE WANT TO CONTINUE MAKING BOLD INVESTMENTS IN EDUCATION, HOMELESS SERVICES, AND STABILITY FOR OUR WORKING FAMILIES.
FORM 990, PART III, LINE 4A:	PROGRAM SERVICE ACTIVITY - ENDING HOMELESS THROUGH HOUSING STABILITY GOAL CREATE AND SUSTAIN AN END TO HOMELESSNESS OUR WORK AND RESULTS MORE THAN 66,000 MEN, WOMEN, CHILDREN AND VETERANS DO NOT HAVE A SAFE PLACE TO SLEEP AT NIGHT. UNITED WAY OF GREATER LOS ANGELES WORKS TO ENSURE SAFE, STABLE AND AFFORDABLE NEIGHBORHOODS FOR ANGELENOS TO CALL HOME. UNITED WAY IS TURNING THE LESSONS OF THE PANDEMIC CRISIS INTO BOLD PROGRAMS THAT HELP OUR NEIGHBORS EXPERIENCING HOMELESSNESS AND LIGHT THE PATH OUT OF THE HOUSING CRISIS FOR ALL. KEY EFFORTS INCLUDE A COMPREHENSIVE PLAN TO ADDRESS UNSHELTERED HOMELESSNESS THROUGH THE STREET STRATEGY FOR L.A. COUNTY, IMMEDIATE AND LONG-TERM HEALTHCARE THROUGH THE HEALTH PATHWAYS EXPANSION GRANTS, AND A SPECIAL FOCUS ON ENDING HOMELESSNESS AMONG SENIORS AND OLDER ADULTS. - THE HEALTH PATHWAYS EXPANSION PROVIDED HEALTHCARE SERVICES TO 23 PROJECT ROOMKEY SITES, SERVING OVER 2,864 PATIENTS. - THE PROJECT ALSO SUPPORTED MORE THAN 3,492 CARE CONTACTS THROUGH 16 FEDERALLY QUALIFIED HEALTH CENTER GRANTEEES THROUGHOUT THE COUNTY. A SECOND PROJECT IN THIS TIME PERIOD WAS THE ORGANIZATION'S WORK TO SUPPORT THE PASSAGE OF MEASURE J, A LOS ANGELES COUNTY BALLOT MEASURE THAT MANDATES AT LEAST 10% OF THE COUNTY'S ANNUAL UNRESTRICTED REVENUES ARE SPENT ON ALTERNATIVES TO INCARCERATION AND INVESTMENT IN UNDER RESOURCED COMMUNITIES. THE NEXUS BETWEEN OUR WORK TO END HOMELESSNESS AND THIS MEASURE WAS CLEAR - THE REVOLVING DOOR BETWEEN COUNTY JAIL AND SAFETY NETS SYSTEMS AND HOMELESSNESS IS WELL DOCUMENTED. UWGLA HELPED TO LEAD THE LOCAL BALLOT MEASURE ELECTORAL CAMPAIGN AND SPECIFICALLY SUPPORTED WITH FUNDRAISING, COALITION DEVELOPMENT,

Return Reference	Explanation
	COMMUNICATIONS TACTICS. HOUSING NOT ONLY ENDS HOMELESSNESS, IT PREVENTS IT. THE LEADING DRIVER OF HOMELESSNESS IS A LACK OF AFFORDABLE HOUSING, AND LA COUNTY LOST NEARLY 200,000 UNITS THAT RENT FOR LESS THAN \$1,000 PER MONTH IN THE LAST DECADE. AS A RESULT, NEARLY ONE-THIRD OF LA RENTERS SPEND MORE THAN HALF THEIR INCOME ON HOUSING WITH THIS BURDEN MOST HEAVILY FALLING ON BLACK AND LATINX RESIDENTS: 67% OF BLACK RESIDENTS AND 62% OF LATINX RESIDENTS ARE RENTERS. ACCELERATING PERMANENT SUPPORTIVE HOUSING COMPETITION (APSH) BRINGS BOLD MODELS TO SCALE. IN SPRING 2019, UNITED WAY OF GREATER LOS ANGELES AWARDED \$5 MILLION IN GRANTS TO 16 BOLD PROJECTS THROUGH APSH. BY STRATEGICALLY ALIGNING AWARDS BETWEEN BOTH COUNTY AND CITY OF LOS ANGELES EFFORTS, UWGLA WAS ABLE TO MAXIMIZE OUR IMPACT. FIRST, L.A. COUNTY'S HOUSING INNOVATION CHALLENGE BROUGHT NUMEROUS NEW DESIGNS AND CREATIVE CONCEPTS TO LIGHT. APSH HELPED BRIDGE PUBLIC OPPORTUNITIES, SUPPORTING DEVELOPERS IN FURTHERING CREATIVE CONCEPTS. IN TURN, FUNDS HELPED DEVELOP CONCEPTS INTO INCREASINGLY EFFECTIVE AND ACHIEVABLE BUILDING DESIGNS, ALLOWING GRANTEES TO APPLY TO THE CITY OF LOS ANGELES'S HHH HOUSING CHALLENGE FOR CONSTRUCTION FUNDS. STATS: 16 DEVELOPERS RECEIVED AWARDS FOR APSH PROJECTS WITH AN ESTIMATED 1400 SUPPORTIVE TO BE CONSTRUCTED OVER THE NEXT SEVERAL YEARS.
FORM 990, PART III, LINE 4B:	PROGRAM SERVICE ACTIVITY - HELPING STUDENTS GRADUATE AND PREPARE FOR COLLEGE AND THE WORKFORCE GOAL INCREASE HIGH SCHOOL GRADUATION RATES, ENSURING ALL STUDENTS GRADUATE, PREPARED FOR COLLEGE AND CAREER OUR WORK AND RESULTS THE PANDEMIC EXAGGERATED EXISTING CHALLENGES FOR LOW-INCOME STUDENTS AND THEIR FAMILIES INCLUDING EDUCATIONAL OPPORTUNITIES. ON AVERAGE, LATINX AND BLACK STUDENTS AT LAUSD WERE LESS ACTIVE IN ONLINE CLASSES WITH 67% OF BLACK AND LATINX MIDDLE SCHOOLERS ACTIVE IN ONLINE SCHOOLING COMPARED TO 88-89% OF THEIR WHITE AND ASIAN PEERS. THE VIRTUAL MODEL ILLUMINATED THE INEQUITIES FACING OUR MOST VULNERABLE STUDENTS, RANGING FROM LACK OF INTERNET, ADEQUATE TECHNOLOGY EQUIPMENT, MANAGING SIBLINGS AND HOUSEHOLDS WHILE PARENTS WERE WORKING, AND ISOLATION AND FEAR DUE TO THE PANDEMICS EFFECTS ON THEIR FAMILIES. UWGLA FOCUSED ON SUPPORTING PARTNER ORGANIZATIONS TO MEET THE IMMEDIATE AND LONG TERM NEEDS OF STUDENTS AND PARENTS TO HELP BRIDGE THE DIGITAL DIVIDE WITH LEARNING AND RESOURCES OF SUPPORT THROUGH OUR TRANSFORMED INITIATIVE. TRANSFORMED TESTED A DOZEN INNOVATIVE EDUCATION MODELS CENTERED ON EQUITY TO HELP L.A. STUDENTS, TEACHERS AND PARENTS SURVIVE AND THRIVE THROUGH THE PANDEMIC RESULTING IN DIRECT RELIEF IN MENTAL HEALTH, SELF CARE, FAMILY WELL-BEING AND ACADEMIC SUPPORT. THE PANDEMIC BROUGH ADDITIONAL CHALLENGES TO THE FAMILY FROM JOB LOSS TO TEMPORARY DISPLACEMENT, LOSS OF POSSESSIONS AND EVEN THE LOSS OF A FAMILY MEMBER DUE TO COVID-19. GILDA'S FAMILY RECEIVED BOTH EMOTIONAL AND ECONOMIC SUPPORT THROUGH GROCERY GIFT CARDS, ESSENTIAL ITEMS, RENTAL ADVOCACY, MENTAL HEALTH SUPPORT AND MOST IMPORTANTLY A CARING RELATIONSHIP WITH HOLA STAFF. TRANSFORMED TESTED A DOZEN INNOVATIVE EDUCATION MODELS CENTERED ON EQUITY TO HELP L.A. STUDENTS, TEACHERS AND PARENTS SURVIVE AND THRIVE THROUGH THE PANDEMIC. TRANSFORMED HELPED HOLA ESTABLISH ITS FAMILY SERVICES DEPARTMENT THAT RECOGNIZES THAT STUDENTS NEED STABILITY IN ORDER TO HAVE ACADEMIC SUCCESS AND PROVIDED SUPPORT TO HUNDREDS OF FAMILIES LIKE GILDA'S. ADDITIONAL EDUCATION PARTNERS LIKE COMMUNITIES IN SCHOOLS. LOS ANGELES ALSO PIVOTED THEIR WORK TO PROVIDE DIRECT RELIEF TO STUDENTS AND THEIR FAMILIES. - OVERALL TRANSFORMED GRANTEES WORKED DIRECTLY WITH OVER 40,000 STUDENTS, FAMILIES, AND TEACHERS TO ADDRESS THE UNIQUE CHALLENGES FACED DURING THE PANDEMIC. - LEARNING PODS PROVIDED MORE THAN 250 WILMINGTON STUDENTS WITH SAFE SPACES TO LEARN WHERE STUDENTS COULD LOG ON TO DO THEIR SCHOOL WORK, GET TUTORING AND HAVE HOT MEALS.
FORM 990, PART III, LINE 4C:	PROGRAM SERVICE ACTIVITY - ENSURING ECONOMIC MOBILITY THROUGH JOBS AND FINANCIAL COACHING. GOAL BREAK THE CYCLE OF INTERGENERATION POVERTY. OUR WORK AND RESULTS UNITED WAY OF GREATER LOS ANGELES AIMS TO CREATE A MORE INCLUSIVE AND FAIR ECONOMY. THIS INCLUDES EQUAL ACCESS TO FUNDING, OPPORTUNITY TO BE ENTREPRENEURIAL, AND SUPPORTIVE ENTRY INTO CURRENT AND EMERGING INDUSTRIES. IN LA COUNTY, 60% OF BLACK HOUSEHOLDS AND OVER 70% OF LATINX HOUSEHOLDS REPORTED EXPERIENCING "SERIOUS FINANCIAL PROBLEMS" DURING THE PANDEMIC. TO HELP FAMILIES STABILIZE AND BREAK THE CYCLE OF INTERGENERATIONAL POVERTY, UNITED WAY CONTINUES TO PROVIDE DIRECT RELIEF THROUGH RENTAL AND UTILITIES ASSISTANCE TO KEEP PEOPLE IN THEIR HOMES. PROGRAMS LIKE VOLUNTEER INCOME TAX ASSISTANCE (VITA) PUT MONEY BACK IN THE POCKETS OF WORKING FAMILIES BY UNLOCKING TAX CREDITS. LAST YEAR, WE SUPPORTED UNITED WAYS OF CALIFORNIA IN THEIR EFFORTS TO EXPAND THE CALIFORNIA EARNED INCOME TAX CREDIT (CALEITC) AND ENACT THE YOUNG CHILD TAX CREDIT TO HELP CALIFORNIA FAMILIES FINANCIALLY RECOVER FROM THE PANDEMIC. FAMILIES LIKE ANA'S MAY QUALIFY FOR UP TO \$10,000 FROM THESE TAX CREDITS. UWGLA PARTNERS WITH TRUSTED, COMMUNITY-BASED ORGANIZATIONS LIKE MAOF AND EL CENTRO DE AYUDA TO HELP INDIVIDUALS AND FAMILIES TO SUBMIT THEIR TAX RETURNS BOTH IN PERSON AND VIRTUALLY. THROUGHOUT THE PAST TWO YEARS, UWGLA HAS TAKEN THIS WORK EVEN FURTHER TO HELP IDENTIFY, TRAIN, AND PROVIDE STIPENDS TO LOS ANGELES CITY COLLEGE STUDENT VOLUNTEERS TO HELP WITH TAX SEASON. THE PROGRAM FOCUSES ON RECRUITING FIRST-GENERATION STUDENTS, DREAMERS, AND MULTILINGUAL VOLUNTEERS TO HELP SERVE DIVERSE POPULATIONS THROUGHOUT THE REGION. STATS: THE EFFORTS OF UWGLA'S VITA VOLUNTEERS HELPED OUR PARTNERS CONNECT MORE FAMILIES WITH TAX PREPARATION SERVICES, A SMALL FRACTION OF THE LARGE IMPACT VITA HAS ON WORKING FAMILIES: - 17 VOLUNTEERS PERFORMED 485 HOURS OF TAX PREP SERVICES IN PARTNERSHIP WITH 7 ORGANIZATIONS. - APPROXIMATELY 970 TAX RETURNS WERE FILED WITH AN AVERAGE RETURN OF \$1,842 TO CLIENTS WITH A ROUGHLY \$1.78 MILLION IN REFUNDS CLAIMED OVERALL.
FORM 990, PART VI, SECTION B, LINE 11B	ONCE THE FORM 990 HAS BEEN COMPLETED BY STAFF AND REVIEWED BY PROFESSIONAL TAX PREPARERS, THE DOCUMENT WAS SENT ELECTRONICALLY IN APRIL 2023 TO THE MEMBERS OF THE AUDIT COMMITTEE. THE COMMITTEE MEMBERS REVIEWED THE DOCUMENT AS PART OF A MEETING ON APRIL 13, 2023. THE COMMITTEE THEN REVIEWED AND ACCEPTED THE DOCUMENT. THE FORM 990 WAS THEN SENT ELECTRONICALLY TO EACH BOARD MEMBER. THE FORM 990 IS SCHEDULED TO BE FILED BY MAY 15, 2023.
FORM 990, PART VI, SECTION B, LINE 12C	ANNUALLY, BOARD MEMBERS AND MEMBERS OF CERTAIN COMMITTEES ARE PROVIDED A COPY OF THE CONFLICT OF INTEREST POLICY AND A QUESTIONNAIRE THAT ELICITS RESPONSES TO A VARIETY OF QUESTIONS RELATED TO ANY ACTUAL OR PERCEIVED CONFLICTS OF INTEREST IN THEIR ROLE. THE QUESTIONNAIRES ARE REVIEWED, AND ANY POTENTIAL CONFLICTS ARE DISCUSSED AND FURTHER DOCUMENTED. IN THE VERY LIMITED NUMBER OF CASES WHERE A BOARD MEMBER OF THE FIRMS THAT THEY REPRESENT ARE PAID FOR SERVICES, THE BOARD APPROVES THE POTENTIAL CONFLICT OF INTEREST. IN THE CASES WHERE A BOARD MEMBER HAS A RELATIONSHIP WITH AN ORGANIZATION THAT RECEIVES GRANT FUNDING FROM UNITED WAY, THE BOARD MEMBER RECUSES HERSELF/HIMSELF FROM ANY DISCUSSIONS RELATED TO THE POTENTIAL CONFLICT OF INTEREST. STAFF RECEIVE AND SIGN THE SAME POLICY AND QUESTIONNAIRE.

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FORM 990, PART VI, SECTION B, LINE 15	THE HUMAN RESOURCES COMMITTEE, OF THE BOARD OF UNITED WAY OF GREATER LOS ANGELES, AIMS TO FULLY DISCLOSE THE COMPENSATION PAID OUT IN AN OPEN AND TRANSPARENT MANNER WHICH IS CONSISTENT WITH BEST PRACTICES AND APPLICABLE REGULATORY REQUIREMENTS, AND ESTABLISHES A "REBUTTABLE PRESUMPTION" OF REASONABLENESS. TO THAT END, THIS REPORT PROVIDES INFORMATION ON UNITED WAY OF GREATER LOS ANGELES' GOVERNANCE AND OVERSIGHT OF EXECUTIVE COMPENSATION AND GENERAL COMPENSATION PHILOSOPHY GENERAL COMPENSATION PHILOSOPHY THE PRIMARY OBJECTIVE OF UWGLA'S COMPENSATION POLICY IS TO PROVIDE REASONABLE AND COMPETITIVE TOTAL COMPENSATION OPPORTUNITIES TO EXECUTIVES, CONSISTENT WITH MARKET-BASED COMPENSATION PRACTICES FOR INDIVIDUALS POSSESSING THE EXPERIENCE AND SKILLS NEEDED TO IMPROVE THE OVERALL PERFORMANCE OF THE ORGANIZATION. THE ORGANIZATION'S EXECUTIVE COMPENSATION PROGRAM IS DESIGNED TO: - PROVIDE BASE COMPENSATION AT THE MEDIAN OF THE LOCAL MARKET; OR, NATIONAL MARKET DEPENDING ON THE NATURE OF THE EXECUTIVE POSITION - PROVIDE TOTAL COMPENSATION POTENTIAL IN A RANGE BETWEEN 25TH TO 75TH PERCENTILE THROUGH ITS VARIABLE PERFORMANCE PAY PLAN, DEPENDING ON THE NATURE AND EXPERIENCE OF THE EXECUTIVE POSITION - BE FLEXIBLE TO REWARD INDIVIDUAL ACCOMPLISHMENTS AS WELL AS ORGANIZATIONAL SUCCESS - ENCOURAGE THE ATTRACTION AND RETENTION OF HIGH CALIBER EXECUTIVES - PROVIDE A COMPETITIVE TOTAL COMPENSATION PACKAGE, INCLUDING BENEFITS - BALANCE THE NEED TO BE COMPETITIVE WITHIN THE LIMITS OF AVAILABLE FINANCIAL RESOURCES - ENSURE THAT PAY IS PERCEIVED TO BE FAIR AND EQUITABLE - ENSURE THAT THE PROGRAM IS EASY TO EXPLAIN, UNDERSTAND AND ADMINISTER - ENSURE THAT PROGRAM COMPLIES WITH STATE AND FEDERAL LEGISLATION, IS CONSISTENT, AND FREE OF DISCRIMINATION IN ORDER TO REINFORCE PAY-FOR-PERFORMANCE AND TO ENSURE A FOCUS ON THE UWGLA MISSION, THE HUMAN RESOURCES COMMITTEE (HR COMMITTEE) BELIEVES A PORTION OF EXECUTIVE COMPENSATION SHOULD BE VARIABLE AND TIED TO PERFORMANCE. AS SUCH, THE HR COMMITTEE HAS INSTITUTED A PERFORMANCE PAY PLAN WHICH PROVIDES THE CEO, OTHER CHIEF OFFICERS, AND VICE PRESIDENTS THE OPPORTUNITY TO EARN PERFORMANCE AWARDS BASED ON SUCCESSFULLY PRODUCING THE RESULTS DETERMINED ANNUALLY IN UWGLA'S PERFORMANCE SCORECARD. THE ANNUAL GOALS WHICH FORM THE SCORECARD ARE TIED DIRECTLY TO OUR MISSION OF CREATING PATHWAYS OUT OF POVERTY AND LONG-TERM ORGANIZATIONAL GOALS. THE HR COMMITTEE STRIVES TO PROVIDE MARKET COMPETITIVE BASE SALARIES FOR COMPARABLE POSITIONS AND PERIODICALLY COMMISSIONS AN INDEPENDENT CONSULTING FIRM TO REVIEW CEO, OTHER CHIEF OFFICERS, AND VICE PRESIDENTS' COMPENSATION TO ENSURE THE COMPENSATION PROGRAMS AND LEVELS REFLECT THE COMMITTEE'S COMMITMENT TO ALIGN COMPENSATION WITH ORGANIZATION GOALS, OBJECTIVES, AND PERFORMANCE. IN THOSE YEARS WHERE AN INDEPENDENT CONSULTANT IS NOT ENGAGED, THE HUMAN RESOURCES COMMITTEE RELIES ON GENERAL MARKET CONDITIONS TO MAKE ANY CHANGES TO THE EXECUTIVE COMPENSATION PROGRAM. ON AN ANNUAL BASIS, THE COMMITTEE IS RESPONSIBLE FOR EVALUATING THE PERFORMANCE OF THE CEO AND RECOMMENDING TO THE FULL BOARD FOR APPROVAL AND ADJUSTMENTS TO THIS COMPENSATION AND BENEFITS, INCLUDING INCENTIVE OR PERFORMANCE PAY AWARDS. THE COMMITTEE IS ALSO RESPONSIBLE FOR REVIEWING AND RECOMMENDING TO THE FULL BOARD FOR APPROVAL ANY NEW COMPENSATION OR BENEFITS PLANS OR PROGRAMS, OR ANY CHANGES TO EXISTING PLANS AND PROGRAMS THAT RELATE TO THE CEO, OTHER CHIEF OFFICERS OR THE VICE PRESIDENTS.
FORM 990, PART VI, SECTION C, LINE 19	ANNUAL FINANCIAL STATEMENTS ARE AVAILABLE THROUGH THE ORGANIZATION'S WEBSITE. WE MAKE OUR CONFLICT OF INTEREST POLICY AND BYLAWS AVAILABLE UPON REQUEST.
FORM 990, PART XI, LINE 9:	CHANGE IN ADDITIONAL PENSION LIABILITY - UNITED WAY HAS A DEFINED BENEFIT, NONCONTRIBUTORY PENSION PLAN COVERING SUBSTANTIALLY ALL OF ITS REGULAR EMPLOYEES. ACCOUNTING STANDARDS CODIFICATION TOPIC 715 REQUIRES EMPLOYERS TO RECOGNIZE NON-CASH PERIODIC PENSION EXPENSE, CHANGES IN THE OVERFUNDED STATUS AND ACTUARIAL VALUATION OF THE PLAN IN THE YEAR IN WHICH THE EXPENSE AND CHANGES OCCUR THROUGH CHANGES IN NET ASSETS. THAT AMOUNT WAS \$1,864,843 IN THE CURRENT YEAR.
FORM 990, PART IX, LINE 11G	OTHER FEES INCLUDE DIGITAL COMMUNICATIONS ON OUR ADVOCACY WORK, EVENTS, PRODUCTIONS, COMMUNICATIONS, AND CONSULTING EXPENSES RELATED TO OUR CENTENNIAL CELEBRATION AND CAMPAIGN, STRATEGIC PLANNING AND OTHER PROFESSIONAL FEES RELATED TO OUR PROGRAMMATIC WORK. MAJORITY OF THESE EXPENSES ARE FUNDED BY VARIOUS GRANTS.
COVID-19 DISCLOSURE	IN MARCH 2020, THE WORLD HEALTH ORGANIZATION DECLARED THE OUTBREAK OF A NOVEL CORONAVIRUS (COVID-19) AS A PANDEMIC, WHICH CONTINUES TO SPREAD THROUGHOUT THE UNITED STATES. THE SPREAD OF COVID-19 HAS CAUSED SIGNIFICANT VOLATILITY IN THE U.S. AND INTERNATIONAL MARKETS. THERE IS SIGNIFICANT UNCERTAINTY AROUND THE BREADTH AND DURATION OF BUSINESS DISRUPTIONS RELATED TO COVID-19, AS WELL AS ITS IMPACT ON THE U.S. AND INTERNATIONAL ECONOMIES. UNITED WAY CANNOT REASONABLY ESTIMATE THE LENGTH AND SEVERITY OF THIS PANDEMIC, BUT THE ORGANIZATION CURRENTLY ANTICIPATES A DECLINE IN ANNUAL WORKPLACE CAMPAIGN GIVING AND AN INCREASE IN UNCOLLECTIBLE PLEDGES OVER THE NEXT FEW YEARS.

Additional Data

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