Form **990**

Department of the Treasury
Internal Revenue Service

# Return of Organization Exempt From Income Tax

**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)**
**Do not enter social security numbers on this form as it may be made public.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2025**

**Open to Public Inspection**

**A For the 2025 calendar year, or tax year beginning** **and ending**

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

**C** Name of organization
UNITED WAY WORLDWIDE

Doing business as

Number and street (or P.O. box if mail is not delivered to street address) | Room/suite
701 NORTH FAIRFAX STREET

City or town, state or province, country, and ZIP or foreign postal code
ALEXANDRIA, VA 22314

**F** Name and address of principal officer: LADAWN NAEGLE
SAME AS C ABOVE

**D Employer identification number**
13-1635294

**E** Telephone number
703-836-7100

**G** Gross receipts $ 80,201,406.

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

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

**H(c)** Group exemption number

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

**J Website:** WWW.UNITEDWAY.ORG

**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other

**L** Year of formation: 1932

**M** State of legal domicile: NY

## Part I Summary

**Activities & Governance**

1 Briefly describe the organization's mission or most significant activities: TO IMPROVE LIVES BY MOBILIZING CARING POWER OF COMMUNITIES AROUND THE WORLD TO ADVANCE COMMON GOOD.

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

| | | | |
|---|---|---|---|
| 3 | Number of voting members of the governing body (Part VI, line 1a) | 3 | 20 |
| 4 | Number of independent voting members of the governing body (Part VI, line 1b) | 4 | 20 |
| 5 | Total number of individuals employed in calendar year 2025 (Part V, line 2a) | 5 | 262 |
| 6 | Total number of volunteers (estimate if necessary) | 6 | 78 |
| 7a | Total unrelated business revenue from Part VIII, column (C), line 12 | 7a | 0. |
| b | Net unrelated business taxable income from Form 990-T, Part I, line 11 | 7b | 0. |

**Revenue**

| | | Prior Year | Current Year |
|---|---|---|---|
| 8 | Contributions and grants (Part VIII, line 1h) | 41,046,025. | 41,781,786. |
| 9 | Program service revenue (Part VIII, line 2g) | 29,724,255. | 35,218,003. |
| 10 | Investment income (Part VIII, column (A), lines 3, 4, and 7d) | 983,417. | 385,655. |
| 11 | Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) | 643,920. | 609,875. |
| 12 | Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | 72,397,617. | 77,995,319. |

**Expenses**

| | | | |
|---|---|---|---|
| 13 | Grants and similar amounts paid (Part IX, column (A), lines 1-3) | 22,424,325. | 32,303,151. |
| 14 | Benefits paid to or for members (Part IX, column (A), line 4) | 0. | 0. |
| 15 | Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | 30,793,646. | 35,593,467. |
| 16a | Professional fundraising fees (Part IX, column (A), line 11e) | 0. | 0. |
| b | Total fundraising expenses (Part IX, column (D), line 25) 9,998,268. | | |
| 17 | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | 21,798,697. | 25,275,266. |
| 18 | Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | 75,016,668. | 93,171,884. |
| 19 | Revenue less expenses. Subtract line 18 from line 12 | -2,619,051. | -15,176,565. |

**Net Assets or Fund Balances**

| | | Beginning of Current Year | End of Year |
|---|---|---|---|
| 20 | Total assets (Part X, line 16) | 67,977,328. | 53,624,972. |
| 21 | Total liabilities (Part X, line 26) | 19,887,562. | 26,140,567. |
| 22 | Net assets or fund balances. Subtract line 21 from line 20 | 48,089,766. | 27,484,405. |

## Part II Signature Block

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

**Sign Here**

Signature of officer — Date

LADAWN NAEGLE, EVP, CHIEF OF STAFF
Type or print name and title

**Paid Preparer Use Only**

| Preparer's name | Preparer's signature | Date | Check if self-employed | PTIN |
|---|---|---|---|---|
| MARY O TORRETTA | | | ☐ | P00847851 |

Firm's name GRANT THORNTON ADVISORS LLC — Firm's EIN 99-1856619

Firm's address 1000 WILSON BLVD, SUITE 1500
ARLINGTON, VA 22209 — Phone no. 703-847-7500

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

## Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:
SEE SCHEDULE O

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ..... Yes X 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 X 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 $ 38,273,048. including grants of $ 17,109,780. ) (Revenue $ 790,353. )
GLOBAL NETWORK ADVANCEMENT-SEE SCHEDULE O

4b (Code: ) (Expenses $ 10,817,156. including grants of $ 10,128,867. ) (Revenue $ 0. )
DONOR ADVISED GIVING (DOMESTIC AND INTERNATIONAL)-SEE SCHEDULE O

4c (Code: ) (Expenses $ 13,794,163. including grants of $ 9,125. ) (Revenue $ 1,268,375. )
BRAND STRATEGY AND MARKETING-SEE SCHEDULE O

4d Other program services (Describe on Schedule O.)
(Expenses $ 9,439,088. including grants of $ 5,055,379. ) (Revenue $ 33,459,740. )

4e Total program service expenses 72,323,455.

## 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 | X | |
| 2 | Is the organization required to complete *Schedule B, Schedule of Contributors*? See instructions | 2 | X | |
| 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 | | X |
| 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 | X | |
| 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 | | X |
| 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 | X | |
| 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 | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III* | 8 | | X |
| 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 | X | |
| 10 | Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? *If "Yes," complete Schedule D, Part V* | 10 | X | |
| 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 | X | |
| 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 | | X |
| 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 | | X |
| 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 | X | |
| e | Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X* | 11e | X | |
| f | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X* | 11f | X | |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII* | 12a | | X |
| 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 | X | |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E* | 13 | | X |
| 14a | Did the organization maintain an office, employees, or agents outside of the United States? | 14a | X | |
| 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 | X | |
| 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 | X | |
| 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 | | X |
| 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 | | X |
| 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 | | X |
| 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 | | X |
| 20a | Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H* | 20a | | X |
| 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 | X | |

**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 | | X |
| 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 | X | |
| 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 | | X |
| 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 | | X |
| 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 | | X |
| 26 | Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part II* | 26 | | X |
| 27 | Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? *If "Yes," complete Schedule L, Part III* | 27 | | X |
| 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 | | X |
| b | A family member of any individual described in line 28a? *If "Yes," complete Schedule L, Part IV* | 28b | | X |
| 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 | | X |
| 29 | Did the organization receive more than $25,000 in noncash contributions? *If "Yes," complete Schedule M* | 29 | X | |
| 30 | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M* | 30 | | X |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I* | 31 | | X |
| 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 | | X |
| 33 | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? *If "Yes," complete Schedule R, Part I* | 33 | X | |
| 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 | X | |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a | X | |
| 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 | X | |
| 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 | | X |
| 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 | | X |
| 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 | X | |

**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 | 84 | | |
| 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 | | X | |

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

| | | | | Yes | No |
|---|---|---|---|---|---|
| **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** | 262 | | |
| **b** | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? | | **2b** | X | |
| **3a** | Did the organization have unrelated business gross income of $1,000 or more during the year? | | **3a** | | X |
| **b** | If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation on Schedule O* | | **3b** | | |
| **4a** | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | | **4a** | X | |
| **b** | If "Yes," enter the name of the foreign country CHINA, SWITZERLAND, HONG KONG<br>See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). | | | | |
| **5a** | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | | **5a** | | X |
| **b** | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | | **5b** | | X |
| **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** | | X |
| **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** | | X |
| **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** | | X |
| **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** | | X |
| **f** | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | **7f** | | X |
| **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** | | X |
| **9** | **Sponsoring organizations maintaining donor advised funds.** | | | | |
| **a** | Did the sponsoring organization make any taxable distributions under section 4966? | | **9a** | | X |
| **b** | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | **9b** | | X |
| **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?<br>**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** | | X |
| **b** | If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation on 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?<br>If "Yes," see the instructions and file Form 4720, Schedule N. | | **15** | | X |
| **16** | Is the organization an educational institution subject to the section 4968 excise tax on net investment income?<br>If "Yes," complete Form 4720, Schedule O. | | **16** | | X |
| **17** | **Section 501(c)(21) organizations.** Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953?<br>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 line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.*

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

## 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 ..... | 1a | 20 | | |
| | 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 on Schedule O. | | | | |
| b | Enter the number of voting members included on line 1a, above, who are independent ..... | 1b | 20 | | |
| 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 | | | X |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? ..... | 3 | | | X |
| 4 | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? ..... | 4 | | | X |
| 5 | Did the organization become aware during the year of a significant diversion of the organization's assets? ..... | 5 | | | X |
| 6 | Did the organization have members or stockholders? ..... | 6 | | X | |
| 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 | | X | |
| b | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? ..... | 7b | | X | |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | | |
| a | The governing body? ..... | 8a | | X | |
| b | Each committee with authority to act on behalf of the governing body? ..... | 8b | | X | |
| 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 on Schedule O* ..... | 9 | | | X |

## 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 | | X |
| b | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? ..... | 10b | | |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | 11a | X | |
| b | Describe on Schedule O the process, if any, used by the organization to review this Form 990. | | | |
| 12a | Did the organization have a written conflict of interest policy? *If "No," go to line 13* ..... | 12a | X | |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? ..... | 12b | X | |
| c | Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe on Schedule O how this was done* ..... | 12c | X | |
| 13 | Did the organization have a written whistleblower policy? ..... | 13 | X | |
| 14 | Did the organization have a written document retention and destruction policy? ..... | 14 | X | |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | | |
| a | The organization's CEO, Executive Director, or top management official ..... | 15a | X | |
| b | Other officers or key employees of the organization ..... | 15b | X | |
| | 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 | X | |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? ..... | 16b | X | |

## Section C. Disclosure

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

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

X Own website ☐ Another's website X Upon request ☐ Other *(explain on Schedule O)*

19 Describe on 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

BRUCE FRIEDMAN - 703-836-7100

701 N. FAIRFAX STREET, ALEXANDRIA, VA 22314

## 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, box 6 of 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, and highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations.

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 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) ANGELA WILLIAMS | 40.00 | | | | | | | | | |
| CHIEF EXECUTIVE OFFICER | 0.00 | | | X | | | | 853,994. | 0. | 55,486. |
| (2) BRUCE FRIEDMAN | 40.00 | | | | | | | | | |
| EVP, CHIEF FINANCIAL OFFICER | 0.00 | | | X | | | | 467,981. | 0. | 66,736. |
| (3) BYRON GARRETT (THRU 10/25) | 40.00 | | | | | | | | | |
| EVP, CHIEF REVENUE OFFICER | 0.00 | | | | X | | | 507,087. | 0. | 24,049. |
| (4) ODESSA JACKSON PETERSON | 40.00 | | | | | | | | | |
| EVP, GENERAL COUNSEL, CC & EO | 0.00 | | | X | | | | 477,650. | 0. | 18,849. |
| (5) JOHN FARDEN | 40.00 | | | | | | | | | |
| EVP, GLOBAL NTWK ADV & OPERATIONS | 0.00 | | | | X | | | 471,199. | 0. | 15,670. |
| (6) OMOIYE KINNEY | 40.00 | | | | | | | | | |
| EVP, MARKETING & COMMUNICATION | 0.00 | | | | X | | | 403,886. | 0. | 31,611. |
| (7) LADAWN NAEGLE | 40.00 | | | | | | | | | |
| EVP, CHIEF OF STAFF | 0.00 | | | | | X | | 375,715. | 0. | 44,293. |
| (8) SONYA ANDERSON | 40.00 | | | | | | | | | |
| EVP, INTERNATIONAL NETWORK | 0.00 | | | | X | | | 358,608. | 0. | 37,105. |
| (9) LAWANA JONES (THRU 10/25) | 40.00 | | | | | | | | | |
| SVP, CHIEF TECHNOLOGY OFF | 0.00 | | | | X | | | 360,746. | 0. | 33,927. |
| (10) THOMAS LOWERY | 40.00 | | | | | | | | | |
| SVP, NETWORK RESILIENCE | 0.00 | | | | | X | | 326,651. | 0. | 40,588. |
| (11) CHAD ROYAL-PASCOE | 40.00 | | | | | | | | | |
| SVP, GLOBAL RESOURCE DEVELOPMENT | 0.00 | | | | | X | | 288,330. | 0. | 52,978. |
| (12) ERIN BUDDE | 40.00 | | | | | | | | | |
| SVP, STRATEGIC INSIGHTS | 0.00 | | | | | X | | 282,623. | 0. | 56,202. |
| (13) DONNA STEWART | 40.00 | | | | | | | | | |
| EVP, CHIEF HUMAN RESOURCES OFFICER | 0.00 | | | | X | | | 317,110. | 0. | 17,745. |
| (14) KEBA MARSHALL | 40.00 | | | | | | | | | |
| SVP, CHIEF RISK OFFICER | 0.00 | | | | | X | | 283,836. | 0. | 25,315. |
| (15) YURI FULMER | 2.00 | | | | | | | | | |
| CHAIR | 0.00 | X | | X | | | | 0. | 0. | 0. |
| (16) MIKE HAYDE (THRU 07/25) | 2.00 | | | | | | | | | |
| TREAS/CHAIR OF FINANCE COMMITTEE | 0.00 | X | | X | | | | 0. | 0. | 0. |
| (17) MARK HOWARD (THRU 07/25) | 2.00 | | | | | | | | | |
| SECRETARY/CHAIR OF AUDIT COMMITTEE | 0.00 | X | | 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 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) JOHNNY TAYLOR JR. | 2.00 | | | | | | | | | |
| CHAIR OF EXEC COMP CMTE (THRU 10/25) | 0.00 | X | | | | | | 0. | 0. | 0. |
| (19) BILL O'DOWD | 2.00 | | | | | | | | | |
| CHAIR DEV & MKTG CMTE | 0.00 | X | | | | | | 0. | 0. | 0. |
| (20) JANICE BRYANT HOWROYD | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER (AS OF 07/25) | 0.00 | X | | | | | | 0. | 0. | 0. |
| (21) BRIAN PARSONS | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER (AS OF 07/25) | 0.00 | X | | | | | | 0. | 0. | 0. |
| (22) ROSIE ALLEN-HERRING | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (23) JULIANA AZEVEDO | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER (THRU 03/25) | 0.00 | X | | | | | | 0. | 0. | 0. |
| (24) ELAINE CHAO | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (25) MICHELLE DE LA ISLA | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (26) FRANCESCO VANNI D'ARCHRAFI | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| **1b Subtotal** | | | | | | | | 5,775,416. | 0. | 520,554. |
| **c Total from continuation sheets to Part VII, Section A** | | | | | | | | 0. | 0. | 0. |
| **d Total (add lines 1b and 1c)** | | | | | | | | 5,775,416. | 0. | 520,554. |

**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 133

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

**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 |
|---|---|---|
| FURTHER LLC, 180 ADMIRAL COCHRANE DRIVE, ANNAPOLIS, MD 21401 | COMMUNICATION AND PUBLIC RELATION SVCS. | 1,266,496. |
| MCKINSEY & COMPANY, 140 FOUNTAIN PARKWAY NORTH, ST. PETERSBURG, FL 33716 | STRATEGIC BUS. MGMT. CONSULTING SVCS. | 821,875. |
| SOCIAL CAPITAL PARTNERSHIPS, 980 NORTH MICHIGAN AVENUE, CHICAGO, IL 60611 | ADVISORY SERVICES | 765,370. |
| LAUREL STRATEGIES, INC. 4A OXFORD STREET, CHEVY CHASE, MD 20815 | GLOBAL BUS. ADVISORY & STRATEGIC COMM. | 650,000. |
| WEBER SHANDWICK 733 10TH STREET, NW, WASHINGTON, DC 20001 | COMMUNICATION AND PUBLIC RELATION SVCS. | 632,898. |

**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 35

SEE PART VII, SECTION A CONTINUATION SHEETS

**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 line) | (C) Position (check all that apply) | | | | | | (D) Reportable compensation from the organization (W-2/1099-MISC) | (E) Reportable compensation from related organizations (W-2/1099-MISC) | (F) Estimated amount of other compensation from the organization and related organizations |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Individual trustee or director | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | |
| (27) HELENE GLOTZER - (AS OF 07/25) | 2.00 | | | | | | | | | |
| SECRETARY/CHAIR OF AUDIT COMMITTEE | 0.00 | X | | X | | | | 0. | 0. | 0. |
| (28) CHRISTINA GUTIERREZ DE PINERES | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (29) BRIAN HULSEMAN-ABRAMS | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (30) DARIENNE DRIVER HUDSON | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (31) TOM MCINERNEY - (AS OF 07/25) | 2.00 | | | | | | | | | |
| TREAS/CHAIR OF FINANCE COMMITTEE | 0.00 | X | | X | | | | 0. | 0. | 0. |
| (32) SWATI MYLAVARAPU | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER (THRU 12/25) | 0.00 | X | | | | | | 0. | 0. | 0. |
| (33) STEVE ORTIZ | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (34) MICHELE PARMELEE | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (35) MELISSA POTTER | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (36) DAVID SHAFFER | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (37) TERI SMITH | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (38) GEETHA THARMARATNAM | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
| (39) LANHEE YUNG | 1.00 | | | | | | | | | |
| AT-LARGE BOARD MEMBER | 0.00 | X | | | | | | 0. | 0. | 0. |
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| Total to Part VII, Section A, line 1c | | | | | | | | | | |

## Part VIII Statement of Revenue

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

| | | | | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512 - 514 |
|---|---|---|---|---|---|---|---|
| Contributions, Gifts, Grants and Other Similar Amounts | 1a | Federated campaigns | 1a | | | | |
| | b | Membership dues | 1b | | | | |
| | c | Fundraising events | 1c | | | | |
| | d | Related organizations | 1d | | | | |
| | e | Government grants (contributions) | 1e | | | | |
| | f | All other contributions, gifts, grants, and similar amounts not included above | 1f | 41,781,786. | | | |
| | g | Noncash contributions included in lines 1a-1f | 1g | $ 2,206,087. | | | |
| | h | **Total.** Add lines 1a-1f | | 41,781,786. | | | |
| Program Service Revenue | | | Business Code | | | | |
| | 2a | MEMBERSHIP DUES | 900099 | 33,473,242. | 33,473,242. | | |
| | b | COURSE TUITION & CONFERENCES | 900099 | 1,242,315. | 1,242,315. | | |
| | c | SERVICE INCOME | 900099 | 364,833. | 364,833. | | |
| | d | PROMOTIONAL MATERIAL SALES | 900099 | 116,556. | 116,556. | | |
| | e | OTHER | 900099 | 21,057. | 21,057. | | |
| | f | All other program service revenue | | | | | |
| | g | **Total.** Add lines 2a-2f | | 35,218,003. | | | |
| Other Revenue | 3 | Investment income (including dividends, interest, and other similar amounts) | | 342,209. | | | 342,209. |
| | 4 | Income from investment of tax-exempt bond proceeds | | | | | |
| | 5 | Royalties | | 300,465. | | | 300,465. |
| | | | (i) Real | (ii) Personal | | | |
| | 6a | Gross rents 6a | 309,410. | | | | |
| | b | Less: rental expenses 6b | 0. | | | | |
| | c | Rental income or (loss) 6c | 309,410. | | | | |
| | d | Net rental income or (loss) | | 309,410. | | | 309,410. |
| | | | (i) Securities | (ii) Other | | | |
| | 7a | Gross amount from sales of assets other than inventory 7a | 2,249,533. | | | | |
| | b | Less: cost or other basis and sales expenses 7b | 2,206,087. | | | | |
| | c | Gain or (loss) 7c | 43,446. | | | | |
| | d | Net gain or (loss) | | 43,446. | | | 43,446. |
| | 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 | | | | | | |
| | b | | | | | | |
| | c | | | | | | |
| | d | All other revenue | | | | | |
| | e | **Total.** Add lines 11a-11d | | | | | |
| | 12 | **Total revenue.** See instructions | | 77,995,319. | 35,218,003. | 0. | 995,530. |

## 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 ..... X

| *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 | 21,048,926. | 21,048,926. | | |
| 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 | 11,254,225. | 11,254,225. | | |
| 4 Benefits paid to or for members | | | | |
| 5 Compensation of current officers, directors, trustees, and key employees | 4,519,066. | 2,958,108. | 797,205. | 763,753. |
| 6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | 1,560,288. | 137,982. | 891,171. | 531,135. |
| 7 Other salaries and wages | 23,641,848. | 16,480,011. | 3,425,643. | 3,736,194. |
| 8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | 1,129,904. | 686,919. | 255,504. | 187,481. |
| 9 Other employee benefits | 2,960,066. | 1,798,506. | 670,668. | 490,892. |
| 10 Payroll taxes | 1,782,295. | 1,083,537. | 403,028. | 295,730. |
| 11 Fees for services (nonemployees): | | | | |
| a Management | | | | |
| b Legal | 1,029,326. | 465,930. | 436,034. | 127,362. |
| c Accounting | 349,265. | 23,295. | 325,970. | |
| d Lobbying | | | | |
| e Professional fundraising services. See Part IV, line 17 | | | | |
| f Investment management fees | 44,472. | | 44,472. | |
| g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.) | 14,371,814. | 10,049,818. | 2,013,233. | 2,308,763. |
| 12 Advertising and promotion | 166,600. | 136,713. | 1,104. | 28,783. |
| 13 Office expenses | 889,327. | 281,851. | 43,741. | 563,735. |
| 14 Information technology | 292,232. | 180,371. | 95,005. | 16,856. |
| 15 Royalties | | | | |
| 16 Occupancy | 868,420. | 559,578. | 155,655. | 153,187. |
| 17 Travel | 1,383,718. | 992,781. | 143,285. | 247,652. |
| 18 Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 Conferences, conventions, and meetings | 1,922,737. | 1,856,132. | 45,726. | 20,879. |
| 20 Interest | 110,732. | | 110,732. | |
| 21 Payments to affiliates | | | | |
| 22 Depreciation, depletion, and amortization | 1,234,383. | 801,657. | 214,928. | 217,798. |
| 23 Insurance | 393,274. | 31,534. | 361,612. | 128. |
| 24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.) | | | | |
| a DUES AND SUBSCRIPTIONS | 2,210,993. | 1,493,121. | 412,718. | 305,154. |
| b BAD DEBT EXPENSE | 5,298. | 0. | 2,602. | 2,696. |
| c TAXES | 2,675. | 2,460. | 125. | 90. |
| d | | | | |
| e All other expenses | | | | |
| 25 **Total functional expenses.** Add lines 1 through 24e | 93,171,884. | 72,323,455. | 10,850,161. | 9,998,268. |
| 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 X ☐

| | | | (A) Beginning of year | | (B) End of year |
|---|---|---|---|---|---|
| Assets | 1 | Cash - non-interest-bearing | 10,825,845. | 1 | 4,301,856. |
| | 2 | Savings and temporary cash investments | 531,161. | 2 | 260,951. |
| | 3 | Pledges and grants receivable, net | 3,845,267. | 3 | 4,019,643. |
| | 4 | Accounts receivable, net | 2,388,936. | 4 | 2,434,318. |
| | 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 | 0. | 5 | 0. |
| | 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) | 0. | 6 | 0. |
| | 7 | Notes and loans receivable, net | 0. | 7 | 0. |
| | 8 | Inventories for sale or use | 0. | 8 | 0. |
| | 9 | Prepaid expenses and deferred charges | 572,481. | 9 | 502,063. |
| | 10a | Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D — 10a: 54,255,724. | | | |
| | b | Less: accumulated depreciation — 10b: 35,074,434. | 20,053,831. | 10c | 19,181,290. |
| | 11 | Investments - publicly traded securities | 13,574,446. | 11 | 10,093,963. |
| | 12 | Investments - other securities. See Part IV, line 11 | 5,387,758. | 12 | 0. |
| | 13 | Investments - program-related. See Part IV, line 11 | 0. | 13 | 0. |
| | 14 | Intangible assets | 159,107. | 14 | 135,536. |
| | 15 | Other assets. See Part IV, line 11 | 10,638,496. | 15 | 12,695,352. |
| | 16 | **Total assets.** Add lines 1 through 15 (must equal line 33) | 67,977,328. | 16 | 53,624,972. |
| Liabilities | 17 | Accounts payable and accrued expenses | 2,667,752. | 17 | 2,644,502. |
| | 18 | Grants payable | 0. | 18 | |
| | 19 | Deferred revenue | 4,836,509. | 19 | 4,924,494. |
| | 20 | Tax-exempt bond liabilities | 0. | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D | 8,756,720. | 21 | 10,586,525. |
| | 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 | 0. | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | 0. | 23 | 4,164,000. |
| | 24 | Unsecured notes and loans payable to unrelated third parties | 0. | 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 | 3,626,581. | 25 | 3,821,046. |
| | 26 | **Total liabilities.** Add lines 17 through 25 | 19,887,562. | 26 | 26,140,567. |
| 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 | 24,314,261. | 27 | 7,904,739. |
| | 28 | Net assets with donor restrictions | 23,775,505. | 28 | 19,579,666. |
| | | **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 | 48,089,766. | 32 | 27,484,405. |
| | 33 | Total liabilities and net assets/fund balances | 67,977,328. | 33 | 53,624,972. |

## Part XI Reconciliation of Net Assets

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

| | | | |
|---|---|---|---|
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | 77,995,319. |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 93,171,884. |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | -15,176,565. |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A)) | 4 | 48,089,766. |
| 5 | Net unrealized gains (losses) on investments | 5 | 296,507. |
| 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 on Schedule O) | 9 | -5,725,303. |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B)) | 10 | 27,484,405. |

## Part XII Financial Statements and Reporting

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

| | | | Yes | No |
|---|---|---|---|---|
| 1 | Accounting method used to prepare the Form 990: ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O. | | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | 2a | | X |
| | If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis | | | |
| b | Were the organization's financial statements audited by an independent accountant? | 2b | | X |
| | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis | | | |
| c | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? | 2c | | |
| | If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O. | | | |
| 3a | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? | 3a | | X |
| 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 on Schedule O and describe any steps taken to undergo such audits | 3b | | |

**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

**2025**

**Open to Public Inspection**

**Name of the organization**
UNITED WAY WORLDWIDE

**Employer identification number**
13-1635294

## 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 **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2)**. See **section 509(a)(3).** Check the box 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? Yes | (iv) No | (v) Amount of monetary support (see instructions) | (vi) Amount of other support (see instructions) |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| **Total** | | | | | | |

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

## Section A. Public Support

| Calendar year (or fiscal year beginning in) | (a) 2021 | (b) 2022 | (c) 2023 | (d) 2024 | (e) 2025 | (f) Total |
|---|---|---|---|---|---|---|
| 1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") | 68,676,336. | 54,355,890. | 21,525,082. | 41,046,025. | 41,781,786. | 227,385,119. |
| 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 | 68,676,336. | 54,355,890. | 21,525,082. | 41,046,025. | 41,781,786. | 227,385,119. |
| 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) | | | | | | 45,526,382. |
| 6 **Public support.** Subtract line 5 from line 4. | | | | | | 181,858,737. |

## Section B. Total Support

| Calendar year (or fiscal year beginning in) | (a) 2021 | (b) 2022 | (c) 2023 | (d) 2024 | (e) 2025 | (f) Total |
|---|---|---|---|---|---|---|
| 7 Amounts from line 4 | 68,676,336. | 54,355,890. | 21,525,082. | 41,046,025. | 41,781,786. | 227,385,119. |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources | 937,907. | 1,103,625. | 1,588,862. | 1,388,246. | 1,470,887. | 6,489,527. |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on | | | | | | |
| 10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) | | | | | | |
| 11 **Total support.** Add lines 7 through 10 | | | | | | 233,874,646. |

12 Gross receipts from related activities, etc. (see instructions) ..... 12 179,576,206.

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 2025 (line 6, column (f), divided by line 11, column (f)) ..... 14 77.76 %

15 Public support percentage from 2024 Schedule A, Part II, line 14 ..... 15 91.91 %

16a **33 1/3% support test - 2025.** 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 - 2024.** 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 - 2025.** 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 - 2024.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and **stop here.** Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... ☐

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

## Part III Support Schedule for Organizations Described in Section 509(a)(2)

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

### Section A. Public Support

| Calendar year (or fiscal year beginning in) | (a) 2021 | (b) 2022 | (c) 2023 | (d) 2024 | (e) 2025 | (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) 2021 | (b) 2022 | (c) 2023 | (d) 2024 | (e) 2025 | (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 2025 (line 8, column (f), divided by line 13, column (f)) | 15 | % |
| 16 Public support percentage from 2024 Schedule A, Part III, line 15 | 16 | % |

### Section D. Computation of Investment Income Percentage

| | | |
|---|---|---|
| 17 Investment income percentage for **2025** (line 10c, column (f), divided by line 13, column (f)) | 17 | % |
| 18 Investment income percentage from **2024** Schedule A, Part III, line 17 | 18 | % |

19a **33 1/3% support tests - 2025.** 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 - 2024.** 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, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, 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.* | 1 | | |
| 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).* | 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.* | 3a | | |
| 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.* | 3b | | |
| 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.* | 3c | | |
| 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.* | 4a | | |
| 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.* | 4b | | |
| 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.* | 4c | | |
| 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).* | 5a | | |
| 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? | 5b | | |
| c | **Substitutions only.** Was the substitution the result of an event beyond the organization's control? | 5c | | |
| 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.** | 6 | | |
| 7 | Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990).* | 7 | | |
| 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).* | 8 | | |
| 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.** | 9a | | |
| 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.** | 9b | | |
| 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.** | 9c | | |
| 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.* | 10a | | |
| 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.)* | 10b | | |

**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? | **11a** | | |
| **b** | A family member of a person described on line 11a above? | **11b** | | |
| **c** | A 35% controlled entity of a person described on line 11a or 11b above? *If "Yes" to line 11a, 11b, or 11c, provide detail in* **Part VI.** | **11c** | | |

## Section B. Type I Supporting Organizations

| | | | Yes | No |
|---|---|---|---|---|
| **1** | Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, 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 officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.* | **1** | | |
| **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.* | **2** | | |

## 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).* | **1** | | |

## 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? | **1** | | |
| **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).* | **2** | | |
| **3** | By reason of the relationship described on 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.* | **3** | | |

## 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 supported organization. *Describe in* **Part VI** *how you supported a governmental supported organization (see instructions).*

| | | | Yes | No |
|---|---|---|---|---|
| **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 its supported organization(s)? *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 each of its supported organizations, and how the organization determined that these activities constituted substantially all of its activities.* | **2a** | | |
| **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.* | **2b** | | |
| **3** | Parent of Supported Organizations. **Answer lines 3a, 3b, and 3c below.** | | | |
| **a** | Are the organization and its supported organization(s) part of an integrated system (for example, a hospital system)? *If "Yes," provide details in* **Part VI.** | **3a** | | |
| **b** | Did the organization direct 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.* | **3b** | | |
| **c** | Did the organization have the power to regularly appoint or elect (and remove) a majority of the officers, directors, or trustees of each of the supported organizations? *If "Yes" or "No," provide details in* **Part VI.** | **3c** | | |

## 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): | | | |
| **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 (*explain in detail in* **Part VI**): | | | |
| **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 0.85 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 (prior IRS approval required - *provide details in* **Part VI**) | **5** | |
| **6** **Total annual distributions.** Add lines 1 through 5. | **6** | |
| **7** Distributions to attentive supported organizations to which the organization is responsive (*provide details in* **Part VI**). See instructions. | **7** | |
| **8** Distributable amount for 2025 from Section C, line 6 | **8** | |
| **9** Line 7 amount divided by line 8 amount | **9** | |

| **Section E - Distribution Allocations** (see instructions) | **(i) Excess Distributions** | **(ii) Underdistributions Pre-2025** | **(iii) Distributable Amount for 2025** |
|---|---|---|---|
| **1** Distributable amount for 2025 from Section C, line 6 | | | |
| **2** Underdistributions, if any, for years prior to 2025 (reasonable cause required - *explain in* **Part VI**). See instructions. | | | |
| **3** Excess distributions carryover, if any, to 2025 | | | |
| **a** From 2020 | | | |
| **b** From 2021 | | | |
| **c** From 2022 | | | |
| **d** From 2023 | | | |
| **e** From 2024 | | | |
| **f** **Total** of lines 3a through 3e | | | |
| **g** Applied to under distributions of prior years | | | |
| **h** Applied to 2025 distributable amount | | | |
| **i** Carryover from 2020 not applied (see instructions) | | | |
| **j** Remainder. Subtract lines 3g, 3h, and 3i from line 3f. | | | |
| **4** Distributions for 2025 from Section D, line 6: $ | | | |
| **a** Applied to underdistributions of prior years | | | |
| **b** Applied to 2025 distributable amount | | | |
| **c** Remainder. Subtract lines 4a and 4b from line 4. | | | |
| **5** Remaining underdistributions for years prior to 2025, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, *explain in* **Part VI.** See instructions. | | | |
| **6** Remaining underdistributions for 2025. Subtract lines 3h and 4b from line 1. For result greater than zero, *explain in* **Part VI**. See instructions. | | | |
| **7** **Excess distributions carryover to 2026.** Add lines 3j and 4c. | | | |
| **8** Breakdown of line 7: | | | |
| **a** Excess from 2021 | | | |
| **b** Excess from 2022 | | | |
| **c** Excess from 2023 | | | |
| **d** Excess from 2024 | | | |
| **e** Excess from 2025 | | | |

**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, 3b, and 3c; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5 and 7; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions.)

**Schedule B (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Schedule of Contributors

**Attach to Form 990, 990-EZ, or 990-PF.**
**Go to www.irs.gov/Form990 for the latest information.**

OMB No. 1545-0047

| Name of the organization | Employer identification number |
|---|---|
| UNITED WAY WORLDWIDE | 13-1635294 |

**Organization type** (check one):

| Filers of: | Section: |
|---|---|
| Form 990 or 990-EZ | [X] 501(c)( 3 ) (enter number) organization |
| | [ ] 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation |
| | [ ] 527 political organization |
| Form 990-PF | [ ] 501(c)(3) exempt private foundation |
| | [ ] 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | [ ] 501(c)(3) taxable private foundation |

Check if your organization is covered by the **General Rule** or a **Special Rule.**
**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

[ ] For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

[X] For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

[ ] For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year ..... $ _____

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization: UNITED WAY WORLDWIDE

Employer identification number: 13-1635294

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|---|---|---|---|
| 1 | | $ 6,566,310. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 2 | | $ 4,755,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 3 | | $ 4,536,935. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 4 | | $ 2,500,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 5 | | $ 2,153,986. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 6 | | $ 2,029,778. | Person [X] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions.) |

Name of organization: UNITED WAY WORLDWIDE

Employer identification number: 13-1635294

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|---|---|---|---|
| 7 | | $ 2,000,442. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 8 | | $ 1,401,750. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 9 | | $ 1,250,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 10 | | $ 1,048,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 11 | | $ 1,045,969. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| 12 | | $ 1,000,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |

| Name of organization | Employer identification number |
|---|---|
| UNITED WAY WORLDWIDE | 13-1635294 |

**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|---|---|---|---|
| 13 | | $ 840,000. | Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |
| | | $ | Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.) |

Name of organization: UNITED WAY WORLDWIDE

Employer identification number: 13-1635294

**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
|---|---|---|---|
| 6 | STOCK | $ 2,012,248. | 12/31/25 |
| | | $ | |
| | | $ | |
| | | $ | |
| | | $ | |
| | | $ | |
| | | $ | |

Name of organization

UNITED WAY WORLDWIDE

Employer identification number

13-1635294

**Part III** **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e) and** the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this info. once.) $_____

Use duplicate copies of Part III if additional space is needed.

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---|---|---|
| | | | |

(e) Transfer of gift

| Transferee's name, address, and ZIP + 4 | Relationship of transferor to transferee |
|---|---|
| | |

**SCHEDULE C**
**(Form 990)**

Department of the Treasury
Internal Revenue Service

# Political Campaign and Lobbying Activities

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

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

OMB No. 1545-0047

**2025**

**Open to Public Inspection**

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

- Section 501(c)(3) organizations: Complete Parts I-A and I-B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and I-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 organization | Employer identification number (EIN) |
|---|---|
| UNITED WAY WORLDWIDE | 13-1635294 |

## 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.
2 Political campaign activity expenditures ..... $
3 Volunteer hours for political campaign activities .....

## 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 EINs 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-. |
|---|---|---|---|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

**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 (grassroots lobbying) | | 0. |
| **b** Total lobbying expenditures to influence a legislative body (direct lobbying) | | 0. |
| **c** Total lobbying expenditures (add lines 1a and 1b) | | |
| **d** Other exempt purpose expenditures | | 0. |
| **e** Total exempt purpose expenditures (add lines 1c and 1d) | | |
| **f** Lobbying nontaxable amount. Enter the amount from the following table in both columns. | | |
| **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- | | |

| **IF the amount on line 1e, column (a) or (b), is:** | **THEN 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. |

**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)** 2022 | **(b)** 2023 | **(c)** 2024 | **(d)** 2025 | **(e)** Total |
|---|---|---|---|---|---|
| **2a** Lobbying nontaxable amount | | | | | |
| **b** Lobbying ceiling amount (150% of line 2a, column(e)) | | | | | |
| **c** Total lobbying expenditures | | | | | |
| **d** Grassroots nontaxable amount | | | | | |
| **e** Grassroots ceiling amount (150% of line 2d, column (e)) | | | | | |
| **f** Grassroots lobbying expenditures | | | | | |

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

| *For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.* | (a) Yes | (a) No | (b) Amount |
|---|---|---|---|
| **1** During the year, did the filing organization attempt to influence foreign, national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of: | | | |
| **a** Volunteers? | | X | |
| **b** Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? | | X | |
| **c** Media advertisements? | | X | |
| **d** Mailings to members, legislators, or the public? | | X | |
| **e** Publications, or published or broadcast statements? | | X | |
| **f** Grants to other organizations for lobbying purposes? | | X | |
| **g** Direct contact with legislators, their staffs, government officials, or a legislative body? | X | | 9,150. |
| **h** Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? | | X | |
| **i** Other activities? | | X | |
| **j** Total. Add lines 1c through 1i | | | 9,150. |
| **2a** Did the activities in line 1 cause the organization to not be described in section 501(c)(3)? | | X | |
| **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 campaign activity 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 expenditures 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.

PART II-B, LINE 1, LOBBYING ACTIVITIES:

UNITED WAY WORLDWIDE ENGAGED IN A RANGE OF ACTIVITIES DESIGNED TO PROMOTE AWARENESS AND UNDERSTANDING OF HOW UNITED WAY AND OUR NETWORK MOBILIZES AROUND CHALLENGES AND EXPANDS OPPORTUNITIES FOR ALL. THE ACTIVITIES INCLUDED ENGAGING IN DISCUSSIONS AND MEETINGS WITH FEDERAL POLICYMAKERS TO SHARE OUR EXPERTISE AND ADVOCATE FOR POLICIES THAT MAKE LIFE BETTER FOR INDIVIDUALS AND FAMILIES THROUGHOUT THE UNITED STATES.

THE AMOUNT REPORTED AS LOBBYING EXPENDITURES ON SCHEDULE C, LINE 1G REPRESENTS ESTIMATED COSTS OF DIRECT CONTACT WITH GOVERNMENT OFFICIALS BY CERTAIN PUBLIC POLICY EMPLOYEES OF UWW. AS SUCH, THIS AMOUNT IS CATEGORIZED AS SALARIES AND WAGES ON PART IX, STATEMENT OF FUNCTIONAL

**Part IV** **Supplemental Information** *(continued)*

EXPENSES, AND NOT AS LOBBYING EXPENSES.

**SCHEDULE D** (Form 990) (Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Supplemental Financial Statements

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

OMB No. 1545-0047

**Open to Public Inspection**

**Name of the organization**
UNITED WAY WORLDWIDE

**Employer identification number**
13-1635294

## 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 | 24 | |
| 2 | Aggregate value of contributions to (during year) | 11,123,351. | |
| 3 | Aggregate value of grants from (during year) | 10,539,474. | |
| 4 | Aggregate value at end of year | 4,572,443. | |

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? [X] 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? [X] 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 (for example, recreation or education)
- [ ] Preservation of a historically important land area
- [ ] Protection of natural habitat
- [ ] Preservation of a certified historic structure
- [ ] Preservation of open space

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

| | | Held at the End of the 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 on line 2a | 2c |
| d | Number of conservation easements included on line 2c acquired after July 25, 2006, 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 2d 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 make 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 program
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 | 8,330,825. | 6,278,301. | 4,085,598. | 5,296,146. | 15,787,066. |
| b Contributions | 1,733,666. | 1,713,184. | 1,500,000. | 890,800. | 897,418. |
| c Net investment earnings, gains, and losses | 1,415,234. | 806,222. | 844,772. | -779,788. | 682,440. |
| d Grants or scholarships | 0. | 0. | 0. | 0. | 0. |
| e Other expenditures for facilities and programs | 532,715. | 466,882. | 152,069. | 152,069. | 12,070,778. |
| f Administrative expenses | 0. | 0. | 0. | 0. | 0. |
| g End of year balance | 10,947,010. | 8,330,825. | 6,278,301. | 5,255,089. | 5,296,146. |

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

a Board designated or quasi-endowment 52.5000 %
b Permanent endowment 47.5000 %
c Term endowment _____ %

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

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

| | | Yes | No |
|---|---|---|---|
| (i) Unrelated organizations? | 3a(i) | | X |
| (ii) Related organizations? | 3a(ii) | | X |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? | 3b | | |

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

## Part VI Land, Buildings, and Equipment

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

| Description of property | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|---|---|---|---|---|
| 1a Land | | 2,102,080. | | 2,102,080. |
| b Buildings | | 42,017,248. | 25,548,766. | 16,468,482. |
| c Leasehold improvements | | | | |
| d Equipment | | 8,399,885. | 8,195,374. | 204,511. |
| e Other | | 1,736,511. | 1,330,294. | 406,217. |
| **Total.** Add lines 1a through 1e. *(Column (d) must equal Form 990, Part X, line 10c, column (B))* | | | | 19,181,290. |

## 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. (Col. (b) must equal Form 990, Part X, line 12, col. (B)) | | |

## 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. (Col. (b) must equal Form 990, Part X, line 13, col. (B)) | | |

## 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) | CUSTODIAL FUNDS (EFSP, YOURCAUSE, FRONTSTREAM) | 10,188,930. |
| (2) | OTHER ASSETS | 1,101,779. |
| (3) | CASH VALUE OF LIFE INSURANCE | 655,855. |
| (4) | CHARITABLE GIFT ANNUITY | 397,595. |
| (5) | DEFERRED COMPENSATION CUSTODIAL ASSETS | 351,193. |
| (6) | | |
| (7) | | |
| (8) | | |
| (9) | | |
| Total. *(Column (b) must equal Form 990, Part X, line 15, col. (B))* | | 12,695,352. |

## Part X Other Liabilities

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

| 1. | (a) Description of liability | (b) Book value |
|---|---|---|
| (1) | Federal income taxes | |
| (2) | ACCRUED PENSION | 2,975,495. |
| (3) | POST RETIREMENT BENEFITS | 681,011. |
| (4) | OTHER LIABILITIES | 164,540. |
| (5) | | |
| (6) | | |
| (7) | | |
| (8) | | |
| (9) | | |
| Total. *(Column (b) must equal Form 990, Part X, line 25, col. (B))* | | 3,821,046. |

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

## 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 | |
| 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 | |
| 3 | Subtract line 2e from line 1 | | | 3 | |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1: | | | | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b | Other (Describe in Part XIII.) | 4b | | | |
| c | Add lines 4a and 4b | | | 4c | |
| 5 | Total expenses. Add lines **3** and **4c.** *(This must equal Form 990, Part I, line 18.)* | | | 5 | |

## 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.

PART IV, LINE 2B:

EXPLANATION OF ESCROW AGREEMENT

IN 1983, A NATIONAL BOARD WAS CONVENED TO OVERSEE DISTRIBUTION OF FUNDS THROUGH THE EMERGENCY FOOD AND SHELTER PROGRAM (EFSP), A SEPARATE CONGRESSIONALLY AUTHORIZED PROGRAM OF THE FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA) WITHIN THE DEPARTMENT OF HOMELAND SECURITY (INDEPENDENT AGENCY PRIOR TO 2002). EACH YEAR, UWW HAS BEEN ELECTED BY THE EFSP NATIONAL BOARD TO SERVE AS ITS FISCAL AGENT. AS FISCAL AGENT, UWW IS THE INTERMEDIARY CUSTODIAN OF THE FUNDS AND IS RESPONSIBLE FOR THE DISBURSEMENT OF GRANTS AS DIRECTED BY THE NATIONAL BOARD. EFSP IS NOT CONSOLIDATED INTO THE ORGANIZATION'S FINANCIAL STATEMENTS. SINCE 1983, U.S. CONGRESS HAS ALLOCATED MORE THAN $6.7 BILLION TO THE FEMA TO PROVIDE EMERGENCY FOOD AND SHELTER TO NEEDY INDIVIDUALS THROUGHOUT THE COUNTRY. AS OF DECEMBER 31, 2025, UNDISTRIBUTED BALANCES OF $10,188,795 WERE INCLUDED IN THE CUSTODIAL FUNDS WITH A CORRESPONDING LIABILITY IN THE CONSOLIDATED STATEMENTS OF FINANCIAL POSITION OF UWW.

IN ADDITION, UWW ACTS AS THE TRUSTEE FOR A PLANNED GIVING INVESTMENT PROGRAM CALLED THE CHARITABLE GIFT ANNUITY PROGRAM (CGA), WHERE ANNUITY PAYMETS ARE MADE TO THE NAMED ANNUITANT(S) FOR LIFT AND ANY RESIDUAL VALUE IS RESTRICTED BY BY THE DONOR TO BENEFIT A MEMBER UNITED WAY. THE CGA IS CURRENTLY HELD FOR RESIDENTS OF CALIFORNIA, CONNECTICUT, FLORIDA, MASSACHUSETTS, MARYLAND, MISSOURI, NEW YORK, NORTH CAROLINA, NEW MEXICO, OHIO, PENNSYLVANIA, SOUTH CAROLINA, TEXAS, VIRGINIA, AND WISCONSIN. AS OF DECEMBER 31, 2025 AND 2024, THE FAIR VALUE OF THE CGA POOL WAS $397 AND

**Part XIII Supplemental Information** *(continued)*

$392, RESPECTIVELY.

UWW ALSO MAINTAINS TWO FISCAL AGENT AGREEMENTS WITH THIRD PARTIES ON BEHALF OF ITS MEMBERS TO PROVIDE DONATION PROCESSING SERVICES RELATED TO CERTAIN EMPLOYEE GIVING CAMPAIGNS. THESE CAMPAIGNS ARE CONSIDERED "FUNDRAISING ACTIVITY" OF UWW'S MEMBERS, AND UWW DOES NOT RECORD REVENUES FROM THESE TRANSACTIONS. UWW DOES RECORD COLLECTED FUNDS, NOT YET DISTRIBUTED BY THE THIRD-PARTY PROCESSORS, AS A CUSTODIAL ASSET AND CUSTODIAL LIABILITY. AS OF DECEMBER 31, 2025, THE FUND'S FAIR VALUE WAS $0

PART V, LINE 4:
INTENDED USES OF ENDOWMENT FUNDS
BOARD DESIGNATED QUASI-ENDOWMENT - UWW'S BOARD HAS DESIGNATED FUNDS BE SET ASIDE TO ESTABLISH AND MAINTAIN A QUASI-ENDOWMENT FOR THE PURPOSE OF SECURING THE ORGANIZATION'S LONG-TERM FINANCIAL VIABILITY AND CONTINUING TO MEET THE NEEDS OF THE ORGANIZATION.

DONOR RESTRICTED PERMANENT ENDOWMENT - THE ORGANIZATION'S DONOR RESTRICTED ENDOWMENT CONSISTS OF TWO FUNDS, ONE ESTABLISHED FOR THE PURPOSE OF PROVIDING HOME CARE AND ASSISTED LIVING TO THE ELDERLY POOR, WITH SPECIFIC REFERENCE TO ASSISTING OLDER PEOPLE TO REMAIN IN THEIR OWN HOMES, AND THE OTHER ESTABLISHED FOR THE PURPOSE OF PROVIDING GENERAL OPERATIONAL SUPPORT FOR THE ORGANIZATION.

**SCHEDULE F (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Statement of Activities Outside the United States

**Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.**
**Attach to Form 990.**
**Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization

UNITED WAY WORLDWIDE

**Employer identification number**

13-1635294

## Part I General Information on Activities Outside the United States.

Complete if the organization answered "Yes" on Form 990, Part IV, line 14b.

**1** **For grantmakers.** Does the organization maintain records to substantiate the amount of its grants and other assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ..... [X] **Yes** [ ] **No**

**2** **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States.

**3** Activities per Region. (The following Part I, line 3 table can be duplicated if additional space is needed.)

| **(a)** Region | **(b)** Number of offices in the region | **(c)** Number of employees, agents, and independent contractors in the region | **(d)** Activities conducted in the region (by type) (such as, fundraising, program services, investments, grants to recipients located in the region) | **(e)** If activity listed in (d) is a program service, describe specific type of service(s) in the region | **(f)** Total expenditures for and investments in the region |
|---|---|---|---|---|---|
| CENTRAL AMERICA AND THE CARIBBEAN - ANTIGUA & BARBUDA, ARUBA, BAHAMAS, | 0 | 0 | GRANTMAKING | | 85,050. |
| CENTRAL AMERICA AND THE CARIBBEAN - ANTIGUA & BARBUDA, ARUBA, BAHAMAS, | 0 | 0 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 287,587. |
| EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA, CAMBODIA, | 1 | 1 | GRANTMAKING | | 5,859,882. |
| EAST ASIA AND THE PACIFIC - AUSTRALIA, BRUNEI, BURMA, CAMBODIA, | 1 | 1 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 1,370,895. |
| EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA, AUSTRIA, BELGIUM | 1 | 4 | GRANTMAKING | | 3,516,307. |
| EUROPE (INCLUDING ICELAND & GREENLAND) - ALBANIA, ANDORRA, AUSTRIA, BELGIUM | 1 | 4 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 861,915. |
| MIDDLE EAST AND NORTH AFRICA - ALGERIA, BAHRAIN, DJIBOUTI, EGYPT, | 0 | 0 | GRANTMAKING | | 389,105. |
| MIDDLE EAST AND NORTH AFRICA - ALGERIA, BAHRAIN, DJIBOUTI, EGYPT, | 0 | 0 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 157,356. |
| **3 a** Subtotal ..... | 2 | 5 | | | 12,528,097. |
| **b** Total from continuation sheets to Part I ..... | 0 | 5 | | | 9,245,626. |
| **c** **Totals** (add lines 3a and 3b) ..... | 2 | 10 | | | 21,773,723. |

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** **Schedule F (Form 990) (Rev. 12-2024)**

LHA 532071 04-01-25

**Part I Continuation of Activities per Region.** (Schedule F (Form 990), Part I, line 3)

| (a) Region | (b) Number of offices in the region | (c) Number of employees or agents in region | (d) Activities conducted in region (by type) (i.e., fundraising, program services, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region |
|---|---|---|---|---|---|
| NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES | 0 | 0 | GRANTMAKING | | 1,729,326. |
| NORTH AMERICA - CANADA AND MEXICO, BUT NOT THE UNITED STATES | 0 | 0 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 232,729. |
| SOUTH AMERICA - ARGENTINA, BOLIVIA, BRAZIL, CHILE, COLOMBIA, ECUADOR, | 0 | 3 | GRANTMAKING | | 804,815. |
| SOUTH AMERICA - ARGENTINA, BOLIVIA, BRAZIL, CHILE, COLOMBIA, ECUADOR, | 0 | 3 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 421,769. |
| SOUTH ASIA - AFGHANISTAN, BANGLADESH, BHUTAN, INDIA, MALDIVES, | 0 | 1 | GRANTMAKING | | 437,831. |
| SOUTH ASIA - AFGHANISTAN, BANGLADESH, BHUTAN, INDIA, MALDIVES, | 0 | 1 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 58,922. |
| SUB-SAHARAN AFRICA - ANGOLA, BENIN, BOTSWANA, BURKINA FASO, | 0 | 1 | GRANTMAKING | | 152,018. |
| SUB-SAHARAN AFRICA - ANGOLA, BENIN, BOTSWANA, BURKINA FASO, | 0 | 1 | PROGRAM SERVICES | MEMBERSHIP SUPPORT | 20,458. |
| SUB-SAHARAN AFRICA - ANGOLA, BENIN, BOTSWANA, BURKINA FASO, | 0 | 1 | INVESTMENT | | 5,387,758. |
| | | | | | |
| **Totals** ▶ | | 5 | | | 9,245,626. |

**Part II** **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of noncash assistance | (h) Description of noncash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 30,279. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 168,525. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 50,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 32,433. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 32,433. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 28,500. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | HEALTH | 15,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | COMMUNITY DEVELOPMENT | 10,000. | BANK WIRE | 0. | | |

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as a tax exempt 501(c)(3) organization by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ..... 207

3 Enter total number of other organizations or entities ..... 0

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | SOUTH AMERICA | HEALTH | 10,000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 7,500. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 6,380. | BANK WIRE | 0. | | |
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 44,945. | BANK WIRE | 0. | | |
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 7,214. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | HUMANITARIAN RELIEF | 178,668. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 93,912. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 47,500. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | COMMUNITY DEVELOPMENT | 31,132. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 25,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY DEVELOPMENT | 18,704. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 60,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 30,334. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 30,286. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | COMMUNITY DEVELOPMENT | 30,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 15,142. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | HEALTH | 13,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 10,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 8,071. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 7,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 6,900. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | DISASTER RELIEF & RECOVERY | 25,201. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | ARTS & HUMANITIES | 23,803. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 15,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | HEALTH | 13,869. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 10,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY DEVELOPMENT | 300,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 100,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 90,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 33,019. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | ENVIRONMENTAL SUSTAINABILITY | 14,019. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 11,340. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 62,500. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 60,357. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 188,935. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 47,619. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 10,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 855,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 475,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 85,500. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 85,500. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | HEALTH | 30,286. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | HEALTH | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 7,500. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | NORTH AMERICA | EDUCATION | 7,500. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | HUMAN & SOCIAL SERVICES | 72,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 66,500. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | GENERAL CHARITABLE OPERATIONS | 47,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 2000000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 76,702. | BANK WIRE | 0. | | |
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 50,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 40,664. | BANK WIRE | 0. | | |
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 285,975. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 272,832. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 50,000. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | HUMANITARIAN RELIEF | 47,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 50,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | HEALTH | 7,547. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 25,000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 33,333. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 15,323. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 10,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 5,040. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | GENERAL CHARITABLE OPERATIONS | 100,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | GENERAL CHARITABLE OPERATIONS | 100,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 63,602. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | COMMUNITY DEVELOPMENT | 59,691. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | GENERAL CHARITABLE OPERATIONS | 100,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 50,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 10,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 10,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 88,000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 45,410. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 15,000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | GENERAL CHARITABLE OPERATIONS | 8,056. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 7,483. | BANK WIRE | 0. | | |
| | | SOUTH ASIA | ENVIRONMENTAL SUSTAINABILITY | 19,417. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 20,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 10,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | MIDDLE EAST AND NORTH AFRICA | COMMUNITY ENGAGEMENT | 7,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 18,868. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 17,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 14,701. | BANK WIRE | 0. | | |
| | | CENTRAL AMERICA AND THE CARIBBEAN | COMMUNITY ENGAGEMENT | 10,150. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | COMMUNITY ENGAGEMENT | 9,400. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 7,500. | BANK WIRE | 0. | | |
| | | CENTRAL AMERICA AND THE CARIBBEAN | COMMUNITY DEVELOPMENT | 22,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 16,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | SOUTH AMERICA | COMMUNITY DEVELOPMENT | 11,500. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | COMMUNITY DEVELOPMENT | 8,500. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | COMMUNITY DEVELOPMENT | 8,500. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 39,286. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 35,714. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY DEVELOPMENT | 34,243. | BANK WIRE | 0. | | |
| | | CENTRAL AMERICA AND THE CARIBBEAN | COMMUNITY DEVELOPMENT | 28,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | GENERAL CHARITABLE OPERATIONS | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 15,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | SOUTH AMERICA | EDUCATION | 94,336. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 55,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 40,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 20,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 20,000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 15,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 14,151. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 14,151. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 19,550. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | MIDDLE EAST AND NORTH AFRICA | HUMANITARIAN RELIEF | 18,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 17,210. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 14,897. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 12,121. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 9,171. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 181,185. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 134,014. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 91,611. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 55,243. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 48,971. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 48,471. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 40,723. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 37,669. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 33,419. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 30,542. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 30,107. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 29,969. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 29,969. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 29,969. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 29,969. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 28,469. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 24,969. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 14,720. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 9,113. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 17,346. | BANK WIRE | 0. | | |
| | | CENTRAL AMERICA AND THE CARIBBEAN | ENVIRONMENTAL SUSTAINABILITY | 14,750. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 14,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | CENTRAL AMERICA AND THE CARIBBEAN | EDUCATION | 10,150. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 10,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | HEALTH | 10,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 8,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | HEALTH | 2000000. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 8,810. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | GENERAL CHARITABLE OPERATIONS | 83,433. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 19,320. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | ENVIRONMENTAL SUSTAINABILITY | 60,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | HEALTH | 40,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | HEALTH | 20,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 20,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 18,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | HEALTH | 10,280. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | HEALTH | 10,150. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | GENERAL CHARITABLE OPERATIONS | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY ENGAGEMENT | 10,000. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | GENERAL CHARITABLE OPERATIONS | 7,236. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | NORTH AMERICA | DISASTER RELIEF & RECOVERY | 135,263. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 181,232. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 24,673. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 20,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | ENVIRONMENTAL SUSTAINABILITY | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | COMMUNITY ENGAGEMENT | 26,915. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | ENVIRONMENTAL SUSTAINABILITY | 345,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 20,500. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 168,525. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 48,825. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 35,333. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | HEALTH | 15,000. | BANK WIRE | 0. | | |
| | | MIDDLE EAST AND NORTH AFRICA | HUMAN & SOCIAL SERVICES | 18,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | GENERAL CHARITABLE OPERATIONS | 10,000. | BANK WIRE | 0. | | |
| | | NORTH AMERICA | EDUCATION | 50,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 25,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 22,500. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 20,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 19,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 10,000. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY ENGAGEMENT | 10,000. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 7,600. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 21,495. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | EDUCATION | 18,588. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | EDUCATION | 16,509. | BANK WIRE | 0. | | |
| | | SUB-SAHARAN AFRICA | COMMUNITY ENGAGEMENT | 15,321. | BANK WIRE | 0. | | |
| | | EAST ASIA AND THE PACIFIC | EDUCATION | 14,000. | BANK WIRE | 0. | | |

**Part II** **Continuation of Grants and Other Assistance to Organizations or Entities Outside the United States.** (Schedule F (Form 990), Part II, line 1)

| 1 **(a)** Name of organization | **(b)** IRS code section and EIN (if applicable) | **(c)** Region | **(d)** Purpose of grant | **(e)** Amount of cash grant | **(f)** Manner of cash disbursement | **(g)** Amount of non-cash assistance | **(h)** Description of non-cash assistance | **(i)** Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|---|
| | | EAST ASIA AND THE PACIFIC | ENVIRONMENTAL SUSTAINABILITY | 11,000. | BANK WIRE | 0. | | |
| | | SOUTH AMERICA | EDUCATION | 10,150. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY DEVELOPMENT | 36,500. | BANK WIRE | 0. | | |
| | | EUROPE (INCLUDING ICELAND & GREENLAND) | COMMUNITY DEVELOPMENT | 30,000. | BANK WIRE | 0. | | |
| | | | | | | | | |
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**Part III** **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" on Form 990, Part IV, line 16.
Part III can be duplicated if additional space is needed.

| **(a)** Type of grant or assistance | **(b)** Region | **(c)** Number of recipients | **(d)** Amount of cash grant | **(e)** Manner of cash disbursement | **(f)** Amount of noncash assistance | **(g)** Description of noncash assistance | **(h)** Method of valuation (book, FMV, appraisal, other) |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
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## Part IV Foreign Forms

| | | | |
|---|---|---|---|
| 1 | Was the organization a U.S. transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see the Instructions for Form 926)* | [X] Yes | [ ] No |
| 2 | Did the organization have an interest in a foreign trust during the tax year? *If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U.S. Owner (see the Instructions for Forms 3520 and 3520-A; don't file with Form 990)* | [ ] Yes | [X] No |
| 3 | Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect to Certain Foreign Corporations (see the Instructions for Form 5471)* | [X] Yes | [ ] No |
| 4 | Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see the Instructions for Form 8621)* | [ ] Yes | [X] No |
| 5 | Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see the Instructions for Form 8865)* | [X] Yes | [ ] No |
| 6 | Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see the Instructions for Form 5713; don't file with Form 990)* | [ ] Yes | [X] No |

**Part V Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

PART I, LINE 2:
PROCEDURES FOR MONITORING USE OF GRANT FUNDS
GRANTEES ARE REQUIRED TO SUBMIT A NARRATIVE PROPOSAL AND BUDGET ABOUT THE PROJECT FOR WHICH FUNDING IS BEING REQUESTED IN ORDER TO BE CONSIDERED FOR FUNDING. WHEN FUNDS ARE AWARDED, THE GRANTEE IS REQUIRED TO SIGN A BINDING CONTRACT WHICH ESTABLISHES THE PURPOSE OF THE FUNDING AND, WHEN APPLICABLE, REQUIRES THE SUBMISSION OF AN INTERIM AND FINAL FINANCIAL REPORT, ALONG WITH THE NARRATIVE REPORTS, DETAILING THE ACTUAL EXPENSES AND DESCRIBING THE ACTUAL USAGE OF THE AWARDED FUNDS. THE FINANCIAL REPORTS MUST BE SIGNED BY THE AUTHORIZED PERSONNEL OF THE GRANTEE ORGANIZATION. THESE REPORTS ARE THEN REVIEWED BY THE UNITED WAY WORLDWIDE MANAGER OVERSEEING THE PROJECT(S), AND THEN COMPARED TO THE ORIGINAL PROPOSAL SUBMITTED WHEN FUNDING IS REQUESTED.

PART I, LINE 3:
INVESTMENT IN EAST ASIA AND THE PACIFIC
UNITED WAY WORLDWIDE HAS A 100% INVESTMENT IN UNITED WAY WORLDWIDE (ASIA) LIMITED, A TAX-EXEMPT ENTITY IN HONG KONG. SEE SCHEDULE R, PART II. AS A WHOLLY OWNED SUBSIDIARY, INVESTMENT IN UNITED WAY (ASIA) LIMITED IS CARRIED AT A VALUE OF $0.00 AND ITS EXPENSES REPORTED AS FOREIGN GRANT EXPENSE ON SCHEDULE F.

PARTS I AND II:
METHOD TO ACCOUNT FOR EXPENDITURES: ACCRUAL

**SCHEDULE I (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# 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 instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization
UNITED WAY WORLDWIDE

**Employer identification number**
13-1635294

**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? ..... [X] 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.

| 1 (a) Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| UNITED WAY OF GREATER LOS ANGELES<br>1150 S. OLIVE ST., SUITE T500<br>LOS ANGELES, CA 90015 | 95-2274801 | 501(C)(3) | 1,405,302. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF GREATER ATLANTA<br>40 COURTLAND ST NE, STE 300<br>ATLANTA, GA 30303 | 58-0566194 | 501(C)(3) | 831,460. | 0. | | | HUMAN & SOCIAL SERVICES, EDUCATION, HEALTH, COMMUNITY ENGAGEMENT, COMMUNITY DEVELOPMENT |
| UNITED WAY BAY AREA<br>550 KEARNEY STREET, SUITE 510<br>SAN FRANCISCO, CA 94108 | 94-1312348 | 501(C)(3) | 600,090. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY, COMMUNITY DEVELOPMENT |
| UNITED WAY SUNCOAST (FL)<br>5201 W. KENNEDY BOULEVARD, SUITE 60<br>TAMPA, FL 33609 | 59-3725701 | 501(C)(3) | 564,640. | 0. | | | COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| INFORMATION & REFERRAL FEDERATION OF LOS ANGELES COUNTY - 790 E. COLORADO BLVD, SUITE 260 - PASADENA, CA 91101 | 95-3510017 | 501(C)(3) | 530,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY FOR SOUTHEASTERN MICHIGAN - 3011 W GRAND BLVD STE 500 - DETROIT, MI 48202 | 20-3099071 | 501(C)(3) | 500,066. | 0. | | | DISASTER RELIEF & RECOVERY, HUMAN & SOCIAL SERVICES |

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ..... 213.

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

**For Paperwork Reduction Act Notice, see the Instructions for Form 990.** **Schedule I (Form 990) (Rev. 12-2024)**

SEE PART IV FOR COLUMN (H) DESCRIPTIONS

LHA 532101 04-01-25

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| UNITED WAY OF FLORIDA<br>PO BOX 1007<br>TALLAHASSEE, FL 32805 | 59-2104175 | 501(C)(3) | 460,000. | 0. | | | COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF MIAMI<br>ANSIN BLDG, 3250 SW THIRD AVENUE<br>MIAMI, FL 33129 | 59-0830840 | 501(C)(3) | 436,600. | 0. | | | DISASTER RELIEF & RECOVERY, EDUCATION, COMMUNITY ENGAGEMENT |
| UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NEW JERSEY - 1800 JOHN F KENNEDY BLVD STE 1200 - PHILADELPHIA, PA 19100 | 23-1556045 | 501(C)(3) | 370,500. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, COMMUNITY |
| UNITED WAY OF GREATER HOUSTON<br>50 WAUGH DRIVE<br>HOUSTON, TX 77007 | 74-1167964 | 501(C)(3) | 362,095. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, HEALTH, |
| UNITED WAY OF NEW YORK CITY<br>205 E 42ND STREET, 12TH FLOOR<br>NEW YORK, NY 10017 | 13-2617681 | 501(C)(3) | 347,731. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, COMMUNITY |
| UNITED WAY OF SOUTHEAST LOUISIANA<br>215 CANAL STREET<br>NEW ORLEANS, LA 70119 | 72-0471369 | 501(C)(3) | 333,773. | 0. | | | COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, EDUCATION |
| VALLEY OF THE SUN UNITED WAY<br>1515 EAST OSBORN ROAD<br>PHOENIX, AZ 85014 | 86-0104419 | 501(C)(3) | 323,318. | 0. | | | COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF METROPOLITAN DALLAS, INC - 1800 N. LAMAR STREET - DALLAS, TX 75202 | 75-6005352 | 501(C)(3) | 308,000. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT, COMMUNITY DEVELOPMENT, EDUCATION |
| UNITED WAY OF THE NATIONAL CAPITAL AREA - 1015 15TH ST NW, STE1200 - WASHINGTON, DC 20005 | 53-0234290 | 501(C)(3) | 301,250. | 0. | | | COMMUNITY ENGAGEMENT, COMMUNITY DEVELOPMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

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|---|---|---|---|---|---|---|---|
| INLAND SOUTHERN CALIFORNIA UNITED WAY - 9624 HERMOSA AVENUE - RANCHO CUCAMONGA, CA 91730 | 95-1742174 | 501(C)(3) | 284,820. | 0. | | | COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SOUTHERN NEVADA 5830 W. FLAMINGO ROAD LAS VEGAS, NV 89103 | 88-0071328 | 501(C)(3) | 283,539. | 0. | | | COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SOUTHWEST ALABAMA INC - 218 ST. FRANCIS STREET - MOBILE, AL 36602 | 63-0351568 | 501(C)(3) | 276,080. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF THE CENTRAL SAVANNAH RIVER AREA CSRA (GA) - 1765 BROAD STREET - AUGUSTA, GA 30904 | 58-0566155 | 501(C)(3) | 272,381. | 0. | | | HUMAN & SOCIAL SERVICES, DISASTER RELIEF & RECOVERY, HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF MASSACHUSETTS BAY AND MERRIMACK VALLEY - PO BOX 412866 - BOSTON, MA 02241 | 04-2382233 | 501(C)(3) | 264,328. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF METROPOLITAN CHICAGO 222 MERCHANDISE MART PLAZA, STE 633, 30TH FLOOR - CHICAGO, IL 60654 | 30-0200478 | 501(C)(3) | 262,000. | 0. | | | COMMUNITY DEVELOPMENT, EDUCATION, COMMUNITY ENGAGEMENT |
| UNITED WAY OF LEE, HENDRY, AND GLADES COUNTIES (FL) - 7273 CONCOURSE DR - FORT MYERS, FL 33908 | 59-1005169 | 501(C)(3) | 251,640. | 0. | | | COMMUNITY DEVELOPMENT, HEALTH, COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SAN DIEGO COUNTY 4699 MURPHY CANYON ROAD SAN DIEGO, CA 92123 | 95-2213995 | 501(C)(3) | 250,000. | 0. | | | COMMUNITY DEVELOPMENT |
| DEBBIE ALLEN DANCE INC 1850 S MANHATTAN PLACE LOS ANGELES, CA 90019 | 95-4831387 | 501(C)(3) | 250,000. | 0. | | | DISASTER RELIEF & RECOVERY |

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF TUCSON AND SOUTHERN ARIZONA - PO BOX 86750 - TUCSON, AZ 85754 | 86-0098932 | 501(C)(3) | 200,800. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF THE MIDLANDS (NE) 1229 MILLWORK AVENUE OMAHA, NE 68102 | 47-0376605 | 501(C)(3) | 166,800. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF FORSYTH COUNTY, INC. (NC) - 301 N MAIN ST, SUITE 1700 - WINSTON-SALEM, NC 27101 | 23-7357234 | 501(C)(3) | 160,912. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| GREATER VALDOSTA UNITED WAY, INC. 1609 N. PATTERSON STREET VALDOSTA, GA 31602 | 58-0643332 | 501(C)(3) | 148,233. | 0. | | | DISASTER RELIEF & RECOVERY |
| SOLARI, INC. 1275 W. WASHINGTON ST., SUITE 210 TEMPE, AZ 85288 | 26-0446321 | 501(C)(3) | 142,040. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF GREATER TOLEDO 1001 MADISON AVE. STE.100 TOLEDO, OH 43604 | 34-4427947 | 501(C)(3) | 140,560. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF THE BIG BEND, INC. (FL) - 307 E 7TH AVE - TALLAHASSEE, FL 32303 | 59-6011150 | 501(C)(3) | 134,312. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| HEART OF WEST MICHIGAN UNITED WAY UW CENTER, 118 COMMERCE AVENUE S.W., SUITE 100 - GRAND RAPIDS, MI 49503 | 38-1360923 | 501(C)(3) | 131,750. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT |
| UNITED WAY OF THE PIEDMONT (SC) PO BOX 5624 SPARTANBURG, SC 29304 | 57-0314377 | 501(C)(3) | 127,297. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF NORTH CENTRAL FLORIDA - 6031 NW 1ST PL - GAINESVILLE, FL 32607 | 59-0808855 | 501(C)(3) | 121,508. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SOUTH SARASOTA COUNTY, INC. (FL) - 4242 SOUTH TAMIAMI TRAIL - VENICE, FL 34293 | 59-1100846 | 501(C)(3) | 120,604. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF PASCO COUNTY (FL) 17230 CAMELOT COURT L AND O LAKES, FL 34638 | 59-2193178 | 501(C)(3) | 117,418. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREATER CHARLOTTE 601 EAST 5TH ST STE 350 CHARLOTTE, NC 28202 | 56-0529948 | 501(C)(3) | 115,676. | 0. | | | COMMUNITY ENGAGEMENT, EDUCATION |
| UNITED WAY OF ASHEVILLE AND BUNCOMBE COUNTY - 50 S. FRENCH BROAD AVENUE - ASHEVILLE, NC 28801 | 56-0576157 | 501(C)(3) | 112,712. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREENE COUNTY, INC. (TN) - 115 ACADEMY STREET - GREENEVILLE, TN 37743 | 62-6015767 | 501(C)(3) | 111,834. | 0. | | | DISASTER RELIEF & RECOVERY |
| HEART OF FLORIDA UNITED WAY 1940 CANNERY WAY ORLANDO, FL 32804 | 59-0808854 | 501(C)(3) | 110,000. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| HIGH COUNTRY UNITED WAY PO BOX 247 BOONE, NC 28607 | 56-1218079 | 501(C)(3) | 107,717. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE MIDLANDS SC 1818 BLANDING ST COLUMBIA, SC 29201 | 57-0314396 | 501(C)(3) | 106,088. | 0. | | | COMMUNITY ENGAGEMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF COLLIER AND KEYS<br>9015 STRADA STELL COURT, SUITE 204<br>NAPLES, FL 34109 | 59-1026096 | 501(C)(3) | 103,500. | 0. | | | COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF NORTHWEST FLORIDA<br>602 HARRISON AVENUE<br>PANAMA CITY, FL 32401 | 59-0863698 | 501(C)(3) | 101,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF HOWARD COUNTY &<br>TIPTON COUNTIES - 125 N. BUCKEYE<br>ST. - KOKOMO, IN 46901 | 35-0877579 | 501(C)(3) | 100,000. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF PICKENS COUNTY (SC)<br>PO BOX 96<br>EASLEY, SC 29641 | 57-0476249 | 501(C)(3) | 100,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF HENDERSON COUNTY,<br>INC. (NC) - PO BOX 487 -<br>HENDERSONVILLE, NC 28793 | 56-0890133 | 501(C)(3) | 97,181. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF RUTHERFORD COUNTY,<br>INC (NC) - 688 WITHROW ROAD -<br>FOREST CITY, NC 28043 | 56-1030597 | 501(C)(3) | 78,707. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF AIKEN COUNTY, INC.<br>(SC) - 235 BARNWELL AVE. NW -<br>AIKEN, SC 29829 | 57-0360086 | 501(C)(3) | 78,200. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREENVILLE COUNTY,<br>INC. (SC) - 105 EDINBURGH COURT -<br>GREENVILLE, SC 29615 | 57-0362066 | 501(C)(3) | 75,142. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| TREMENDOUS LLC<br>228 PARK AVE S, #62949<br>NEW YORK, NY 10003 | 27-3255372 | 501(C)(3) | 75,000. | 0. | | | HUMAN & SOCIAL SERVICES |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF GREATER KANSAS CITY, INC. - 4801 MAIN STREET SUIT #425 - KANSAS CITY, MO 64112 | 44-0545812 | 501(C)(3) | 73,956. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF NORTHEAST FLORIDA, INC. - 40 E. ADAMS STREET, SUITE 310 - JACKSONVILLE, FL 32202 | 59-0637825 | 501(C)(3) | 73,460. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE COASTAL EMPIRE, INC. - 428 BULL STREET - SAVANNAH, GA 31401 | 58-0623603 | 501(C)(3) | 72,700. | 0. | | | HUMAN & SOCIAL SERVICES, DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| UNITED WAY OF GREATER GREENSBORO 1500 YANCEYVILLE STREET GREENSBORO, NC 27405 | 56-0668555 | 501(C)(3) | 72,267. | 0. | | | COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT, EDUCATION |
| UNITED WAY OF KING COUNTY 720 2ND AVE SEATTLE, WA 98104 | 91-0565555 | 501(C)(3) | 72,250. | 0. | | | HUMAN & SOCIAL SERVICES, EDUCATION |
| UNITED WAY OF CLEVELAND COUNTY, INC. (NC) - PO BOX 2242 - SHELBY, NC 28150 | 56-6030073 | 501(C)(3) | 70,499. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF THE LAKELANDS (SC) 929 PHOENIX STREET GREENWOOD, SC 29646 | 57-6005943 | 501(C)(3) | 67,237. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF HAYWOOD COUNTY, INC. (NC) - PO BOX 1139 - WAYNESVILLE, NC 28786 | 23-7112548 | 501(C)(3) | 66,526. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF NORTH CENTRAL NEW MEXICO - 2340 ALAMO AVE, SE 2ND FLOOR C/O ED RIVERA - ALBUQUERQUE, NM 87106 | 85-0277138 | 501(C)(3) | 61,185. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH, COMMUNITY ENGAGEMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF CENTRAL ALABAMA, INC. - 3600 8TH AVENUE SOUTH - BIRMINGHAM, AL 35222 | 63-0288846 | 501(C)(3) | 55,528. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF ANDERSON COUNTY (SC) 604 N MURRAY AVENUE ANDERSON, SC 29624 | 57-0510602 | 501(C)(3) | 55,138. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SOUTH CENTRAL GEORGIA - PO BOX 557 - TIFTON, GA 31793 | 58-0948599 | 501(C)(3) | 54,722. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREATER KNOXVILLE 1301 HANNAH AVENUE KNOXVILLE, TN 37921 | 62-0475748 | 501(C)(3) | 54,500. | 0. | | | COMMUNITY DEVELOPMENT, HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF GREATER ST. LOUIS 910 N 11TH STREET SAINT LOUIS, MO 63101 | 43-0714167 | 501(C)(3) | 54,050. | 0. | | | DISASTER RELIEF & RECOVERY, HUMAN & SOCIAL SERVICES |
| UNITED WAY OF EAST TENNESSEE HIGHLANDS - PO BOX 4039 - JOHNSON CITY, TN 37602 | 62-6001105 | 501(C)(3) | 52,500. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| UNITED WAY OF GREATER NASHVILLE 250 VENTURE CIRCLE NASHVILLE, TN 37228 | 62-0533104 | 501(C)(3) | 52,107. | 0. | | | COMMUNITY ENGAGEMENT |
| HANDSON RIVER REGION 211 1537 JEAN STREET MONTGOMERY, AL 36107 | 63-0663412 | 501(C)(3) | 51,850. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF CHARLOTTE COUNTY, INC. (FL) - 17831 MURDOCK CIRCLE, SUITE A - PORT CHARLOTTE, FL 33948 | 59-1149995 | 501(C)(3) | 51,474. | 0. | | | DISASTER RELIEF & RECOVERY |

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|---|---|---|---|---|---|---|---|
| UNITED WAY OF KENTUCKY<br>334 E BROADWAY STE 308<br>LOUISVILLE, KY 40202 | 31-1106795 | 501(C)(3) | 51,000. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF ACADIANA<br>PO BOX 52033<br>LAFAYETTE, LA 70505 | 72-0513639 | 501(C)(3) | 51,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF CENTRAL FLORIDA<br>5605 US HWY 98 S<br>LAKELAND, FL 33812 | 59-2116280 | 501(C)(3) | 50,500. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| DELAWARE HELPLINE INC.<br>625 N. ORANGE STREET, 3RD FLOOR<br>WILMINGTON, DE 19801 | 51-0376406 | 501(C)(3) | 50,000. | 0. | | | COMMUNITY DEVELOPMENT |
| MAUI UNITED WAY<br>PO BOX 275<br>KAHULUI, HI 96733 | 99-0086524 | 501(C)(3) | 50,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| 2-1-1 NEW YORK INC<br>800 TROY SCHENECTADY ROAD<br>LATHAM, NY 12110 | 35-2381188 | 501(C)(3) | 50,000. | 0. | | | HEALTH |
| UNITED WAY OF WISCONSIN<br>2059 ATWOOD AVE.<br>MADISON, WI 53704 | 39-1609340 | 501(C)(3) | 50,000. | 0. | | | HEALTH |
| MICHIGAN 2-1-1<br>330 MARSHALL ST. STE 211<br>LANSING, MI 48912 | 05-0609172 | 501(C)(3) | 50,000. | 0. | | | HEALTH |
| UNITED WAY OF SOUTHWEST VIRGINIA<br>PO BOX 644<br>ABINGDON, VA 24212 | 54-0739250 | 501(C)(3) | 50,000. | 0. | | | DISASTER RELIEF & RECOVERY |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

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| UNITED WAY OF GREATER RICHMOND & PETERSBURG - 7814 CAROUSEL LANE, #400 - RICHMOND, VA 23294 | 23-7375346 | 501(C)(3) | 49,250. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF SOUTHEAST GEORGIA, INC. - 515 DENMARK STREET, SUITE 2300 - STATESBORO, GA 30458 | 58-1427518 | 501(C)(3) | 47,965. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF VOLUSIA-FLAGLER CO., INC. - 1530 CORNERSTONE BLVD - DAYTONA BEACH, FL 32124 | 59-1099774 | 501(C)(3) | 46,000. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| INTERFACE CHILDREN & FAMILY SERVICES - 4001 MISSION OAKS BLVD. SUITE 1 - CAMARILLO, CA 93012 | 95-2944459 | 501(C)(3) | 44,057. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF WILSON COUNTY, INC. PO BOX 1147 WILSON, NC 27894 | 56-6021445 | 501(C)(3) | 44,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF PALM BEACH COUNTY 477 S ROSEMARY AVE, STE 230 WEST PALM BEACH, FL 33401 | 59-0683258 | 501(C)(3) | 42,833. | 0. | | | COMMUNITY ENGAGEMENT, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF BUFFALO & ERIE COUNTY - 742 CLEVELAND AVENUE, - BUFFALO, NY 14209 | 16-0743969 | 501(C)(3) | 42,750. | 0. | | | ECONOMIC MOBILITY, HUMAN & SOCIAL SERVICES, DISASTER RELIEF & RECOVERY |
| UNITED WAY OF NORTH CAROLINA 1130 KILDARE FARM ROAD, SUITE 100 CARY, NC 27511 | 56-0564547 | 501(C)(3) | 42,200. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF CONNECTICUT INC. 55 CAPITAL BOULEVARD SUITE 301 ROCKY HILL, CT 06067 | 06-1084194 | 501(C)(3) | 41,200. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |

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| UNITED WAY OF GREATER TRIANGLE, INC. - PO BOX 110583 - DURHAM, NC 27709 | 56-1949103 | 501(C)(3) | 41,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF ST. LUCIE & OKEECHOBEE - 4800 S US HIGHWAY 1 - FORT PIERCE, FL 34982 | 59-6212157 | 501(C)(3) | 40,083. | 0. | | | HUMAN & SOCIAL SERVICES, DISASTER RELIEF & RECOVERY |
| HOLY ASSEMBLY CHURCH OF GOD IN CHRIST - 55 EAST VILLA STREET - PASADENA, CA 91103 | 95-2502252 | 501(C)(3) | 40,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| VIA VISUALLY IMPAIRED ADVANCEMENT WNY - 1170 MAIN STREET - BUFFALO, NY 14209 | 16-0743930 | 501(C)(3) | 39,200. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF PIERCE COUNTY 1501 PACIFIC AVE, STE, 400 TACOMA, WA 98402 | 91-0650669 | 501(C)(3) | 39,075. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF WESTCHESTER AND PUTNAM, INC. - 336 CENTRAL PARK AVE - WHITE PLAINS, NY 10606 | 13-1997636 | 501(C)(3) | 38,500. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF SOUTH HAMPTON ROADS 2515 WALMER AVENUE NORFOLK, VA 23513 | 54-0506322 | 501(C)(3) | 35,610. | 0. | | | COMMUNITY ENGAGEMENT, EDUCATION |
| UNITED WAY OF TARRANT COUNTY 201 NORTH RUPERT STREET, SUITE 107 FORT WORTH, TX 76107 | 75-0858360 | 501(C)(3) | 35,000. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF APPLING COUNTY (GA) 606 PINEVIEW AVENUE BAXLEY, GA 31513 | 58-1847128 | 501(C)(3) | 34,732. | 0. | | | DISASTER RELIEF & RECOVERY |

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| UNITED WAY FOR GREATER AUSTIN<br>5930 MIDDLE FISKVILLE RD, 5TH FLOOR<br>AUSTIN, TX 78752 | 74-1193439 | 501(C)(3) | 34,617. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT, EDUCATION |
| UNITED WAY OF INDIAN RIVER COUNTY<br>PO BOX 1960<br>VERO BEACH, FL 32961 | 59-1087090 | 501(C)(3) | 33,333. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF SUWANNEE VALLEY<br>871 SW STATE ROAD 47<br>LAKE CITY, FL 32606 | 59-1262354 | 501(C)(3) | 33,333. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREATER STARK COUNTY<br>401 MARKET AVENUE NORTH, SUITE 300<br>CANTON, OH 44702 | 13-4254191 | 501(C)(3) | 32,803. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF LANE COUNTY<br>3171 GATEWAY LOOP<br>SPRINGFIELD, OR 97477 | 93-0394142 | 501(C)(3) | 31,775. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF LAURENS COUNTY, INC. (SC) - P.O. BOX 544 - CLINTON, SC 29325 | 23-7011064 | 501(C)(3) | 31,136. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF THE GREATER LEHIGH VALLEY - 1110 AMERICAN PARKWAY NORTHEAST, SUITE F-120 - ALLENTOWN, PA 18109 | 23-2657933 | 501(C)(3) | 31,000. | 0. | | | COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF SALT LAKE<br>257 E 200 SOUTH, SUITE 300<br>SALT LAKE CITY, UT 84111 | 93-2854627 | 501(C)(3) | 30,250. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF SUMMIT & MEDINA<br>37 N HIGH ST<br>AKRON, OH 44308 | 34-1169257 | 501(C)(3) | 30,147. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |

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| UNITED WAYS OF ALABAMA<br>624 SOUTH PERRY STREET<br>MONTGOMERY, AL 36104 | 75-3165175 | 501(C)(3) | 30,000. | 0. | | | HEALTH |
| GREENLINE HOUSING FOUNDATION<br>680 E COLORADO BLVD, SUITE 180<br>PASADENA, CA 91101 | 88-1242140 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| OUR OWN NON PROFIT, INC<br>6227 LA TIJERA BLVD<br>LOS ANGELES, CA 90056 | 83-2417177 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| WE WIN FOUNDATION<br>5886 SEMINOLE WAY<br>FONTANA, CA 92336 | 46-3125960 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| JEWISH FEDERATION COUNCIL OF GREATER LOS ANGELES - 6505 WILSHIRE BLVD, #800 - LOS ANGELES, CA 90048 | 95-1643388 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| BUDDHIST TZU CHI FOUNDATION<br>1100 S VALLEY CENTER AVE<br>SAN DIMAS, CA 91773 | 94-2952782 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| HUE YOU KNOW<br>176361 VENTURA BLVD, SUITE 329<br>ENCINO, CA 91316 | 36-4971746 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| PACIFIC SWING DANCE FOUNDATION INC<br>416 WEST WOODBURY ROAD #180<br>ALTADENA, CA 91001 | 83-0516173 | 501(C)(3) | 30,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF THE CAPITAL REGION<br>2235 MILLENNIUM WAY<br>ENOLA, PA 17025 | 23-1352095 | 501(C)(3) | 29,167. | 0. | | | COMMUNITY ENGAGEMENT |

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| UNITED WAY OF CENTRAL MARYLAND<br>1800 WASHINGTON BLVD, SUITE 340<br>BALTIMORE, MD 21230 | 52-0591543 | 501(C)(3) | 28,009. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF TOOMBS, MONTGOMERY AND WHEELER COUNTIES - P.O. BOX 352 - VIDALIA, GA 30475 | 58-1872000 | 501(C)(3) | 27,359. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF CENTRAL JERSEY<br>32 FORD AVE<br>MILLTOWN, NJ 08850 | 22-1520408 | 501(C)(3) | 26,250. | 0. | | | HUMAN & SOCIAL SERVICES |
| INDIANA UNITED WAYS<br>2955 N MERIDIAN STREET, SUITE 200<br>INDIANAPOLIS, IN 46208 | 35-1441961 | 501(C)(3) | 26,200. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF CITRUS COUNTY<br>1582 N MEADOWCREST BLVD<br>CRYSTAL RIVER, FL 34429 | 59-2766815 | 501(C)(3) | 26,155. | 0. | | | COMMUNITY DEVELOPMENT |
| NO FINISH LINES INC<br>177 E COLORADO BLVD, 2ND FLOOR<br>PASADENA, CA 91105 | 99-4087982 | 501(C)(3) | 26,087. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF THE CHATTAHOOCHEE VALLEY - PO BOX 1157 - COLUMBUS, GA 31902 | 58-0572434 | 501(C)(3) | 25,638. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE CROSSROADS<br>104 S WILLIAM STREET<br>VICTORIA, TX 77901 | 74-6024990 | 501(C)(3) | 25,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF HENRY COUNTY AND MARTINSVILLE - PO BOX 951 - MARTINSVILLE, VA 24114 | 54-0753318 | 501(C)(3) | 25,000. | 0. | | | COMMUNITY DEVELOPMENT |

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| GREAT RIVERS UNITED WAY, INC.<br>1855 E. MAIN ST.<br>ONALASKA, WI 54650 | 39-0848188 | 501(C)(3) | 25,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF MADISON COUNTY, INC.<br>701 ANDREW JACKSON WAY, NE<br>HUNTSVILLE, AL 35801 | 63-0366294 | 501(C)(3) | 24,770. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF NORTHERN NEW JERSEY<br>PO BOX 6835<br>BRIDGEWATER, NJ 88077 | 22-1487247 | 501(C)(3) | 22,750. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| NJ 2-1-1 PARTNERSHIP<br>16 WING DR., STE. 201<br>CEDAR KNOLLS, NJ 07927 | 22-3338917 | 501(C)(3) | 22,700. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF THE MID-SOUTH (TN)<br>1005 TILLMAN STREET<br>MEMPHIS, TN 38112 | 56-1010742 | 501(C)(3) | 22,500. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE MOHAWK VALLEY INC - 258 GENESEE STREET - UTICA, NY 13502 | 15-0532074 | 501(C)(3) | 22,275. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF THE BLUEGRASS<br>651 PERIMETER DR STE 510<br>LEXINGTON, KY 40517 | 61-0444579 | 501(C)(3) | 22,100. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF NORTHWEST VERMONT INC. - 412 FARRELL STREET, SUITE 200 - BURLINGTON, VT 05403 | 03-0217229 | 501(C)(3) | 21,436. | 0. | | | ECONOMIC MOBILITY |
| WYOMING 2-1-1, INC.<br>1007 EAST LINCOLNWAY<br>CHEYENNE, WY 82001 | 27-1295740 | 501(C)(3) | 20,250. | 0. | | | HUMAN & SOCIAL SERVICES |

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| UNITED WAY OF SOUTHWEST GEORGIA<br>PO BOX 70429<br>ALBANY, GA 31708 | 58-0655156 | 501(C)(3) | 20,000. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF VIRGINIA'S BLUE RIDGE - 325 CAMPBELL AVE SW - ROANOKE, VA 24016 | 54-0535302 | 501(C)(3) | 20,000. | 0. | | | COMMUNITY ENGAGEMENT |
| FIRST CALL FOR HELP OF BROWARD INC. DBA 2-1-1 BROWARD - 3317 NW 10TH TERRACE, SUITE #403 - FORT LAUDERDALE, FL 33309 | 65-0589294 | 501(C)(3) | 20,000. | 0. | | | HEALTH |
| 211 INFO<br>7515 NE AMBASSADOR PL C<br>PORTLAND, OR 97220 | 93-0784586 | 501(C)(3) | 20,000. | 0. | | | HEALTH |
| UNITED WAY OF CENTRAL GEORGIA<br>PO BOX 1302<br>MACON, GA 31202 | 58-0639811 | 501(C)(3) | 19,271. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT, EDUCATION |
| HEART OF MAINE UNITED WAY<br>700 MAIN STREET, SUITE 1<br>BANGOR, ME 04401 | 01-0211478 | 501(C)(3) | 18,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF RHODE ISLAND<br>50 VALLEY STREET<br>PROVIDENCE, RI 02909 | 05-0276059 | 501(C)(3) | 18,500. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF MARTIN COUNTY, INC.<br>10 SE CENTRAL PARKWAY, SUITE 101<br>STUART, FL 34994 | 23-7273540 | 501(C)(3) | 17,820. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF DELAWARE, INC.<br>625 N ORANGE STREET<br>WILMINGTON, DE 19801 | 51-0073399 | 501(C)(3) | 17,750. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |

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| INLAND SOUTHERN CALIFORNIA 211+<br>1835 CHICAGO AVENUE<br>RIVERSIDE, CA 92507 | 95-2287250 | 501(C)(3) | 16,875. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF THE BRAZOS VALLEY, INC. - 1716 BRIARCREST DRIVE, SUITE 155 - BRYAN, TX 77802 | 74-2050241 | 501(C)(3) | 16,750. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| HELPLINE CENTER, INC.<br>3817 S ELMWOOD AVENUE<br>SIOUX FALLS, SD 57108 | 23-7424387 | 501(C)(3) | 16,750. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| 211 BREVARD INC<br>1007 PATHFINDER WAY<br>ROCKLEDGE, FL 32955 | 59-1897447 | 501(C)(3) | 16,750. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| METRO UNITED WAY, INC.<br>334 E. BROADWAY<br>LOUISVILLE, KY 40202 | 61-0444680 | 501(C)(3) | 16,000. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF CALDWELL COUNTY<br>PO BOX 1316<br>LENOIR, NC 28645 | 56-6067038 | 501(C)(3) | 16,000. | 0. | | | DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT |
| TULSA AREA UNITED WAY<br>1430 S BOULDER AVE<br>TULSA, OK 74119 | 73-0580283 | 501(C)(3) | 16,000. | 0. | | | COMMUNITY DEVELOPMENT, HEALTH |
| GREEN MOUNTAIN UNITED WAY<br>652 GRANGER ROAD<br>BARRE, VT 05641 | 03-0261384 | 501(C)(3) | 15,600. | 0. | | | ECONOMIC MOBILITY |
| UNITED WAY OF KERSHAW COUNTY<br>PO BOX 737<br>CAMDEN, SC 29020 | 57-0717334 | 501(C)(3) | 15,266. | 0. | | | DISASTER RELIEF & RECOVERY |

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| UNITED WAYS OF IOWA<br>PO BOX 316<br>JOHNSTON, IA 50131 | 46-1216277 | 501(C)(3) | 15,000. | 0. | | | COMMUNITY ENGAGEMENT |
| FONDOS UNIDOS DE PUERTO RICO<br>PO BOX 191914<br>SAN JUAN, PR 00919 | 66-0269222 | 501(C)(3) | 15,000. | 0. | | | HEALTH |
| UNITED WAY OF GREATER CHATTANOOGA<br>PO BOX 4027<br>CHATTANOOGA, TN 37402 | 62-0565962 | 501(C)(3) | 15,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAYS OF THE PACIFIC NORTHWEST - 400 UNION AVE SE, STE 200 - OLYMPIA, WA 98501 | 91-1055031 | 501(C)(3) | 15,000. | 0. | | | DISASTER RELIEF & RECOVERY |
| UNITED WAY OF GREATER CINCINNATI<br>2400 READING ROAD<br>CINCINNATI, OH 45202 | 31-0537502 | 501(C)(3) | 14,000. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| MILE HIGH UNITED WAY<br>711 PARK AVENUE WEST<br>DENVER, CO 80205 | 84-0404235 | 501(C)(3) | 13,500. | 0. | | | HUMAN & SOCIAL SERVICES |
| EDEN 18 R<br>570 B STREET<br>HAYWARD, CA 94541 | 94-2339050 | 501(C)(3) | 13,500. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF NORTHWEST GEORGIA<br>816 S THORNTON AVE.,<br>DALTON, GA 30720 | 58-0905881 | 501(C)(3) | 13,000. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE GREATER CAPITAL REGION - 1 STEUBEN PLACE - ALBANY, NY 12207 | 14-1364505 | 501(C)(3) | 12,750. | 0. | | | HUMAN & SOCIAL SERVICES |

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| UNITED WAY OF WEST FLORIDA INC<br>1301 W GOVERNMENT ST<br>PENSACOLA, FL 32501 | 59-0651076 | 501(C)(3) | 12,500. | 0. | | | HEALTH |
| UNITED WAY OF CENTRAL OHIO<br>215 N FRONT STREET, STE 600<br>COLUMBUS, OH 43215 | 31-4393712 | 501(C)(3) | 12,500. | 0. | | | COMMUNITY ENGAGEMENT |
| 2-1-1 TAMPA BAY CARES, INC.<br>5500 RIO VISTA DR., SUITE 5500<br>CLEARWATER, FL 33760 | 59-3355555 | 501(C)(3) | 12,500. | 0. | | | HEALTH |
| MONEY MANAGEMENT INTERNATIONAL, INC.DBA NEVADA 211 - 8685 W. SAHARA STE 240 - LAS VEGAS, NV 89117 | 54-1837741 | 501(C)(3) | 11,907. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF CENTRAL & SOUTHERN UTAH - 148 N 100 W - PROVO, UT 84601 | 94-2851681 | 501(C)(3) | 11,375. | 0. | | | HUMAN & SOCIAL SERVICES, HEALTH |
| UNITED WAY OF CENTRAL WEST VIRGINIA - ONE UNITED WAY SQUARE - CHARLESTON, WV 25301 | 55-0402755 | 501(C)(3) | 11,000. | 0. | | | COMMUNITY ENGAGEMENT |
| MASS 211, INC.<br>46 PACK STREET<br>FRAMINGHAM, MA 01702 | 04-3514643 | 501(C)(3) | 10,800. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF SOUTHERN KENTUCKY, INC. - 1110 COLLEGE STREET - BOWLING GREEN, KY 42102 | 61-0590564 | 501(C)(3) | 10,750. | 0. | | | HEALTH, COMMUNITY ENGAGEMENT |
| UNITED WAY OF ANCHORAGE<br>PO BOX 200108<br>ANCHORAGE, AK 99520 | 92-0027948 | 501(C)(3) | 10,000. | 0. | | | HEALTH |

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| UNITED WAY OF YAVAPAI COUNTY, INC.<br>1678 OAKLAWN DRIVE, STE A<br>PRESCOTT, AZ 86305 | 86-0610730 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF CENTRAL ARKANSAS<br>1107 MAIN STREET<br>CONWAY, AR 72032 | 23-7222534 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAYS OF CALIFORNIA<br>1107 FAIR OAKS AVENUE, SUITE 12<br>SOUTH PASADENA, CA 91030 | 94-1646369 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF HALL COUNTY, INC.<br>PO BOX 2656<br>GAINESVILLE, GA 30501 | 58-6011393 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF SOUTH CENTRAL IDAHO<br>253 4TH AVE N.<br>TWIN FALLS, ID 83301 | 82-0256978 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF JOHNSON & WASHINGTON COUNTIES - 160 SOUTHGATE AVENUE -<br>IOWA CITY, IA 52240 | 42-6062055 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF THE PLAINS<br>245 N. WATER ST.<br>WICHITA, KS 67202 | 48-0547688 | 501(C)(3) | 10,000. | 0. | | | HEALTH |
| ASSOCIATION OF LOUISIANA UNITED WAYS - P.O. BOX 3416 - BATON<br>ROUGE, LA 70821 | 20-4586416 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF MID COAST MAINE<br>34 WING FARM PARKWAY, SUITE 201<br>BATH, ME 04530 | 01-6004866 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| MICHIGAN ASSOCIATION OF UNITED WAYS - 330 MARSHALL STREET, SUITE 211 - LANSING, MI 48912 | 38-1359596 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF CENTRAL MINNESOTA 921 1ST STREET NORTH, STE 200 SAINT CLOUD, MN 56303 | 41-0915124 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF THE CAPITAL AREA, INC. - 843 NORTH PRESIDENT STREET - JACKSON, MS 39202 | 64-0303075 | 501(C)(3) | 10,000. | 0. | | | HEALTH |
| UNITED WAY OF NORTHWEST OKLAHOMA, INC. - 401 WEST BROADWAY AVE, STE 223 - ENID, OK 73701 | 73-0582549 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| UNITED WAY OF PENNSYLVANIA 240 N 3RD STREET HARRISBURG, PA 17101 | 23-1672348 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF LANCASTER COUNTY 1910 HARRINGTON DR LANCASTER, PA 17601 | 23-1352093 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAYS OF TEXAS 106 E 6TH STREET, SUITE 900-116 AUSTIN, TX 78701 | 74-1618608 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF SAN ANTONIO AND BEXAR COUNTY - P.O. BOX 898 - SAN ANTONIO, TX 78148 | 74-1272381 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF VIRGINIA 2515 WALMER AVENUE NORFOLK, VA 23513 | 54-0560586 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| UNITED WAY OF BENTON & FRANKLIN COUNTIES - 401 N YOUNG ST - KENNEWICK, WA 99336 | 91-0682177 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY DEVELOPMENT |
| 211 PALM BEACH TREASURE COAST, INC. - P.O. BOX 3588 - LANTANA, FL 33465 | 23-7153017 | 501(C)(3) | 10,000. | 0. | | | HEALTH |
| UNITED WAY OF NEW YORK STATE 800 TROY-SCHENECTADY ROAD LATHAM, NY 12110 | 14-1705108 | 501(C)(3) | 10,000. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF FREDERICK COUNTY, INC. - 629 N.MARKET STREET - FREDERICK, MD 21705 | 52-0607973 | 501(C)(3) | 9,602. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY OF BROWARD COUNTY INC ANSIN BUILDING 1300 S. ANDREWS AVEN FORT LAUDERDALE, FL 33316 | 59-0624402 | 501(C)(3) | 9,500. | 0. | | | COMMUNITY ENGAGEMENT |
| LUMBER RIVER UNITED WAY PO BOX 2652 LUMBERTON, NC 28359 | 58-1636285 | 501(C)(3) | 9,500. | 0. | | | COMMUNITY DEVELOPMENT, COMMUNITY ENGAGEMENT |
| UNITED WAY OF CENTRAL SHENANDOAH VALLEY, INC - P.O. BOX 326 - HARRISONBURG, VA 22807 | 54-0632716 | 501(C)(3) | 8,575. | 0. | | | HUMAN & SOCIAL SERVICES, COMMUNITY ENGAGEMENT |
| UNITED WAY ASSOCIATION OF SOUTH CAROLINA - 1818 BLANDING STREET - COLUMBIA, SC 29201 | 57-0515275 | 501(C)(3) | 8,500. | 0. | | | HEALTH |
| UNITED WAY OF GREATER HIGH POINT, INC. - 815 PHILLIPS AVE - HIGH POINT, NC 27262 | 56-0547486 | 501(C)(3) | 8,000. | 0. | | | COMMUNITY ENGAGEMENT |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| TRIDENT UNITED WAY<br>PO BOX 63305<br>NORTH CHARLESTON, SC 29419 | 57-0314378 | 501(C)(3) | 8,000. | 0. | | | COMMUNITY ENGAGEMENT |
| JEWISH COMMUNITY SERVICES OF SOUTH FLORIDA - 12000 BISCAYNE BLVD, SUITE 303 - MIAMI, FL 33142 | 59-0637867 | 501(C)(3) | 8,000. | 0. | | | HEALTH |
| VOLUNTEERS OF AMERICA- WESTERN WASHINGTON - 2802 BROADWAY - EVERETT, WA 98201 | 91-0577129 | 501(C)(3) | 7,500. | 0. | | | HEALTH |
| UNITED WAY OF ALAMANCE COUNTY, INC. - 220 EAST FRONT STREET - BURLINGTON, NC 27215 | 56-0599239 | 501(C)(3) | 7,000. | 0. | | | COMMUNITY ENGAGEMENT |
| RIVER CITIES UNITED WAY<br>PO BOX 966<br>LAKE HAVASU CITY, AZ 86405 | 23-7373816 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF CENTRAL EASTERN CALIFORNIA - 1707 EYE ST, 3RD FLOOR - BAKERSFIELD, CA 93301 | 95-2274560 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF LAKE COUNTY, INC.<br>330 SOUTH GREENLEAF STREET<br>GURNEE, IL 60031 | 36-2167949 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF CENTRAL IOWA<br>1111 NINTH STREET, SUITE 100<br>DES MOINES, IA 50314 | 42-0680425 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF NORTHEAST LOUISIANA<br>1201 HUDSON LANE<br>MONROE, LA 71201 | 72-0498515 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |

**Part II** **Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments** (Schedule I (Form 990), Part II.)

| (a) Name and address of organization or government | (b) EIN | (c) IRC section if applicable | (d) Amount of cash grant | (e) Amount of noncash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|---|---|---|---|---|---|---|---|
| UNITED WAY OF SOUTHEAST MISSOURI<br>16 NORTH SPANISH ST<br>CAPE GIRARDEAU, MO 63701 | 43-0991233 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF BRISTOL, TN-VA<br>PO BOX 696<br>BRISTOL, TN 37621 | 62-0476656 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| UNITED WAY OF THE WINE COUNTRY<br>975 CORPORATE CENTER PARKWAY SUITE<br>SANTA ROSA, CA 95407 | 94-1669646 | 501(C)(3) | 6,750. | 0. | | | HUMAN & SOCIAL SERVICES |
| GREATER TWIN CITIES UNITED WAY<br>404 S 8TH STREET<br>MINNEAPOLIS, MN 55404 | 41-1973442 | 501(C)(3) | 6,426. | 0. | | | HUMAN & SOCIAL SERVICES |
| FOND DU LAC AREA UNITED WAY, INC.<br>74 SOUTH MAIN STREET, #201<br>FOND DU LAC, WI 54935 | 39-0806194 | 501(C)(3) | 6,350. | 0. | | | HUMAN & SOCIAL SERVICES,<br>COMMUNITY DEVELOPMENT |
| UNITED WAY OF CENTRAL NEW YORK INC<br>980 JAMES ST<br>SYRACUSE, NY 13203 | 15-0532073 | 501(C)(3) | 6,105. | 0. | | | HUMAN & SOCIAL SERVICES |
| PEOPLE FOR PEOPLE<br>302 W LINCOLN AVENUE<br>YAKIMA, WA 98902 | 91-0783226 | 501(C)(3) | 6,000. | 0. | | | HEALTH |
| UNITED WAY CAPE FEAR AREA<br>127 GRACE STREET<br>WILMINGTON, NC 28403 | 56-0529949 | 501(C)(3) | 5,100. | 0. | | | COMMUNITY ENGAGEMENT |
| UNITED WAY OF THE DUTCHESS -<br>ORANGE REGION - 75 MARKET STREET -<br>POUGHKEEPSIE, NY 12601 | 06-1045698 | 501(C)(3) | 5,076. | 0. | | | HUMAN & SOCIAL SERVICES |

**Part III** **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

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

PART I, LINE 2:
PROCEDURES FOR MONITORING USE OF GRANT FUNDS
GRANTEES ARE REQUIRED TO SUBMIT A NARRATIVE PROPOSAL AND BUDGET ABOUT THE
PROJECT FOR WHICH FUNDING IS BEING REQUESTED IN ORDER TO BE CONSIDERED FOR
FUNDING. WHEN FUNDS ARE AWARDED, THE GRANTEE IS REQUIRED TO SIGN A BINDING
CONTRACT WHICH ESTABLISHES THE PURPOSE OF THE FUNDING AND, WHEN APPLICABLE,
REQUIRES THE SUBMISSION OF AN INTERIM AND FINAL FINANCIAL REPORT, ALONG
WITH THE NARRATIVE REPORTS, DETAILING THE ACTUAL EXPENSES AND DESCRIBING
THE ACTUAL USAGE OF THE AWARDED FUNDS. THE FINANCIAL REPORTS MUST BE SIGNED
BY THE AUTHORIZED PERSONNEL OF THE GRANTEE ORGANIZATION. THESE REPORTS ARE
REVIEWED BY THE DESIGNATED UNITED WAY WORLDWIDE MANAGER OVERSEEING THE
PROJECT(S), AND THEN COMPARED TO THE ORIGINAL PROPOSAL SUBMITTED WHEN
FUNDING IS REQUESTED.

PART II, LINE 1, COLUMN (H):
NAME OF ORGANIZATION OR GOVERNMENT:
UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NEW JERSEY
(H) PURPOSE OF GRANT OR ASSISTANCE: HUMAN & SOCIAL SERVICES, COMMUNITY

**Part IV Supplemental Information**

DEVELOPMENT, DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT

NAME OF ORGANIZATION OR GOVERNMENT: UNITED WAY OF GREATER HOUSTON
(H) PURPOSE OF GRANT OR ASSISTANCE: HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, HEALTH, COMMUNITY ENGAGEMENT, EDUCATION

NAME OF ORGANIZATION OR GOVERNMENT: UNITED WAY OF NEW YORK CITY
(H) PURPOSE OF GRANT OR ASSISTANCE: HUMAN & SOCIAL SERVICES, COMMUNITY DEVELOPMENT, DISASTER RELIEF & RECOVERY, COMMUNITY ENGAGEMENT

**SCHEDULE J (Form 990)**

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

# Compensation Information

**For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**
**Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization

UNITED WAY WORLDWIDE

**Employer identification number**

13-1635294

## 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. | | |
| | [X] First-class or charter travel | | |
| | [ ] Travel for companions | | |
| | [ ] Tax indemnification 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 (such as maid, chauffeur, chef) | | |
| **b** | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain **1b** | X | |
| **2** | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? **2** | X | |
| **3** | Indicate which, if any, of the following the 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. | | |
| | [X] Compensation committee | | |
| | [X] Independent compensation consultant | | |
| | [X] Form 990 of other organizations | | |
| | [ ] Written employment contract | | |
| | [X] Compensation survey or study | | |
| | [X] Approval by the board or compensation committee | | |
| **4** | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization: | | |
| **a** | Receive a severance payment or change-of-control payment? **4a** | | X |
| **b** | Participate in or receive payment from a supplemental nonqualified retirement plan? **4b** | | X |
| **c** | Participate in or receive payment from an equity-based compensation arrangement? **4c** | | X |
| | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. | | |
| | **Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.** | | |
| **5** | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of: | | |
| **a** | The organization? **5a** | | X |
| **b** | Any related organization? **5b** | | X |
| | If "Yes" on line 5a or 5b, describe in Part III. | | |
| **6** | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of: | | |
| **a** | The organization? **6a** | | X |
| **b** | Any related organization? **6b** | | X |
| | 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 on lines 5 and 6? If "Yes," describe in Part III **7** | X | |
| **8** | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III **8** | | X |
| **9** | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)? **9** | | |

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

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

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

| **(A)** Name and Title | | **(B)** Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC compensation | | | **(C)** Retirement and other deferred compensation | **(D)** Nontaxable benefits | **(E)** Total of columns (B)(i)-(D) | **(F)** Compensation in column (B) reported as deferred on prior Form 990 |
|---|---|---|---|---|---|---|---|---|
| | | **(i)** Base compensation | **(ii)** Bonus & incentive compensation | **(iii)** Other reportable compensation | | | | |
| (1) ANGELA WILLIAMS | (i) | 653,830. | 168,794. | 31,370. | 14,000. | 41,486. | 909,480. | 0. |
| CHIEF EXECUTIVE OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (2) BRUCE FRIEDMAN | (i) | 415,220. | 42,945. | 9,816. | 14,430. | 52,306. | 534,717. | 0. |
| EVP, CHIEF FINANCIAL OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (3) BYRON GARRETT (THRU 10/25) | (i) | 364,962. | 116,233. | 25,892. | 15,229. | 8,820. | 531,136. | 0. |
| EVP, CHIEF REVENUE OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (4) ODESSA JACKSON PETERSON | (i) | 417,060. | 46,134. | 14,456. | 14,461. | 4,388. | 496,499. | 0. |
| EVP, GENERAL COUNSEL, CC & EO | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (5) JOHN FARDEN | (i) | 423,837. | 41,754. | 5,608. | 15,670. | 0. | 486,869. | 0. |
| EVP, GLOBAL NTWK ADV & OPERATIONS | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (6) OMOIYE KINNEY | (i) | 356,681. | 40,569. | 6,636. | 15,623. | 15,988. | 435,497. | 0. |
| EVP, MARKETING & COMMUNICATION | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (7) LADAWN NAEGLE | (i) | 325,163. | 34,676. | 15,876. | 14,322. | 29,971. | 420,008. | 0. |
| EVP, CHIEF OF STAFF | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (8) SONYA ANDERSON | (i) | 333,385. | 18,641. | 6,582. | 9,485. | 27,620. | 395,713. | 0. |
| EVP, INTERNATIONAL NETWORK | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (9) LAWANA JONES (THRU 10/25) | (i) | 318,055. | 24,138. | 18,553. | 14,313. | 19,614. | 394,673. | 0. |
| SVP, CHIEF TECHNOLOGY OFF | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (10) THOMAS LOWERY | (i) | 285,165. | 25,950. | 15,536. | 12,658. | 27,930. | 367,239. | 0. |
| SVP, NETWORK RESILIENCE | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (11) CHAD ROYAL-PASCOE | (i) | 279,314. | 0. | 9,016. | 12,194. | 40,784. | 341,308. | 0. |
| SVP, GLOBAL RESOURCE DEVELOPMENT | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (12) ERIN BUDDE | (i) | 249,205. | 24,312. | 9,106. | 16,027. | 40,175. | 338,825. | 0. |
| SVP, STRATEGIC INSIGHTS | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (13) DONNA STEWART | (i) | 291,137. | 15,000. | 10,973. | 2,053. | 15,692. | 334,855. | 0. |
| EVP, CHIEF HUMAN RESOURCES OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| (14) KEBA MARSHALL | (i) | 273,802. | 3,990. | 6,044. | 11,625. | 13,690. | 309,151. | 0. |
| SVP, CHIEF RISK OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |

**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.

PART I, LINE 1A:

THE PRESIDENT & CHIEF EXECUTIVE OFFICER WAS REIMBURSED FOR INTERNATIONAL FIRST CLASS AIR TRAVEL WHEN TRAVELING FOR BUSINESS PURPOSES ON SOME FLIGHTS LONGER THAN FOUR HOURS. SUCH TRIPS ARE SUBJECT TO RULES OF THE ORGANIZATION'S ACCOUNTABLE PLAN AND CONSIDERED NON-TAXABLE IF PAID BY UWW.

PART I, LINE 3:

THE EXECUTIVE COMPENSATION COMMITTEE ("THE COMMITTEE") OF THE BOARD OF TRUSTEES OF UNITED WAY WORLDWIDE ("UWW") IS RESPONSIBLE FOR GOVERNANCE AND OVERSIGHT OF COMPENSATION AND BENEFITS PROGRAMS FOR THE UWW CHIEF EXECUTIVE OFFICER AND OTHER EXECUTIVE LEVEL STAFF ("EXECUTIVES"), AND FOR ENSURING THAT THE COMPENSATION POLICIES OF UWW ARE CONSISTENT WITH AND IN SUPPORT OF THE ORGANIZATION'S MISSION, VALUES AND GOALS.

ON AN ANNUAL BASIS, THE COMMITTEE IS RESPONSIBLE FOR EVALUATING THE PERFORMANCE OF THE CEO AND RECOMMENDING TO THE FULL BOARD OF TRUSTEES FOR APPROVAL ANY ADJUSTMENTS TO HIS OR HER COMPENSATION AND BENEFITS, INCLUDING INCENTIVE AWARDS. THE COMMITTEE IS ALSO RESPONSIBLE FOR REVIEWING FOR REASONABLENESS THE CEO'S RECOMMENDATIONS FOR COMPENSATION AND BENEFITS OF THE OTHER EXECUTIVES. FINALLY, THE COMMITTEE IS 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 OR THE EXECUTIVES.

THE COMMITTEE ENGAGES A THIRD-PARTY CONSULTANT TO PROVIDE COMPENSATION DATA FROM COMPARABLE ORGANIZATIONS ON AT LEAST A BIENNIAL BASIS. THE COMMITTEE REVIEWS AND DISCUSSES THAT DATA BEFORE DETERMINING THE COMPENSATION OF THE CEO AND REASONABLENESS OF THE COMPENSATION OF OTHER EXECUTIVES. SUCH DECISION IS DOCUMENTED CONTEMPORANEOUSLY BY THE COMMITTEE.

PART I, LINE 7:

THE EXECUTIVE MANAGEMENT TEAM IS PAID A BONUS BASED UPON A COMBINATION OF INDIVIDUAL PERFORMANCE GOALS APPROVED BY THE BOARD AND THE PERFORMANCE OF THE ORGANIZATION. IT IS NOT A MATRIX-BASED ON A SCORE, BUT IS SOMEWHAT DISCRETIONARY.

THE CEO BONUS IS DETERMINED BY THE EXECUTIVE COMMITTEE OF THE BOARD OF TRUSTEES.

**SCHEDULE M (Form 990)**

Department of the Treasury
Internal Revenue Service

# Noncash Contributions

**Complete if the organizations answered "Yes" on Form 990, Part IV, line 29 or 30.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**2025**

**Open to Public Inspection**

Name of the organization

UNITED WAY WORLDWIDE

**Employer identification number**

13-1635294

## 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 | 10,209 | 2,206,087. | 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 ( ) | | | | |

| | | | Yes | No |
|---|---|---|---|---|
| 29 | Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgment | 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 3 years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period? | 30a | | X |
| b | If "Yes," describe the arrangement in Part II. | | | |
| 31 | Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions? | 31 | X | |
| 32a | Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions? | 32a | | X |
| b | If "Yes," describe in Part II. | | | |
| 33 | If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II. | | | |

**Part II** **Supplemental Information.** Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also, complete this part for any additional information.

SCHEDULE M, PART I, COLUMN (B):
SECURITIES - PUBLICLY TRADED
REPORTING THE NUMBER OF SEPARATE SHARES RECEIVED ON SCHEDULE M, PART I,
LINE 9.

**SCHEDULE O (Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

# Supplemental Information to Form 990 or 990-EZ

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

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization
UNITED WAY WORLDWIDE

**Employer identification number**
13-1635294

FORM 990, PART III, LINE 1
ORGANIZATION'S MISSION
FOR 139 YEARS, THE UNITED WAY NETWORK HAS SERVED AS A VEHICLE FOR VOLUNTEERS, DONORS, PARTNERS AND ADVOCATES WHO SEEK TO CHANGE LIVES AND COMMUNITIES THROUGH SERVICE, COLLABORATION AND IMPACT. AS ONE OF THE WORLD'S LARGEST PRIVATELY FUNDED CHARITIES, THE UNITED WAY NETWORK SERVES 95% OF U.S. COMMUNITIES AND 30 COUNTRIES AND TERRITORIES. UWW SEEKS TO SUPPORT THE NETWORK IN ADVANCING THE COLLECTIVE MISSION OF UNITED WAY TO IMPROVE LIVES BY MOBILIZING THE CARING POWER OF COMMUNITIES AROUND THE WORLD. IN 2025 UNITED WAY WAS THE MISSION OF CHOICE FOR 1.4 MILLION VOLUNTEERS, 4.6 MILLION DONORS, AND 32,000 CORPORATE PARTNERS IN TENS OF THOUSANDS OF COMMUNITIES WORLDWIDE.

UNITED WAY WORLDWIDE (UWW) IS THE NETWORK'S GLOBAL LEADERSHIP ORGANIZATION, BASED IN ALEXANDRIA, VIRGINIA. UWW SEEKS TO SUPPORT THE NETWORK IN ADVANCING THE COLLECTIVE MISSION OF UNITED WAY TO IMPROVE LIVES BY MOBILIZING THE CARING POWER OF COMMUNITIES AROUND THE WORLD. UWW PROVIDES SUPPORT FOR THE GLOBAL NETWORK IN KEY PROGRAMMATIC AREAS OF BRAND STEWARDSHIP, GLOBAL FUNDRAISING AT SCALE, ADVOCACY AND PUBLIC POLICY, AND LEADERSHIP DEVELOPMENT AND TRAINING. UWW IS LARGELY FUNDED BY MEMBERSHIP DUES FROM THE UNITED WAY NETWORK. THESE LOCAL, STATE, REGIONAL AND COUNTY UNITED WAYS ACROSS THE WORLD ARE AUTONOMOUS CHARITABLE ORGANIZATIONS.

FORM 990, PART III, LINE 4A, DESCRIPTION OF PROGRAM SERVICE:
GLOBAL NETWORK ADVANCEMENT - THE GLOBAL NETWORK ADVANCEMENT TEAM PROVIDES GOVERNANCE, RESOURCE DEVELOPMENT, PROGRAM AND CAPACITY BUILDING SUPPORT, MEMBER GRANT DISTRIBUTION SERVICES, AND TRAINING TO UNITED WAY MEMBERS AROUND THE WORLD.

FORM 990, PART III, LINE 4B, DESCRIPTION OF PROGRAM SERVICE:
DONOR ADVISED GIVING (DOMESTIC AND INTERNATIONAL) - THE UNITED WAY DONOR ADVISED GIVING PROGRAM (DAF & IDAG) FACILITATES GRANTS TO DOMESTIC AND INTERNATIONAL ORGANIZATIONS, BASED ON RECOMMENDATIONS BY PROGRAM CONTRIBUTORS THAT MEET PROGRAMMATIC OR GEOGRAPHIC INTERESTS OF BOTH THE DONOR AND UNITED WAY WORLDWIDE.

FORM 990, PART III, LINE 4C, DESCRIPTION OF PROGRAM SERVICE:
BRAND STRATEGY AND MARKETING - THE GLOBAL BRAND STRATEGY AND MARKETING TEAM PROVIDES SUPPORT IN ALL BRAND IDENTITY TO UNITED WAY MEMBERS AND CONSISTENCY MATTERS INCLUDING MARKETING, ADVERTISING AND OUR PROMOTIONAL OPPORTUNITIES DESIGNED TO PROMOTE INDIVIDUAL PARTICIPATION IN ADVANCING THE COMMON GOOD AND TO STRENGTHEN TRUST IN THE UNITED WAY BRAND AROUND THE WORLD.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
OTHER PROGRAM SERVICES - SUPPORT FOR THE 211 PLATFORM WHICH PROVIDES COMPREHENSIVE INFORMATION ON LOCAL RESOURCES AND SERVICES THROUGHOUT THE COUNTRY, THE PRODUCTION AND DELIVERY OF TRAINING PROGRAMS AND LEARNING OPPORTUNITIES FOR UNITED WAY VOLUNTEERS, STAFF, AND PARTNERS; AND PROVIDING LICENSING RIGHTS TO SELECT VENDORS TO SELL PROMOTIONAL PRODUCTS BEARING THE UNITED WAY BRAND AND TRADEMARKS.

Name of the organization: UNITED WAY WORLDWIDE

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TOTAL PART III, LINE 4D AMOUNTS ARE REPORTED BELOW:
EXPENSES $ 9,439,088. INCL GRANTS OF $ 5,055,379. REVENUE $ 33,459,740.

FORM 990, PART VI, SECTION A, LINE 6:
CLASSES OF MEMBERS
THE ORGANIZATION HAS ONE CLASS OF MEMBERS. MEMBER RIGHTS AND RESPONSIBILITIES ARE DEFINED IN THE ORGANIZATION'S BYLAWS AND MEMBERSHIP LICENSE AGREEMENT. EACH MEMBER HAS ONE VOTE ON MATTERS REQUIRING MEMBER APPROVAL PER THE BYLAWS.

FORM 990, PART VI, SECTION A, LINE 7A:
MEMBERS ELECTING MEMBERS OF GOVERNING BODY
NOMINEES TO THE BOARD OF TRUSTEES MUST BE APPROVED BY THE MEMBERSHIP, BY A MAJORITY VOTE.

FORM 990, PART VI, SECTION A, LINE 7B:
DECISIONS REQUIRING APPROVAL BY MEMBERS
MEMBERS MUST APPROVE THE AMENDMENTS TO THE BYLAWS OF THE ORGANIZATION AND ANY MATERIAL CHANGES TO THE MISSION OF THE ORGANIZATION AND U.S. MEMBERS MUST APPROVE ANY CHANGES TO U.S. MEMBERSHIP DUES.

FORM 990, PART VI, SECTION B, LINE 11B:
REVIEW OF FORM 990 BY GOVERNING BODY
THE ORGANIZATION'S FORM 990 UNDERGOES A NUMBER OF INTERNAL AND EXTERNAL REVIEWS BEFORE IT IS FILED WITH THE IRS. THE RETURN IS PREPARED BY AN INDEPENDENT ACCOUNTING FIRM AND THEN REVIEWED BY THE ORGANIZATION'S EXECUTIVE VICE PRESIDENT & CFO, EXECUTIVE VICE PRESIDENT & CHIEF OF STAFF & ADMINISTRATION, AND BY THE AUDIT COMMITTEE OF THE BOARD. LASTLY, IT IS SENT TO ALL BOARD MEMBERS BEFORE IT IS FILED.

FORM 990, PART VI, SECTION B, LINE 12C:
CONFLICT OF INTEREST POLICY
THE ORGANIZATION'S CONFLICT-OF-INTEREST POLICY WAS REVISED AND APPROVED BY THE BOARD OF TRUSTEES AND IS ENFORCED BY THE CHIEF COMPLIANCE AND ETHICS OFFICER.

ANNUALLY BOARD MEMBERS, OFFICERS, SENIOR ADMINISTRATIVE PERSONNEL, AND KEY EMPLOYEES ARE REQUIRED TO FILE WITH THE CHIEF ETHICS AND COMPLIANCE OFFICER A CONFLICT-OF-INTEREST DECLARATION FORM. THE CHIEF ETHICS OFFICER USES THE INFORMATION TO ENSURE THAT ANY BOARD MEMBER WHO HAS A CONFLICT OF INTEREST IN ANY BUSINESS BEFORE THE BOARD IS RECUSED FROM PARTICIPATING IN THAT DECISION AND VOTE.

FORM 990, PART VI, SECTION B, LINE 15:
PROCESS TO ESTABLISH COMPENSATION OF TOP MANAGEMENT
THE EXECUTIVE COMPENSATION COMMITTEE ("THE COMMITTEE") OF THE BOARD OF TRUSTEES OF UNITED WAY WORLDWIDE ("UWW") IS RESPONSIBLE FOR OVERSIGHT OF COMPENSATION AND BENEFITS PROGRAMS FOR THE UWW CHIEF EXECUTIVE OFFICER AND OTHER EXECUTIVE LEVEL STAFF ("EXECUTIVES"), AND FOR ENSURING THAT THE COMPENSATION POLICIES OF UWW ARE CONSISTENT WITH AND IN SUPPORT OF THE ORGANIZATION'S MISSION, VALUES AND GOALS.

ON AN ANNUAL BASIS, THE COMMITTEE IS RESPONSIBLE FOR EVALUATING THE PERFORMANCE OF THE CEO AND RECOMMENDING TO THE FULL BOARD OF TRUSTEES FOR APPROVAL ANY ADJUSTMENTS TO THE CEO'S COMPENSATION AND BENEFITS, INCLUDING

Name of the organization: UNITED WAY WORLDWIDE

Employer identification number: 13-1635294

INCENTIVE 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 OR THE EXECUTIVES.

THE COMMITTEE ENGAGES A THIRD-PARTY CONSULTANT TO PROVIDE COMPENSATION DATA FROM COMPARABLE ORGANIZATIONS ON AT LEAST A BIENNIAL BASIS. THE COMMITTEE REVIEWS AND DISCUSSES THAT DATA BEFORE DETERMINING THE COMPENSATION OF THE CEO AND EXECUTIVES. SUCH DECISION IS DOCUMENTED CONTEMPORANEOUSLY BY THE COMMITTEE.

FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY OF FORM 990:
AL,AK,AR,AZ,CA,CO,CT,FL,GA,HI,IL,KS,KY,LA,ME,MD,MA,MI,MN,MS,MO,NH,NJ,NM,NV NY,NC,ND,OH,OK,OR,PA,RI,SC,TN,UT,VA,WA,WV,WI

FORM 990, PART VI, SECTION C, LINE 19:
REQUIRED DOCUMENTS AVAILABLE TO THE PUBLIC
THE ORGANIZATION'S GOVERNING DOCUMENTS, CODE OF ETHICS/CONFLICT OF INTEREST POLICY, AUDITED FINANCIAL STATEMENTS, AND FILED IRS FORM 990 ARE AVAILABLE ON ITS WEBSITE (WWW.UNITEDWAY.ORG).

FORM 990, PART IX, LINE 11G, OTHER FEES:

| | |
|---|---|
| CONSULTING: | |
| PROGRAM SERVICE EXPENSES | 8,772,717. |
| MANAGEMENT AND GENERAL EXPENSES | 1,339,816. |
| FUNDRAISING EXPENSES | 2,228,451. |
| TOTAL EXPENSES | 12,340,984. |
| CONTRACT AND TEMPORARY HELP: | |
| PROGRAM SERVICE EXPENSES | 1,003,853. |
| MANAGEMENT AND GENERAL EXPENSES | 379,376. |
| FUNDRAISING EXPENSES | 335,728. |
| TOTAL EXPENSES | 1,718,957. |
| OTHER PURCHASED SERVICES: | |
| PROGRAM SERVICE EXPENSES | 273,262. |
| MANAGEMENT AND GENERAL EXPENSES | 58,524. |
| FUNDRAISING EXPENSES | -255,606. |
| TOTAL EXPENSES | 76,180. |
| BANK SERVICE FEES: | |
| PROGRAM SERVICE EXPENSES | -14. |
| MANAGEMENT AND GENERAL EXPENSES | 235,517. |
| FUNDRAISING EXPENSES | 190. |
| TOTAL EXPENSES | 235,693. |
| TOTAL OTHER FEES ON FORM 990, PART IX, LINE 11G, COL A | 14,371,814. |

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:

| | |
|---|---|
| PENSION-RELATED CHANGE OTHER THAN NET PERIODIC PENSION COST | -337,545. |
| WRITEDOWN ON INVESTMENT | -5,387,758. |
| TOTAL TO FORM 990, PART XI, LINE 9 | -5,725,303. |

FORM 990, PART XII, LINE 2B:
AT THE TIME OF THE 990 EXTENDED DUE DATE, THE FINANCIAL STATEMENT AUDIT WAS NEARING COMPLETION BUT THE FINAL REPORT HAD NOT YET BEEN ISSUED.
THE ORGANIZATION WILL AMEND THIS FORM 990 TO INCLUDE THE AUDITED

Name of the organization
UNITED WAY WORLDWIDE

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FINANCIALS WHEN THEY ARE COMPLETED.

**SCHEDULE R (Form 990)**
(Rev. January 2025)
Department of the Treasury
Internal Revenue Service

# Related Organizations and Unrelated Partnerships

**Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.**
**Attach to Form 990.**
**Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

**Open to Public Inspection**

Name of the organization
UNITED WAY WORLDWIDE

**Employer identification number**
13-1635294

**Part I** **Identification of Disregarded Entities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

| (a) Name, address, and EIN (if applicable) of disregarded entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
|---|---|---|---|---|---|
| UNITED WAY DIGITAL HOLDINGS, LLC - 81-5211422, 701 N FAIRFAX STREET, ALEXANDRIA, VA 22314 | SOFTWARE | DELAWARE | 0. | 0. | UNITED WAY WORLDWIDE |
| | | | | | |
| | | | | | |
| | | | | | |

**Part II** **Identification of Related Tax-Exempt Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Exempt Code section | (e) Public charity status (if section 501(c)(3)) | (f) Direct controlling entity | (g) Section 512(b)(13) controlled entity? Yes | (g) No |
|---|---|---|---|---|---|---|---|
| UNITED WAY WORLDWIDE (ASIA) LIMITED ROOM 1901, 19/F, LEE GARDEN ON, 33 HYSAN AVE CAUSEWAY BAY, HONG KONG | SEE PART VII | HONG KONG | 501(C)(3) | LINE 7 | UNITED WAY WORLDWIDE | X | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |

**Part III** **Identification of Related Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Predominant income (related, unrelated, excluded from tax under sections 512-514) | (f) Share of total income | (g) Share of end-of-year assets | (h) Disproportionate allocations? Yes | (h) No | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (j) General or managing partner? Yes | (j) No | (k) Percentage ownership |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
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**Part IV** **Identification of Related Organizations Taxable as a Corporation or Trust.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Type of entity (C corp, S corp, or trust) | (f) Share of total income | (g) Share of end-of-year assets | (h) Percentage ownership | (i) Section 512(b)(13) controlled entity? Yes | (i) No |
|---|---|---|---|---|---|---|---|---|---|
| FRONTSTREAM HOLDINGS LLC - 38-3913855<br>11480 COMMERCE PARK DR, SUITE 300<br>RESTON, VA 20191-1575 | FUNDRAISING CAMPAIGN<br>PLEDGE PROCESSING | DE | N/A | C CORP | 0. | 0. | | | X |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

**Part V** **Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

| **Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule. | | Yes | No |
|---|---|---|---|
| **1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV? | | | |
| **a** Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity | 1a | | X |
| **b** Gift, grant, or capital contribution to related organization(s) | 1b | | X |
| **c** Gift, grant, or capital contribution from related organization(s) | 1c | | X |
| **d** Loans or loan guarantees to or for related organization(s) | 1d | | X |
| **e** Loans or loan guarantees by related organization(s) | 1e | | X |
| **f** Dividends from related organization(s) | 1f | | X |
| **g** Sale of assets to related organization(s) | 1g | | X |
| **h** Purchase of assets from related organization(s) | 1h | | X |
| **i** Exchange of assets with related organization(s) | 1i | | X |
| **j** Lease of facilities, equipment, or other assets to related organization(s) | 1j | | X |
| **k** Lease of facilities, equipment, or other assets from related organization(s) | 1k | | X |
| **l** Performance of services or membership or fundraising solicitations for related organization(s) | 1l | X | |
| **m** Performance of services or membership or fundraising solicitations by related organization(s) | 1m | X | |
| **n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) | 1n | X | |
| **o** Sharing of paid employees with related organization(s) | 1o | X | |
| **p** Reimbursement paid to related organization(s) for expenses | 1p | X | |
| **q** Reimbursement paid by related organization(s) for expenses | 1q | X | |
| **r** Other transfer of cash or property to related organization(s) | 1r | | X |
| **s** Other transfer of cash or property from related organization(s) | 1s | | X |

**2** If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

| | (a) Name of related organization | (b) Transaction type (a-s) | (c) Amount involved | (d) Method of determining amount involved |
|---|---|---|---|---|
| (1) | UNITED WAY WORLDWIDE (ASIA) LIMITED | P | 0. | COST |
| (2) | | | | |
| (3) | | | | |
| (4) | | | | |
| (5) | | | | |
| (6) | | | | |

**Part VI** **Unrelated Organizations Taxable as a Partnership.** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a) Name, address, and EIN of entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Predominant income (related, unrelated, excluded from tax under sections 512-514) | (e) Are all partners sec. 501(c)(3) orgs.? Yes | (e) No | (f) Share of total income | (g) Share of end-of-year assets | (h) Disproportionate allocations? Yes | (h) No | (i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065) | (j) General or managing partner? Yes | (j) NO | (k) Percentage ownership |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | |
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## Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R. See instructions.

SCHEDULE R, PART II, COLUMN (B):

UNITED WAY WORLDWIDE (ASIA) LIMITED'S PRIMARY ACTIVITY IS LEADERSHIP

AND SUPPORT FOR THE UWW NETWORK MEMBERS IN THE ASIA PACIFIC REGION.