Return of Organization Exempt From Income Tax

For the 2021 calendar year, or tax year beginning JUL 1, 2021 and ending JUN 30, 2022

B Check if applicable:

C Name of organization
UNITED WAY OF GREATER RICHMOND & PETERSBURG

D Employer identification number
23-7375346

E Telephone number
804-771-5820

G Gross receipts $ 22,685,809

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

H(b) Are all subordinates included? Yes ☑ No ☐

F Name and address of principal officer: ANGELA OTTO
SAME AS C ABOVE

J Website: WWW.YOURUNITEDWAY.ORG

K Form of organization: X Corporation ☐ Trust ☐ Association ☐ Other ☐

L Year of formation: 1911 ☐ State of legal domicile: VA ☐

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

Part I
Summary

1 Briefly describe the organization's mission or most significant activities: WE BELIEVE THAT EVERY INDIVIDUAL, PARTICULARLY THOSE WHO FACE LONGSTANDING DISADVANTAGES,

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 19

4 Number of independent voting members of the governing body (Part VI, line 1b) 4 19

5 Total number of individuals employed in calendar year 2021 (Part V, line 2a) 5 47

6 Total number of volunteers (estimate if necessary) 6 1,500

7a Total unrelated business revenue from Part VIII, column (C), line 12 0...

7b Net unrelated business taxable income from Form 990-T, Part I, line 11 0...

8 Contributions and grants (Part VIII, line 1h) 24,234,241 21,100,474

9 Program service revenue (Part VIII, line 2g) 0 0

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d) 326,761 640,527

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) 536,915 925,994

12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) 25,097,917 22,666,995

13 Grants and similar amounts paid (Part IX, column (A), lines 1-3) 17,830,153 18,435,484

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) 2,882,033 2,630,211

16a Professional fundraising fee (Part IX, column (A), line 11e) 0 0

16b Total fundraising expenses (Part IX, column (D), line 25) 1,417,234

17 Other expenses (Part IX, column (A), lines 11a-11d, 11f-24a) 2,177,265 1,726,154

18 Total expenses. Add lines 11-17 (must equal Part IX, column (A), line 25) 22,889,451 22,791,849

19 Revenue less expenses, Subtract line 18 from line 12 2,208,466 -124,854

20 Total assets (Part X, line 16) 22,084,663 16,886,120

21 Total liabilities (Part X, line 26) 12,634,410 8,996,441

22 Net assets or fund balances. Subtract line 21 from line 20 9,450,253 7,889,679

Part II
Signature Block

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

Signature of Officer
ANGELA OTTO, INTERIM CHIEF EXECUTIVE OFFICER

Date 1/21/2022

Type or print name and title

Print/Type preparer’s name
JAYME MIKA

Preparer’s signature

Date

Check ☐ if self-employed
PTIN 00852731

Preparer Firm’s name KEITER, STEPHENS, HURST, GARY & SHREAVES

Firm’s EIN 54-1631262

Use Only

Firm’s address 4401 DOMINION BLVD

GLEN ALLEN, VA 23060

Phone no. (804) 747-0000

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

Firm’s address for Paperwork Reduction Act Notice, see the separate instructions.

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Form 990 (2021)
1 Briefly describe the organization's mission:
WE BELIEVE THAT EVERY INDIVIDUAL, PARTICULARLY THOSE WHO FACE LONSTANDING DISADVANTAGES, DESERVES TO BE SUPPORTED ALONG THE PATH TO SUCCESS.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? No

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? No

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 $ 18,435,484. Including grants of $ 18,435,484.) (Revenue $ )
UNITED WAY OF GREATER RICHMOND & PETERSBURG BUILDS COLLABORATIVE SOLUTIONS AND CREATES STRONG ALLIANCES THAT CAN MAKE AN IMPACT TODAY AND IN THE YEARS TO COME. UNITED WAY SERVES THE REGION'S NEIGHBORHOODS AND RURAL AREAS ALIKE, PROVIDING DIRECT SERVICES AND SUPPORTING PARTNERS IN THE CITIES OF RICHMOND, PETERSBURG AND COLONIAL HEIGHTS AS WELL AS THE COUNTIES OF CHARLES CITY, CHESTERFIELD, DINWIDDIE, GOOCHLAND, HANOVER, HENRICO, NEW KENT AND POWHATAN—11 DIFFERENT LOCALITIES IN ALL.

UNITED WAY OF GREATER RICHMOND AND PETERSBURG IS ONE OF THE LARGEST NONPROFIT FUNDING ORGANIZATIONS IN THE REGION, INVESTING IN NONPROFIT AGENCIES IN COMMUNITIES THROUGHOUT OUR SERVICE AREA. WE FUND PROGRAMS

4b (Code: __________) (Expenses $ 2,241,827. Including grants of $ ) (Revenue $ )
UNITED WAY OF GREATER RICHMOND & PETERSBURG UNDERSTANDS THE EVOLVING NEEDS OF COMMUNITIES IN OUR REGION. WE BRING TOGETHER GOVERNMENT AGENCIES, OTHER NONPROFITS, RELIGIOUS ORGANIZATIONS, SCHOOLS, BUSINESSES AND COMMUNITY MEMBERS TO CREATE COMMUNITY-WIDE SOLUTIONS THAT ELIMINATE THE ROOT CAUSES OF THESE PROBLEMS. WE RUN DEDICATED PROGRAMS, IDENTIFY GAPS OF SERVICE, AND CONNECT INDIVIDUALS WITH KNOWLEDGE AND RESOURCES -- ALL OF WHICH HAS A POSITIVE IMPACT ON THE LIVES OF PEOPLE IN THE COMMUNITY AS WELL AS THE LIVES OF THEIR FAMILY MEMBERS, FRIENDS AND NEIGHBORS.

4c (Expenses $ Including grants of $ ) (Revenue $ )
IN ADDITION TO THE PROGRAMS WE LEAD AND OUR COMMUNITY INVESTMENTS, WE BRING MEMBERS OF THE COMMUNITY TOGETHER TO VOLUNTEER AND JOIN US IN PROVIDING REAL HELP TO PEOPLE IN NEED. UNITED WAY STRONGLY BELIEVES THAT THE SOCIAL RELATIONSHIPS INTRINSIC TO VOLUNTEER WORK ARE CRITICAL TO INDIVIDUAL AND COMMUNITY WELL-BEING. THE ETHOS OF VOLUNTEERISM IS INFUSED WITH VALUES SUCH AS SOLIDARITY, RECIPROCITY, MUTUAL TRUST, BELONGING AND EMPOWERMENT, ALL OF WHICH CONTRIBUTE SIGNIFICANTLY TO QUALITY OF LIFE OF THE PEOPLE IN OUR REGION.

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

4e Total program service expenses $ 20,677,311.
<table>
<thead>
<tr>
<th>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?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>If &quot;Yes,&quot; complete Schedule C, Part II</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

| Is the organization required to complete Schedule B, Schedule of Contributors? See instructions |  

| 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 |  

| 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 |  

| 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 |  

| Did the organization maintain collections of works of art, historical treasures, or other similar assets? |  

| If "Yes," complete Schedule D, Part III |  

| 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 |  

| 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 |  

| 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. |  

| Did the organization report an amount for land, buildings, and equipment in Part X, line 10? |  

| If "Yes," complete Schedule D, Part VI |  

| 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 |  

| 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 |  

| 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 |  

| Did the organization report an amount for other liabilities in Part X, line 25? |  

| If "Yes," complete Schedule D, Part X |  

| 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 |  

| Did the organization obtain separate, independent audited financial statements for the tax year? |  

| If "Yes," complete Schedule D, Parts XI and XII |  

| Was the organization included in consolidated, independent audited financial statements for the tax year? |  

| If "Yes," and if the organization answered "No" to line 12b, then completing Schedule D, Parts XI and XII is optional |  

| Is the organization a school described in section 170(b)(1)(A)(ii)? |  

| If "Yes," complete Schedule E |  

| Did the organization maintain an office, employees, or agents outside of the United States? |  

| If "Yes," complete Schedule F, Parts I and IV |  

| 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 |  

| 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 |  

| 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 |  

| 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 11? |  

| If "Yes," complete Schedule G, Part I. See instructions |  

| Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1o and 1a? |  

| If "Yes," complete Schedule G, Part I |  

| 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 |  

| Did the organization operate one or more hospital facilities? |  

| If "Yes," complete Schedule H |  

| Did the organization operate more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 12? |  

| If "Yes," complete Schedule I, Parts I and II |
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  

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  

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  

24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?  

24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?  

24d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?  

25a Section 501(c)(3), 501(c)(4), and 501(c)(20) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year?  If "Yes," complete Schedule L, Part I  

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  

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  

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  

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  

b A family member of any individual described in line 28a?  If "Yes," complete Schedule L, Part IV  

29 Did the organization receive more than $25,000 in non-cash contributions?  If "Yes," complete Schedule M  

30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions?  If "Yes," complete Schedule M  

31 Did the organization liquidate, terminate, or dissolve and cease operations?  If "Yes," complete Schedule N, Part I  

32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets?  If "Yes," complete Schedule N, Part II  

33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-3 and 301.7701-3T?  If "Yes," complete Schedule R, Part I  

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  

35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?  

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)?  

36 Section 501(c)(9) organizations. Did the organization make any transfers to an exempt non-charitable related organization?  If "Yes," complete Schedule R, Part V, line 2  

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  

38 Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 197?  

Note: All Form 990 filers are required to complete Schedule O  

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  

1a Enter the number reported in box 3 of Form 1098. Enter 0 if not applicable  

1b Enter the number of Forms W-2G included on line 1a. Enter 0 if not applicable  

1c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?
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.  
2b If at least one is reported on line 2a, did the organization file all required federal employment tax returns? 
Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.  
3a Did the organization have unrelated business gross income of $1,000 or more during the year?  
3b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3a, provide an explanation on Schedule O  
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)?  
4b If "Yes," enter the name of the foreign country. 
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  
5b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?  
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?  
6b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?  
7 Organizations that may receive deductible contributions under section 170(c).  
7a 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?  
7b If "Yes," did the organization notify the donor of the value of the goods or services provided?  
7c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?  
7d If "Yes," indicate the number of Forms 8282 filed during the year.  
7e Did the organization receive any 'under' directly or indirectly, to pay premiums on a personal benefit contract?  
7f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  
7g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?  
7h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?  
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?  
9 Sponsoring organizations maintaining donor advised funds.  
9a Did the sponsoring organization make any taxable distributions under section 4966?  
9b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?  
10 Section 501(c)(7) organizations. Enter:  
10a Initiation fees and capital contributions included on Part VIII, line 12  
10b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  
11 Section 501(c)(12) organizations. Enter:  
11a Gross income from members or shareholders  
11b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them)  
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?  
12b If "Yes," enter the amount of tax-exempt interest received or accrued during the year  
13 Section 501(c)(29) qualified nonprofit health insurance issuers.  
13a Is the organization licensed to issue qualified health plans in more than one state?  
Note: See the instructions for additional information the organization must report on Schedule O.  
13b 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  
13c Enter the amount of reserves on hand  
14a Did the organization receive any payments for indoor tanning services during the tax year?  
14b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O  
15 Is the organization subject to the section 4966 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?  
If "Yes," see the instructions and file Form 4720, Schedule N.  
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?  
16a If "Yes," complete Form 4720, Schedule O.  
17 Section 501(c)(3) organizations. Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4965, 4952 or 4953?  
17a If "Yes," complete Form 990-T.
### Section A. Governing Body and Management

1a Enter the number of voting members of the governing body at the end of the tax year: 19

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? **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? **X**

4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? **X**

5 Did the organization become aware during the year of a significant diversion of the organization's assets? **X**

6 Did the organization have members or stockholders? **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? **X**

7b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? **X**

8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:
   a. The governing body? **X**
   b. Each committee with authority to act on behalf of the governing body? **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? **X**

### Section B. Policies

10a Did the organization have local chapters, branches, or affiliates? **X**

11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? **X**

12a Did the organization have a written conflict of interest policy? **X**

12b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? **X**

13 Did the organization have a written whistleblower policy? **X**

14 Did the organization have a written document retention and destruction policy? **X**

15 Did the organization consider making available to participants in any compensation plan, comparability data, and contemporaneous substantiation of the deliberation and decision? **X**

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? **X**

16b 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? **X**

### Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed: **NONE**

18 Section 6104 requires an organization to make its Forms 1023 and 1024-A (if applicable), 990, and 990-T (section 501(c)(3) only) available for public inspection. Indicate how you made these available. Check all that apply.
   - [ ] Own website
   - [ ] Another's website
   - [ ] 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:

   **ANGELA OTTO** - **(804) 771-5820**

   **7814 CAROUSEL LANE, SUITE 400, RICHMOND, VA 23294**
## Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

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

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

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) James L. M. Taylor</td>
<td>40.00</td>
<td>X</td>
<td>177,451</td>
<td>0.0</td>
<td>10,758</td>
</tr>
<tr>
<td>(2) Angela Otto</td>
<td>40.00</td>
<td>X</td>
<td>104,074</td>
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</tr>
<tr>
<td>(3) Brian Wachiru</td>
<td>40.00</td>
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<td>102,500</td>
<td>0.0</td>
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<td>(4) Audrey Trussell</td>
<td>40.00</td>
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<td>94,627</td>
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<td>4,936</td>
</tr>
<tr>
<td>(5) Daniel Khars</td>
<td>40.00</td>
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<td>70,434</td>
<td>0.0</td>
<td>2,461</td>
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<tr>
<td>(6) Philip Avent</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
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<tr>
<td>(7) Cindy Buckner</td>
<td>1.00</td>
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<tr>
<td>(8) Theresa Chambley</td>
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<td>0.0</td>
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<td>0.0</td>
</tr>
<tr>
<td>(9) Larry Cottrill</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
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<tr>
<td>(10) Bobby Cowgill</td>
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<tr>
<td>(11) Donna Craver</td>
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<tr>
<td>(12) Danielle Fitz-Hugh</td>
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</tr>
<tr>
<td>(13) Tammy Hornsby-Fink</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>(14) Jackie Larkin</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>(15) Del Lifschitz</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>(16) Ashante Smith</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>(17) Kelly Till</td>
<td>1.00</td>
<td>X</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>(A) Name and title</td>
<td>(B) Position (do not check more than one box, unless person is both an officer and a director/trustee)</td>
<td>(C) Average hours per week (list any hours for related organizations below line)</td>
<td>(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)</td>
<td>(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)</td>
<td>(F) Estimated amount of other compensation from the organization and related organizations</td>
</tr>
<tr>
<td>-------------------</td>
<td>------------------------------------------</td>
<td>-------------------------------</td>
<td>----------------------------------</td>
<td>----------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>(18) SUSAN TRIGGS</td>
<td>DIRECTOR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(19) LYNN WHITE</td>
<td>DIRECTOR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(20) JAMES J.L. STEGMAN</td>
<td>INTERMEDIATE PAST CHAIR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(21) JONATHAN LEON</td>
<td>CHAIR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(22) CORYNNE ARRITT</td>
<td>FIRST VICE CHAIR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(23) LAKSHMI ALGAPPAN</td>
<td>SECOND VICE CHAIR</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>(24) PETER PERKINS</td>
<td>TREASURER</td>
<td>1.00</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
</tr>
</tbody>
</table>

1b Subtotal                                    | 549,086 | 0. | 0. | 28,027 |

c Total from continuation sheets to Part VII, Section A | 0. | 0. | 0. |
d Total (add lines 1b and 1c) | 549,086 | 0. | 0. | 28,027 |

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

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

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

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

Section B. Independent Contractors

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

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
</table>

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization | 0 |
### United Way of Greater Richmond & Petersburg

#### Part VIII Statement of Revenue

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

#### Contributions, Gifts, Grants and Other Similar Amounts

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 a</strong> Federated campaigns</td>
<td>1a 25,835</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 b</strong> Membership dues</td>
<td>1b</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 c</strong> Fundraising events</td>
<td>1c</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 d</strong> Related organizations</td>
<td>1d</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 e</strong> Government grants (contributions)</td>
<td>1e 646,778</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 f</strong> All other contributions, gifts, grants, and similar amounts not included above</td>
<td>1f 20,127,861</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 g</strong> Noncash contributions included in lines 1a-1f</td>
<td>1g $151,061</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1 h</strong> Total, Add lines 1a-1f</td>
<td>21,160,474</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Program Service Revenue

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2 a</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 b</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 c</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 d</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 e</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 f</strong> All other program service revenue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>2 g</strong> Total, Add lines 2a-2f</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Investment Income

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>3</strong> Investment income (including dividends, interest, and other similar amounts)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>4</strong> Income from investment of tax-exempt bond proceeds</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>5</strong> Royalties</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Gross Rents

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>6 a</strong> Gross rents</td>
<td>6a</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6 b</strong> Less: rental expenses</td>
<td>6b</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6 c</strong> Rental income or (loss)</td>
<td>6c</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>6 d</strong> Net rental income or (loss)</td>
<td>6d</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Gross Amount from Sales of Assets Other Than Inventory

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7 a</strong> Gross amount from sales of assets other than inventory</td>
<td>7a 534,998</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7 b</strong> Less: cost or other basis and sales expenses</td>
<td>7b 18,814</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7 c</strong> Gain or (loss)</td>
<td>7c 516,184</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>7 d</strong> Net gain or (loss)</td>
<td>7d</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Gross Income from Fundraising Events (not including $ of contributions reported on line 1c).

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>8 a</strong> Gross income from fundraising events</td>
<td>8a</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>8 b</strong> Less: direct expenses</td>
<td>8b</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>8 c</strong> Net income or (loss) from fundraising events</td>
<td>8c</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Gross Income from Gaming Activities

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>9 a</strong> Gross income from gaming activities</td>
<td>9a</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>9 b</strong> Less: direct expenses</td>
<td>9b</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>9 c</strong> Net income or (loss) from gaming activities</td>
<td>9c</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Gross Sales of Inventory, Less Returns and Allowances

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>10 a</strong> Gross sales of inventory, less returns and allowances</td>
<td>10a</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>10 b</strong> Less: cost of goods sold</td>
<td>10b</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>10 c</strong> Net income or (loss) from sales of inventory</td>
<td>10c</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Miscellaneous Revenue

<table>
<thead>
<tr>
<th>(A) Total Revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>11 a</strong> Fees - 3rd Party Proc.</td>
<td>11a 591,096</td>
<td>591,096</td>
<td></td>
</tr>
<tr>
<td><strong>11 b</strong> Endowment Income</td>
<td>11b 244,067</td>
<td>244,067</td>
<td></td>
</tr>
<tr>
<td><strong>11 c</strong> Fees - Donor Designations</td>
<td>11c 69,974</td>
<td>69,974</td>
<td></td>
</tr>
<tr>
<td><strong>11 d</strong> All other revenue</td>
<td>11d 20,857</td>
<td>20,857</td>
<td></td>
</tr>
<tr>
<td><strong>12</strong> Total, Add lines 11a-11d</td>
<td>12 $925,994</td>
<td>925,994</td>
<td>8,640,527</td>
</tr>
</tbody>
</table>

---

**Form 990 (2021)**

**Page 9**

**United Way of Greater Richmond & Petersburg**

**23-7375346**

**Part VIII Statement of Revenue**

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

**Contributions, Gifts, Grants and Other Similar Amounts**

- **1 a** Federated campaigns 1a 25,835
- **1 b** Membership dues 1b
- **1 c** Fundraising events 1c
- **1 d** Related organizations 1d
- **1 e** Government grants (contributions) 1e 646,778
- **1 f** All other contributions, gifts, grants, and similar amounts not included above 1f 20,127,861
- **1 g** Noncash contributions included in lines 1a-1f 1g $151,061
- **1 h** Total, Add lines 1a-1f 21,160,474

**Program Service Revenue**

- **2** Investment income (including dividends, interest, and other similar amounts)
- **3** Income from investment of tax-exempt bond proceeds
- **5** Royalties

**Gross Rents**

- **6 a** Gross rents 6a
- **6 b** Less: rental expenses 6b
- **6 c** Rental income or (loss) 6c
- **6 d** Net rental income or (loss) 6d

**Gross Amount from Sales of Assets Other Than Inventory**

- **7 a** Gross amount from sales of assets other than inventory 7a 534,998
- **7 b** Less: cost or other basis and sales expenses 7b 18,814
- **7 c** Gain or (loss) 7c 516,184
- **7 d** Net gain or (loss) 7d

**Gross Income from Fundraising Events (not including $ of contributions reported on line 1c). See Part IV, line 18**

- **8 a** Gross income from fundraising events 8a
- **8 b** Less: direct expenses 8b
- **8 c** Net income or (loss) from fundraising events 8c

**Gross Income from Gaming Activities**

- **9 a** Gross income from gaming activities 9a
- **9 b** Less: direct expenses 9b
- **9 c** Net income or (loss) from gaming activities 9c

**Gross Sales of Inventory, Less Returns and Allowances**

- **10 a** Gross sales of inventory, less returns and allowances 10a
- **10 b** Less: cost of goods sold 10b
- **10 c** Net income or (loss) from sales of inventory 10c

**Miscellaneous Revenue**

- **11 a** Fees - 3rd Party Proc. 11a 591,096
- **11 b** Endowment Income 11b 244,067
- **11 c** Fees - Donor Designations 11c 69,974
- **11 d** All other revenue 11d 20,857
- **12** Total, Add lines 11a-11d 12 $925,994

**Total Revenue, See instructions** 22,666,995

---

**Form 990 (2021)**

15481213 759400 707775.000

2021.05010 UNITED WAY OF GREATER RICH 707775.1
<table>
<thead>
<tr>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>18,435,484</td>
<td>18,435,484</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Grants and other assistance to domestic individuals. See Part IV, line 22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 Compensation paid to or for members</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Compensation not included above to disqualified persons (as defined under section 4947(a)(1)) and persons described in section 4947(a)(3)(B)</td>
<td>577,115</td>
<td>126,816</td>
<td>175,863</td>
</tr>
<tr>
<td>7 Other salaries and wages</td>
<td>1,395,443</td>
<td>830,338</td>
<td>185,770</td>
</tr>
<tr>
<td>8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)</td>
<td>193,117</td>
<td>95,593</td>
<td>38,945</td>
</tr>
<tr>
<td>9 Other employee benefits</td>
<td>333,547</td>
<td>174,095</td>
<td>46,628</td>
</tr>
<tr>
<td>10 Payroll taxes</td>
<td>130,989</td>
<td>60,167</td>
<td>24,601</td>
</tr>
<tr>
<td>11 Fees for services (nonemployees):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Management</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Legal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c Accounting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d Lobbying</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e Professional fundraising services. See Part IV, line 17</td>
<td>35,290</td>
<td>35,290</td>
<td></td>
</tr>
<tr>
<td>f Investment management fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g Other. (If line 11g amount exceeds 5% of line 25, column (A), amount, list line 11g expenses on Sch 0.)</td>
<td>445,557</td>
<td>171,700</td>
<td>49,346</td>
</tr>
<tr>
<td>12 Advertising and promotion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Office expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14 Information technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Royalties</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16 Occupancy</td>
<td>194,160</td>
<td>105,443</td>
<td>24,102</td>
</tr>
<tr>
<td>17 Travel</td>
<td>7,958</td>
<td>3,497</td>
<td>260</td>
</tr>
<tr>
<td>18 Payments of travel or entertainment expenses for any federal, state, or local public officials</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19 Conferences, conventions, and meetings</td>
<td>11,587</td>
<td>6,612</td>
<td>2,227</td>
</tr>
<tr>
<td>20 Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21 Payments to affiliates</td>
<td>294,828</td>
<td>145,940</td>
<td>59,457</td>
</tr>
<tr>
<td>22 Depreciation, depletion, and amortization</td>
<td>47,563</td>
<td>23,544</td>
<td>9,592</td>
</tr>
<tr>
<td>23 Insurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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 0.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a PROGRAM EXPENSES</td>
<td>407,096</td>
<td>407,096</td>
<td></td>
</tr>
<tr>
<td>b EQUIPMENT MAINTENANCE</td>
<td>136,580</td>
<td>65,485</td>
<td>28,391</td>
</tr>
<tr>
<td>c PRINTING AND PUBLICATIO</td>
<td>94,046</td>
<td>4,077</td>
<td>300</td>
</tr>
<tr>
<td>d SUPPLIES</td>
<td>22,997</td>
<td>14,332</td>
<td>2,303</td>
</tr>
<tr>
<td>e All other expenses</td>
<td>28,492</td>
<td>7,092</td>
<td>14,229</td>
</tr>
<tr>
<td>25 Total functional expenses. Add lines 1 through 24e</td>
<td>22,791,849</td>
<td>20,677,311</td>
<td>697,304</td>
</tr>
<tr>
<td>26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## UNITED WAY OF GREATER RICHMOND

### Part X Balance Sheet

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

<table>
<thead>
<tr>
<th></th>
<th>(A) Beginning of year</th>
<th>(B) End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash - non-interest-bearing</td>
<td>10,206,508</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>1,416,535</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>70,476</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>29,890</td>
</tr>
<tr>
<td>5</td>
<td>Land, buildings, and equipment: cost or other basis</td>
<td>510,881</td>
</tr>
<tr>
<td>6</td>
<td>Less: accumulated depreciation</td>
<td>346,814</td>
</tr>
<tr>
<td>7</td>
<td>Investments - publicly traded securities</td>
<td>5,128,910</td>
</tr>
<tr>
<td>8</td>
<td>Investments - other securities</td>
<td>5,007,490</td>
</tr>
<tr>
<td>9</td>
<td>Intangible assets</td>
<td>16,711</td>
</tr>
<tr>
<td>10</td>
<td>Other assets</td>
<td>22,084,663</td>
</tr>
<tr>
<td>11</td>
<td>Accounts payable and accrued expenses</td>
<td>196,773</td>
</tr>
<tr>
<td>12</td>
<td>Grants payable</td>
<td>11,550,188</td>
</tr>
<tr>
<td>13</td>
<td>Deferred revenue</td>
<td>387,447</td>
</tr>
<tr>
<td>14</td>
<td>Tax-exempt bond liabilities</td>
<td>500,002</td>
</tr>
<tr>
<td>15</td>
<td>Loans and other payables to 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</td>
<td>8,067,001</td>
</tr>
<tr>
<td>16</td>
<td>Organizations that follow FASB ASC 956, check here X</td>
<td>1,383,252</td>
</tr>
<tr>
<td>17</td>
<td>Net assets without donor restrictions</td>
<td>9,450,253</td>
</tr>
<tr>
<td>18</td>
<td>Net assets with donor restrictions</td>
<td>22,084,663</td>
</tr>
</tbody>
</table>

Form 990 (2021)
### Part XI Reconciliation of Net Assets

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

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VII, column (A), line 12)</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part X, column (A), line 25)</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain on Schedule C)</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))</td>
</tr>
</tbody>
</table>

### Part XII Financial Statements and Reporting

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Yes</td>
<td>X</td>
</tr>
<tr>
<td>2b</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3b</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Form 990 (2021)
Public Charity Status and Public Support

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

Attach to Form 990 or Form 990-EZ.

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

Name of the organization: UNITED WAY OF GREATER RICHMOND & PETERSBURG

Employer identification number: 23-7375346

<table>
<thead>
<tr>
<th>Part I</th>
<th>Reason for Public Charity Status. (All organizations must complete this part.) See instructions.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>☐ A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).</td>
</tr>
<tr>
<td>2</td>
<td>☐ A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990).)</td>
</tr>
<tr>
<td>3</td>
<td>☐ A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).</td>
</tr>
<tr>
<td>4</td>
<td>☐ 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:</td>
</tr>
<tr>
<td>5</td>
<td>☐ 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.)</td>
</tr>
<tr>
<td>6</td>
<td>☐ A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).</td>
</tr>
<tr>
<td>7</td>
<td>☒ 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.)</td>
</tr>
<tr>
<td>8</td>
<td>☐ A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)</td>
</tr>
<tr>
<td>9</td>
<td>☐ 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:</td>
</tr>
<tr>
<td>10</td>
<td>☐ 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.)</td>
</tr>
<tr>
<td>11</td>
<td>☐ An organization organized and operated exclusively to test for public safety. See section 509(a)(4).</td>
</tr>
<tr>
<td>12</td>
<td>☒ 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 12a, 12f, and 12g.</td>
</tr>
<tr>
<td></td>
<td>☐ 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.</td>
</tr>
<tr>
<td></td>
<td>☐ 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.</td>
</tr>
<tr>
<td></td>
<td>☒ 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.</td>
</tr>
<tr>
<td></td>
<td>☐ 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.</td>
</tr>
<tr>
<td></td>
<td>☐ 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.</td>
</tr>
<tr>
<td></td>
<td>☐ Enter the number of supported organizations.</td>
</tr>
</tbody>
</table>

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.
**Section A. Public Support**

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2017</th>
<th>(b) 2018</th>
<th>(c) 2019</th>
<th>(d) 2020</th>
<th>(e) 2021</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and</td>
<td>17762911</td>
<td>16615740</td>
<td>16156621</td>
<td>24234241</td>
<td>21100474</td>
<td>95869987</td>
</tr>
<tr>
<td>membership fees received. (Do not</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>include any &quot;usual grants.&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Tax revenues levied for the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>organization’s benefit and either paid to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 The value of services or facilities</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>furnished by a governmental unit to</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Total. Add lines 1 through 3</td>
<td>17762911</td>
<td>16615740</td>
<td>16156621</td>
<td>24234241</td>
<td>21100474</td>
<td>95869987</td>
</tr>
<tr>
<td>5 The portion of total contributions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>by each person (other than a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>governmental unit or publicly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>supported organization) included on line</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 that exceeds 2% of the amount shown on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>line 11, column (f)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Public support. Subtract line 5 from line 4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

95869987.

**Section B. Total Support**

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2017</th>
<th>(b) 2018</th>
<th>(c) 2019</th>
<th>(d) 2020</th>
<th>(e) 2021</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Amounts from line 4</td>
<td>17762911</td>
<td>16615740</td>
<td>16156621</td>
<td>24234241</td>
<td>21100474</td>
<td>95869987</td>
</tr>
<tr>
<td>8 Gross income from interest,</td>
<td>106,818</td>
<td>120,071</td>
<td>79,997</td>
<td>90,378</td>
<td>124,343</td>
<td>521,607</td>
</tr>
<tr>
<td>dividends, payments received on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>securities loans, rents, royalties,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9 Net income from unrelated business</td>
<td>495,285</td>
<td>459,416</td>
<td>483,581</td>
<td>536,915</td>
<td>925,994</td>
<td>290191</td>
</tr>
<tr>
<td>activities, whether or not the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 Other income. Do not include gain or</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>loss from the sale of capital</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>assets (Explain in Part VI)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Total support. Add lines 7 through 10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>9292785</td>
</tr>
<tr>
<td>12 Gross receipts from related activities,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>etc. (see instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 First 5 years. If the Form 990 is for</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>the organization’s first, second, third,</td>
<td></td>
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</tr>
<tr>
<td>fourth, or fifth tax year as a section 501(c)(3)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>organization, check this box and stop here</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9292785.

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

<table>
<thead>
<tr>
<th></th>
<th>(a) 2017</th>
<th>(b) 2018</th>
<th>(c) 2019</th>
<th>(d) 2020</th>
<th>(e) 2021</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Public support percentage for 2021</td>
<td>96.55 %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>line 6, column (f), divided by line 11,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>column (f)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Public support percentage from 2020</td>
<td>96.48 %</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule A, Part II, line 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16a 33 1/3% support test - 2021. If the</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>organization did not check the box on line</td>
<td></td>
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</tr>
<tr>
<td>13, and line 14 is 33 1/3% or more, check</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>this box and stop here. The organization</td>
<td></td>
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</tr>
<tr>
<td>qualifies as a publicly supported</td>
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<tr>
<td>organization.</td>
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<tr>
<td>16b 33 1/3% support test - 2020. If the</td>
<td></td>
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<tr>
<td>organization did not check a box on line</td>
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</tr>
<tr>
<td>13 or 16a, and line 15 is 33 1/3% or more,</td>
<td></td>
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<tr>
<td>check this box and stop here. The</td>
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<tr>
<td>organization qualifies as a publicly</td>
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<tr>
<td>supported organization</td>
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<tr>
<td>17a 10% -facts-and-circumstances test -</td>
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<tr>
<td>2021. If the organization did not check a</td>
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<tr>
<td>box on line 13, 16a, or 16b, and line 14 is</td>
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</tr>
<tr>
<td>10% or more, and if the organization meets</td>
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<tr>
<td>the facts-and-circumstances test, check</td>
<td></td>
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</tr>
<tr>
<td>this box and stop here. Explain in Part VI</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>how the organization meets the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>facts-and-circumstances test. The</td>
<td></td>
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</tr>
<tr>
<td>organization qualifies as a publicly</td>
<td></td>
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</tr>
<tr>
<td>supported organization</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>17b 10% -facts-and-circumstances test -</td>
<td></td>
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</tr>
<tr>
<td>2020. If the organization did not check a</td>
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<td></td>
</tr>
<tr>
<td>box on line 13, 16a, 16b, or 17a, and line</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 is 10% or more, and if the organization</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>meets the facts-and-circumstances test,</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>check this box and stop here. Explain in</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Part VI how the organization meets the</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>facts-and-circumstances test. The</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>organization qualifies as a publicly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18 Private foundation. If the organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>did not check a box on line 13, 16a, 16b,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17a, or 17b, check this box and see</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>instructions.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Section A. Public Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2017</th>
<th>(b) 2018</th>
<th>(c) 2019</th>
<th>(d) 2020</th>
<th>(e) 2021</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Gross receipts from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Total. Add lines 1 through 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7a Amounts included on lines 1, 2, and 3 received from disqualified persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7c Add lines 7a and 7b</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Public support. (Exhibit I is from line 6)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2017</th>
<th>(b) 2018</th>
<th>(c) 2019</th>
<th>(d) 2020</th>
<th>(e) 2021</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 Amounts from line 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10c Add lines 10a and 10b</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12 Other Income. Do not include gain or loss from the sale of capital assets (Explain in Part VI)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 Total support. (Add lines 9, 10a, 10b, 11 and 12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Section C. Computation of Public Support Percentage

15 Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f)) 15 %

## Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f)) 17 %

18 Investment income percentage from 2020 Schedule A, Part III, line 17 18 %

19a 33 1/3% support tests - 2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

19b 33 1/3% support tests - 2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions
Section A. All Supporting Organizations

1. Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.

2. Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).

3a. Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.

b. Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in Part VI when and how the organization made the determination.

3c. Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.

4a. Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.

b. Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.

4c. Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.

5a. Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).

b. Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?

c. Substitutions only. Was the substitution the result of an event beyond the organization's control?

6. Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.

7. Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (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).

8. Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? If "Yes," complete Part I of Schedule L (Form 990).

9a. Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in Part VI.

b. Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in Part VI.

c. Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.

10a. Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type I supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.

b. Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)
### Part IV: Supporting Organizations (continued)

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 Has the organization accepted a gift or contribution from any of the following persons?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body or a supported organization?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b A family member of a person described on line 11a above?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c A 35% controlled entity of a person described on line 11a or 11b above?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Section B: Type I Supporting Organizations**

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

**Section C: Type II Supporting Organizations**

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

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Check the box next to the method that the organization used to satisfy the Integral Test during the year (see instructions).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a The organization satisfied the Activities Test. Complete line 2 below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b The organization is the parent of each of its supported organizations. Complete line 3 below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Activities Test. Answer lines 2a and 2b below.**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>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?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Parent of Supported Organizations. Answer lines 3a and 3b below.**

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

13/00 01-04-22 Schedule A (Form 990) 2021

15481213 759400 707775.000 2021.05010 UNITED WAY OF GREATER RICHMOND 707775.1
**United Way of Greater Richmond & Petersburg**

**Schedule A (Form 990) 2021**

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

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

### Section A - Adjusted Net Income

<table>
<thead>
<tr>
<th></th>
<th>(A) Prior Year</th>
<th>(B) Current Year (optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Net short-term capital gain</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2. Recoveries of prior-year distributions</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3. Other gross income (see instructions)</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4. Add lines 1 through 3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5. Depreciation and depletion</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6. Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7. Other expenses (see instructions)</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8. <strong>Adjusted Net Income</strong> (subtract lines 5, 6, and 7 from line 4)</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

### Section B - Minimum Asset Amount

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

### Section C - Distributable Amount

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).**

---

**Schedule A (Form 990) 2021**

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**15481213 759400 707775.000**

**2021.05010 UNITED WAY OF GREATER RIC 707775.1**
### Part V  Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

#### Section D - Distributions

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

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

<table>
<thead>
<tr>
<th></th>
<th>(i) Excess Distributions</th>
<th>(ii) Underdistributions Pre-2021</th>
<th>(iii) Distributable Amount for 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Distributable amount for 2021 from Section C, line 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Underdistributions, if any, for years prior to 2021 (reasonable cause required - explain in Part VI. See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any, to 2021</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>From 2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>From 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>From 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>From 2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>From 2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Total of lines 3a through 3e</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Applied to 2021 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Carryover from 2016 not applied (see instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Remainder. Subtract lines 3g, 3h, and 3i from line 3f.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Distributions for 2021 from Section D, line 7:</td>
<td>$</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Applied to 2021 distributable amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Remainder. Subtract lines 4a and 4b from line 4.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Remaining underdistributions for years prior to 2021, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Remaining underdistributions for 2021. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See Instructions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Excess distributions carryover to 2022. Add lines 3j and 4c.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Breakdown of line 7:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Excess from 2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Excess from 2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Excess from 2019</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Excess from 2020</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Excess from 2021</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 5, 6, 8a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.

(See instructions.)
### Part I: Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

<table>
<thead>
<tr>
<th></th>
<th>Donor advised funds</th>
<th>Funds and other accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total number at end of year</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Aggregate value of contributions to (during year)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aggregate value of grants from (during year)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Aggregate value at end of year</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? Yes No</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Yes No</td>
<td></td>
</tr>
</tbody>
</table>

### Part II: Conservation Easements.

- **Purpose(s) of conservation easements held by the organization (check all that apply).**
  - Preservation of land for public use (for example, recreation or education)
  - Protection of natural habitat
  - Preservation of open space
  - Preservation of a historically important land area
  - Preservation of a certified historic structure

- **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
  - Total number of conservation easements
  - Total acreage restricted by conservation easements
  - Number of conservation easements on a certified historic structure included in (a)
  - Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register

- **Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year.**

- **Number of states where property subject to conservation easement is located.**

- **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

- **Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year.**

- **Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year.**

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

- **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.

- **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.**

- **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:**
  - Revenue included on Form 990, Part VIII, line 1
  - Assets included in Form 990, Part X

- **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:**
  - Revenue included on Form 990, Part VIII, line 1
  - 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:

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1c</td>
</tr>
<tr>
<td>1d</td>
</tr>
<tr>
<td>1e</td>
</tr>
<tr>
<td>1f</td>
</tr>
</tbody>
</table>

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

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

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

1a Beginning of year balance
   b Contributions
   c Net investment earnings, gains, and losses
   d Grants or scholarships
   e Other expenditures for facilities and programs
   f Administrative expenses
   g End of year balance

<table>
<thead>
<tr>
<th>a</th>
<th>b</th>
<th>c</th>
<th>d</th>
<th>e</th>
<th>f</th>
<th>g</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Current year</td>
<td>(b) Prior year</td>
<td>(c) Two years back</td>
<td>(d) Three years back</td>
<td>(e) Four years back</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
   a Board designated or quasi-endowment %
   b Permanent endowment %
   c Term endowment %

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

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

   □ Yes □ No

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

   □ Yes □ No

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.

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Land</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Buildings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c Leasehold improvements</td>
<td></td>
<td>85,736.</td>
<td>12,860.</td>
<td>72,876.</td>
</tr>
<tr>
<td>d Equipment</td>
<td></td>
<td>425,145.</td>
<td>333,954.</td>
<td>91,191.</td>
</tr>
<tr>
<td>e Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (b), line 10c.) □ 164,067.
### Part VII | Investments - Other Securities

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

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) Closely held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(A) BENEFICIAL INTEREST IN</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(B) TRUST</td>
<td>1,712,424</td>
<td>COST</td>
</tr>
<tr>
<td>(C)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(E)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(G)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(H)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) 1,712,424.

### Part VIII | Investments - Program Related

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

### Part IX | Other Assets

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
</tbody>
</table>

Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)

### Part X | Other Liabilities

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

1. (a) Description of liability | (b) Book value |
   (1) Federal income taxes     |                |
   (2) FUNDS HELD FOR OTHERS    | 28,464         |
   (3) FUNDS HELD FOR PENSION TERMINATION | 2,662,627.  |
   (4)                        |               |
   (5)                        |               |
   (6)                        |               |
   (7)                        |               |
   (8)                        |               |
   (9)                        |               |

Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) 2,691,091.

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 XII. [X]

Schedule D (Form 990) 2021
### 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.

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

### 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.

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

### 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 X, LINE 2:**

**INCOME TAX UNCERTAINTIES:** THE ORGANIZATION HAS ADOPTED FINANCIAL ACCOUNTING STANDARDS BOARD (FASB) GUIDANCE RELATED TO ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES, WHICH CLARIFIES THE ACCOUNTING FOR INCOME TAXES BY PRESCRIBING THE MINIMUM RECOGNITION THRESHOLD THAT A TAX POSITION IS REQUIRED TO MEET BEFORE BEING RECOGNIZED IN THE ORGANIZATION'S FINANCIAL STATEMENTS.


132004 10-20-21

25

15481213 759400 707775.000 2021.05010 UNITED WAY OF GREATER RIC 707775.1
ANTICIPATED, TAX ISSUES BASED ON THE ORGANIZATION'S ANALYSIS OF WHETHER ADDITIONAL TAXES WOULD BE DUE TO THE AUTHORITIES GIVEN THEIR FULL KNOWLEDGE OF THE TAX POSITION. THE ORGANIZATION ACCRUES INTEREST AND PENALTIES RELATED TO UNRECOGNIZED TAX BENEFITS AS OTHER NONCURRENT LIABILITIES AND RECOGNIZES THE RELATED CHANGES IN THE ORGANIZATION'S ASSESSMENTS AS A COMPONENT OF INCOME TAX EXPENSE. THE ORGANIZATION HAS COMPLETED ITS ASSESSMENT AND DETERMINED THAT THERE WERE NO TAX POSITIONS, WHICH WOULD REQUIRE RECOGNITION UNDER THE GUIDANCE. THE ORGANIZATION IS NOT CURRENTLY UNDER AUDIT BY ANY TAX JURISDICTION.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATIONS 15,555,484.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATIONS 15,555,484.
Grants and Other Assistance to Organizations, Governments, and Individuals in the United States

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

Attach to Form 990.

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

Name of the organization: UNITED WAY OF GREATER RICHMOND & PETERSBURG

Employer identification number: 23-7375346

**Part I** General Information on Grants and Assistance

1. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☒ Yes ☐ No

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

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

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of noncash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of noncash assistance</th>
<th>(h) Purpose of grant or assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADVANCED ENERGY SOLUTIONS</td>
<td>N/A</td>
<td>242,324.</td>
<td>0.</td>
<td>DONOR DIRECTS</td>
<td>FUNDS ( Designations ) FOR ENERGY SHARE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>500 FREEMAN AVENUE, SUITE 106</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHESAPEAKE, VA 23324</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALBEMARLE ELECTRIC MEMBERSHIP</td>
<td>N/A</td>
<td>12,221.</td>
<td>0.</td>
<td>DONOR DIRECTS</td>
<td>FUNDS ( Designations ) FOR ENERGY SHARE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P. O. BOX 69</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HERTFORD, NC 27944</td>
<td>56-0475840</td>
<td>501(C)(12)</td>
<td>12,221.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMERIGAS PITTSBURGH</td>
<td>N/A</td>
<td>19,886.</td>
<td>0.</td>
<td>DONOR DIRECTS</td>
<td>FUNDS ( Designations ) FOR ENERGY SHARE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>P. O. BOX 371473</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PITTSBURGH, PA 15250</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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2. Enter total number of section 501(c)(3) and government organizations listed in the line 1 table: 91.

3. Enter total number of other organizations listed in the line 1 table: 40.

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990.

132101 10-26-21
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Schedule I (Form 990)
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## UNITED WAY OF GREATER RICHMOND

### & PETERSBURG

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

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<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of noncash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
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Schedule I (Form 990)

122241
11-18-21

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<td>READING AND EDUCATION FOR ADULT DEVELOPMENT, INC. - 4915 Radford Avenue #204 - Richmond, VA 23230</td>
<td>54-1364885</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td>(c) IRC section if applicable</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
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<td>DIX CONSTRUCTION SERVICES INC. 711 HOSPITAL STREET, SUITE 26 RICHMOND, VA 23219</td>
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<td>PARKER OIL CO - HOPFENWELL, VA P.O. BOX 270 HOPFENWELL, VA 23860</td>
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<td>CHESAPEAKE, VA 23467</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
**Part III**

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

<table>
<thead>
<tr>
<th>(a) Type of grant or assistance</th>
<th>(b) Number of recipients</th>
<th>(c) Amount of cash grant</th>
<th>(d) Amount of non-cash assistance</th>
<th>(e) Method of valuation (book, FMV, appraisal, other)</th>
<th>(f) Description of noncash assistance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

**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:**

WE BELIEVE IN COMPREHENSIVE SOLUTIONS TO COMBAT OUR REGION'S MOST PRESSING ISSUES. THROUGH OUR STEPS TO SUCCESS GRANTS, LOCAL NONPROFIT AGENCIES CAN APPLY FOR FUNDING TO HELP US REACH A COMMON GOAL OF BETTERING OUR COMMUNITIES. EVERY PROGRAM FUNDED THROUGH A STEPS TO SUCCESS GRANT IS MONITORED, EVALUATED AND MEASURED FOR EFFECTIVENESS. IN THIS WAY, UNITED WAY VALIDATES THAT INVESTMENTS GET RESULTS AND MAKE A DIFFERENCE WHERE IT MATTERS MOST. THE ORGANIZATIONS THAT RECEIVED $5,000 OR MORE ARE LISTED ABOVE.
UNITED WAY OF GREATER RICHMOND

UNITED WAY RELIES ON VOLUNTEERS TO SUPPORT THE FUNDING PROCESS. THE COMMUNITY IMPACT COUNCIL IS STAFFED BY A GROUP OF DEDICATED VOLUNTEERS. THE COMMUNITY IMPACT COUNCIL, A SUB-COMMITTEE OF UNITED WAY'S BOARD OF DIRECTORS, UNDERSTANDS BOTH UNITED WAY'S STRATEGIC FRAMEWORK AND THE EVER-CHANGING NEEDS OF THE REGION. THE GROUP REVIEWS DATA, RESEARCH AND BEST PRACTICES AND MAINTAIN PERIODIC CONTACT WITH FUNDED PROGRAMS AND AGENCIES. THE COMMUNITY IMPACT COUNCIL IS RESPONSIBLE FOR HOLDING MONTHLY MEETINGS TO MONITOR AND ASSESS COMMUNITY AND HUMAN SERVICE NEEDS AND MAKING RECOMMENDATIONS THAT ENABLE UNITED WAY TO EFFECTIVELY ALLOCATE RESOURCES.

FUNDING IS MADE POSSIBLE THROUGH THE GENEROUS GIFTS FROM DONORS WHO GIVE THROUGH WORKPLACE CAMPAIGNS OR MAKE INDIVIDUAL GIFTS.
## 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.
- Go to www.irs.gov/Form990 for instructions and the latest information.
- Attach to Form 990.

### Employer Identification number

**United Way of Greater Richmond & Petersburg**

**23-7375346**

### Part I  Questions Regarding Compensation

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.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] First-class or charter travel</td>
<td>[ ] Housing allowance or residence for personal use</td>
</tr>
<tr>
<td>[ ] Travel for companions</td>
<td>[ ] Payments for business use of personal residence</td>
</tr>
<tr>
<td>[ ] Tax indemnification and gross-up payments</td>
<td>[ ] Health or social club dues or initiation fees</td>
</tr>
<tr>
<td>[ ] Discretionary spending account</td>
<td>[ ] Personal services (such as maid, chauffeur, chef)</td>
</tr>
</tbody>
</table>

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?

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.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ] Compensation committee</td>
<td>[ ] Written employment contract</td>
</tr>
<tr>
<td>[x] Independent compensation consultant</td>
<td>[x] Compensation survey or study</td>
</tr>
<tr>
<td>[x] Form 990 of other organizations</td>
<td>[ ] Approval by the board or compensation committee</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>a</th>
<th>Receive a severance payment or change-of-control payment?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>b</th>
<th>Participate in or receive payment from a supplemental nonqualified retirement plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>c</th>
<th>Participate in or receive payment from an equity-based compensation arrangement?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>a</th>
<th>The organization?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>b</th>
<th>Any related organization?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>a</th>
<th>The organization?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>b</th>
<th>Any related organization?</th>
</tr>
</thead>
<tbody>
<tr>
<td>[ ]</td>
<td>[x]</td>
</tr>
</tbody>
</table>

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 53.4958-6(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 | |

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

Schedule J (Form 990) 2021
### United Way of Greater Richmond & Petersburg - Schedule J (Form 990) 2021

**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.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Breakdown of W-2 and/or 1099-MISC and/or 1099-NEC Compensation</th>
<th>(C) Retirement and Other Deferred Compensation</th>
<th>(D) Nontaxable Benefits</th>
<th>(E) Total of columns (B)(i)-(D)</th>
<th>(F) Compensation in column (B) reported as deferred on prior Form 990</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) JAMES L. M. TAYLOR,</td>
<td>(i) 177,451.</td>
<td>(ii) 0.</td>
<td>0.</td>
<td>10,758.</td>
<td>188,209.</td>
</tr>
<tr>
<td>PRESIDENT &amp; CEO</td>
<td>(iii) 0.</td>
<td></td>
<td>0.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Schedule J (Form 990) 2021**
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.
**Noncash Contributions**

**Part I**

<table>
<thead>
<tr>
<th>Types of Property</th>
<th>(a) Check if applicable</th>
<th>(b) Number of contributions or items contributed</th>
<th>(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g</th>
<th>(d) Method of determining noncash contribution amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Art - Works of art</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Art - Historical treasures</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>3. Art - Fractional interests</td>
<td></td>
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<tr>
<td>4. Books and publications</td>
<td></td>
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<tr>
<td>5. Clothing and household goods</td>
<td></td>
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<tr>
<td>6. Cars and other vehicles</td>
<td></td>
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<tr>
<td>7. Boats and planes</td>
<td></td>
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<tr>
<td>8. Intellectual property</td>
<td></td>
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</tr>
<tr>
<td>9. Securities - Publicly traded</td>
<td></td>
<td><strong>X</strong> 10</td>
<td><strong>151,061. NYSE</strong></td>
<td></td>
</tr>
<tr>
<td>10. Securities - Closely held stock</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>11. Securities - Partnership, LLC, or trust Interests</td>
<td></td>
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</tr>
<tr>
<td>12. Securities - Miscellaneous</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Qualified conservation contribution - Historic structures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Qualified conservation contribution - Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Real estate - Residential</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>16. Real estate - Commercial</td>
<td></td>
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</tr>
<tr>
<td>17. Real estate - Other</td>
<td></td>
<td></td>
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<tr>
<td>18. Collectibles</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>19. Food inventory</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>20. Drugs and medical supplies</td>
<td></td>
<td></td>
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<tr>
<td>21. Taxidermy</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>22. Historical artifacts</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>23. Scientific specimens</td>
<td></td>
<td></td>
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<tr>
<td>24. Archeological artifacts</td>
<td></td>
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<tr>
<td>25. Other</td>
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<tr>
<td>26. Other</td>
<td></td>
<td></td>
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<tr>
<td>27. Other</td>
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<tr>
<td>28. Other</td>
<td></td>
<td></td>
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</tbody>
</table>

**29.** Number of Forms 8283 received by the organization during the tax year for contributions for which the organization competed Form 8283, Part V, Donor Acknowledgement

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>X</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>X</strong></td>
</tr>
</tbody>
</table>

**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?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>X</strong></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>X</strong></td>
</tr>
</tbody>
</table>

**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.
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.
FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

DESERVES TO BE SUPPORTED ALONG THE PATH TO SUCCESS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

IN OUR COMMUNITY THAT PROVIDE HELP FOR INDIVIDUALS IN THE MOST NEEDED AREAS.

UNITED WAY’S COMMUNITY IMPACT WORK AND FUNDING IS DRIVEN BY OUR STEPS TO SUCCESS MODEL, WHICH ILLUSTRATES KEY MILESTONES ON THE PATH TO SUCCESS: BASIC NEEDS: FOOD, SAFETY & HOUSING; BORN HEALTHY; KINDERGARTEN READINESS; THIRD GRADE READING; MIDDLE SCHOOL ENGAGEMENT; HIGH SCHOOL GRADUATION; COLLEGE/CAREER READINESS; FINANCIAL WELL-BEING; AND CONNECTED & HEALTHY OLDER ADULTS.

AS A MAJOR REGIONAL FUNDING ORGANIZATION, UNITED WAY IS UNIQUELY QUALIFIED TO PROVIDE CRITICAL INFORMATION TO COMMUNITY LEADERS AND ORGANIZATIONS. WE HAVE A DEDICATED RESEARCH TEAM THAT STUDIES LOCAL DATA TO TRACK PROBLEMS IN OUR COMMUNITIES AND WORKS WITH PARTNER ORGANIZATIONS TO DEVELOP SOLUTIONS THAT ACTUALLY MOVE THE NEEDLE.

FORM 990, PART VI, SECTION B, LINE 11B:

THE DRAFT OF THE FORM 990 IS PROPOSED TO THE AUDIT COMMITTEE BY MANAGEMENT. ONCE THE AUDIT COMMITTEE APPROVES IT, THE FORM 990 IS DISTRIBUTED TO THE BOARD OF DIRECTORS FOR REVIEW. AFTER REVIEW BY THE BOARD OF DIRECTORS, THE FORM 990 IS FILED WITH THE IRS.
FORM 990, PART VI, SECTION B, LINE 12C:

UNITED WAY'S CONFLICT OF INTEREST POLICY IS GIVEN TO ALL NEW EMPLOYEES AND DIRECTORS DURING THEIR ORIENTATION. THEY ARE REQUIRED TO SIGN THE POLICY ACKNOWLEDGING THAT THEY RECEIVED IT. BOTH THE DIRECTORS AND EMPLOYEES ARE REQUIRED TO SIGN THE CONFLICT OF INTEREST POLICY ANNUALLY WHICH IS REGULARLY AND CONSISTENTLY MONITORED AND ENFORCED FOR BOTH DIRECTORS AND EMPLOYEES.

FORM 990, PART VI, SECTION B, LINE 15:

BOARD OF DIRECTORS LEADERSHIP DETERMINES THE CEO'S AND OTHER KEY EMPLOYEES' COMPENSATION. THE CEO AND OTHER KEY EMPLOYEE COMPENSATION IS REVIEWED ANNUALLY. THIS COMMITTEE REVIEWS MARKET DATA TO ENSURE THAT THE COMPENSATION LEVELS ARE IN LINE WITH THE MARKET AND OTHER SIMILAR ORGANIZATIONS. THE ORGANIZATION ALSO HAS AN INDEPENDENT COMPENSATION STUDY PERFORMED EVERY THREE TO FIVE YEARS.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC UPON REQUEST.