

EXTENDED TO MAY 15, 2023

Form **990****Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

Department of the Treasury  
Internal Revenue Service

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

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

▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**2021**Open to Public  
Inspection**A** For the 2021 calendar year, or tax year beginning **JUL 1, 2021** and ending **JUN 30, 2022****B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization**UNITED WAY OF GREATER RICHMOND & PETERSBURG**

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

**7814 CAROUSEL LANE**

Room/suite

**400**

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

**RICHMOND, VA 23294****F** Name and address of principal officer: **ANGELA OTTO****SAME AS C ABOVE****D** Employer identification number**23-7375346****E** Telephone number**804-771-5820****G** Gross receipts \$**22,685,809.****H(a)** Is this a group returnfor subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions

**H(c)** Group exemption number ▶**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: **WWW.YOURUNITEDWAY.ORG****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **1911****M** State of legal domicile: **VA****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****1500****7 a** Total unrelated business revenue from Part VIII, column (C), line 12**7a****0.****b** Net unrelated business taxable income from Form 990-T, Part I, line 11**7b****0.**

		Prior Year		Current Year	
Revenue	<b>8</b> Contributions and grants (Part VIII, line 1h)		<b>24,234,241.</b>		<b>21,100,474.</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)		<b>0.</b>		<b>0.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)		<b>326,761.</b>		<b>640,527.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		<b>536,915.</b>		<b>925,994.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)		<b>25,097,917.</b>		<b>22,666,995.</b>
Expenses	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)		<b>17,830,153.</b>		<b>18,435,484.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)		<b>0.</b>		<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)		<b>2,882,033.</b>		<b>2,630,211.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)		<b>0.</b>		<b>0.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>1,417,234.</b>				
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)		<b>2,177,265.</b>		<b>1,726,154.</b>
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)		<b>22,889,451.</b>		<b>22,791,849.</b>
	<b>19</b> Revenue less expenses. Subtract line 18 from line 12		<b>2,208,466.</b>		<b>-124,854.</b>
Net Assets or Fund Balances	<b>20</b> Total assets (Part X, line 16)	Beginning of Current Year	<b>22,084,663.</b>	End of Year	<b>16,886,120.</b>
	<b>21</b> Total liabilities (Part X, line 26)		<b>12,634,410.</b>		<b>8,996,441.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20		<b>9,450,253.</b>		<b>7,889,679.</b>

**Part II Signature Block**

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

**Sign Here** ▶ Angela Otto Signature of officer 12/14/2022 Date

▶ **ANGELA OTTO, INTERIM CHIEF EXECUTIVE OFFICER**  
Type or print name and title

**Paid Preparer Use Only**

Print/Type preparer's name <b>JAYME MIKA</b>	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	PTIN <b>P00852731</b>
Firm's name ▶ <b>KEITER, STEPHENS, HURST, GARY &amp; SHREAVES</b>	Firm's EIN ▶ <b>54-1631262</b>			
Firm's address ▶ <b>4401 DOMINION BLVD GLEN ALLEN, VA 23060</b>	Phone no. (804) <b>747-0000</b>			

May the IRS discuss this return with the preparer shown above? See instructions

☒ Yes ☐ No

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

Form 990 (2021)

23-7375346 Page 2

**Part III** Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission:

**WE BELIEVE THAT EVERY INDIVIDUAL, PARTICULARLY THOSE WHO FACE  
LONGSTANDING 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? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

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

If "Yes," describe these changes on Schedule O.

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code: ) (Expenses \$ **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 (Code: ) (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.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e Total program service expenses **20,677,311.**

Form 990 (2021)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346

Page **3**

**Part IV Checklist of Required Schedules**

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

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page 4

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

	Yes	No
<b>22</b> 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? <i>If "Yes," complete Schedule I, Parts I and III</i>		<b>X</b>
<b>23</b> 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? <i>If "Yes," complete Schedule J</i>	<b>X</b>	
<b>24a</b> 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? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		<b>X</b>
<b>24b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
<b>24c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
<b>24d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		<b>X</b>
<b>25b</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? <i>If "Yes," complete Schedule L, Part I</i>		<b>X</b>
<b>26</b> 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? <i>If "Yes," complete Schedule L, Part II</i>		<b>X</b>
<b>27</b> 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? <i>If "Yes," complete Schedule L, Part III</i>		<b>X</b>
<b>28</b> 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):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i>		<b>X</b>
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	<b>X</b>	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		<b>X</b>
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		<b>X</b>
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		<b>X</b>
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		<b>X</b>
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		<b>X</b>
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)?		<b>X</b>
<b>35b</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)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		<b>X</b>
<b>37</b> 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? <i>If "Yes," complete Schedule R, Part VI</i>		<b>X</b>
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19?	<b>X</b>	

**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 ☐

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	<b>24</b>	
<b>1b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	<b>0</b>	
<b>1c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>X</b>	

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346

Page 5

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

		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2a	47		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note:</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, 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)?		X
b	If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
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?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
d	If "Yes," indicate the number of Forms 8282 filed during the year		
7d			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
7f			
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
7g			
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
7h			
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
8			
9	<b>Sponsoring organizations maintaining donor advised funds.</b>		
a	Did the sponsoring organization make any taxable distributions under section 4966?		
9a			
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
9b			
10	<b>Section 501(c)(7) organizations.</b> Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	<b>Section 501(c)(12) organizations.</b> Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
a	Is the organization licensed to issue qualified health plans in more than one state? <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	X
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	X
17	<b>Section 501(c)(21) organizations.</b> Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17	

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page 6

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

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

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year	<b>1a</b>	19	
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
<b>b</b> Enter the number of voting members included on line 1a, above, who are independent	<b>1b</b>	19	
<b>2</b> 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?	<b>2</b>		X
<b>3</b> 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?	<b>3</b>		X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	<b>4</b>		X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets?	<b>5</b>		X
<b>6</b> Did the organization have members or stockholders?	<b>6</b>		X
<b>7a</b> 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?	<b>7a</b>		X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	<b>7b</b>		X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
<b>a</b> The governing body?	<b>8a</b>	X	
<b>b</b> Each committee with authority to act on behalf of the governing body?	<b>8b</b>	X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O	<b>9</b>		X

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

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

**Section C. Disclosure**

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

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

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page 7

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

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

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

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

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JAMES L. M. TAYLOR PRESIDENT & CEO	40.00			X				177,451.	0.	10,758.
(2) ANGELA OTTO VP OF PROGRAMS & ADMIN	40.00			X				104,074.	0.	4,936.
(3) BRIAN WACHUR VP OF MARKETING & COM - ENDED 6/15/2	40.00			X				102,500.	0.	4,936.
(4) AUDREY TRUSSELL VP OF COM IMPACT - ENDED 4/21/22	40.00			X				94,627.	0.	4,936.
(5) DANIEL KEARNS COO - ENDED 6/30/21	40.00			X				70,434.	0.	2,461.
(6) PHILIP AVANT DIRECTOR	1.00	X						0.	0.	0.
(7) CINDY BUCKLER DIRECTOR	1.00	X						0.	0.	0.
(8) THERESA CHAMBLESS DIRECTOR	1.00	X						0.	0.	0.
(9) LARRY COTTRILL DIRECTOR	1.00	X						0.	0.	0.
(10) BOBBY COWGILL DIRECTOR	1.00	X						0.	0.	0.
(11) DONNA CRAVER DIRECTOR	1.00	X						0.	0.	0.
(12) DANIELLE FITZ-HUGH DIRECTOR	1.00	X						0.	0.	0.
(13) TAMMY HORNSBY-FINK DIRECTOR	1.00	X						0.	0.	0.
(14) JACKIE LARKIN DIRECTOR	1.00	X						0.	0.	0.
(15) DEL LIPSCOMBE DIRECTOR	1.00	X						0.	0.	0.
(16) ASHANTE SMITH DIRECTOR	1.00	X						0.	0.	0.
(17) KELLY TILL DIRECTOR	1.00	X						0.	0.	0.

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page **8**

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) SUSAN TRIGGS DIRECTOR	1.00	X						0.	0.	0.
(19) LYNN WHITE DIRECTOR	1.00	X						0.	0.	0.
(20) JAMES J.L. STEGMAIER INTERMEDIATE PAST CHAIR	1.00	X		X				0.	0.	0.
(21) JONATHAN LEON CHAIR	1.00	X		X				0.	0.	0.
(22) CORYNNE ARNETT FIRST VICE CHAIR	1.00	X		X				0.	0.	0.
(23) LAKSHMI ALGAPPAN SECOND VICE CHAIR	1.00	X		X				0.	0.	0.
(24) PETER PERKINS TREASURER	1.00	X		X				0.	0.	0.
<b>1b Subtotal</b>								549,086.	0.	28,027.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								549,086.	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**

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

**Section B. Independent Contractors**

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

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

**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**

Form **990** (2021)



**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page **9**

**Part VIII Statement of Revenue**

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	1 a	Federated campaigns	1a	25,835.			
	b	Membership dues	1b				
	c	Fundraising events	1c				
	d	Related organizations	1d				
	e	Government grants (contributions)	1e	646,778.			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	20,427,861.			
	g	Noncash contributions included in lines 1a-1f	1g	\$ 151,061.			
	h	<b>Total.</b> Add lines 1a-1f		21,100,474.			
<b>Program Service Revenue</b>				<b>Business Code</b>			
	2 a						
	b						
	c						
	d						
	e						
	f	All other program service revenue					
g	<b>Total.</b> Add lines 2a-2f						
<b>Other Revenue</b>	3	Investment income (including dividends, interest, and other similar amounts)		124,343.			124,343.
	4	Income from investment of tax-exempt bond proceeds					
	5	Royalties					
	6 a	Gross rents	(i) Real	(ii) Personal			
	6b	Less: rental expenses					
	6c	Rental income or (loss)					
	d	Net rental income or (loss)					
	7 a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
	7b	Less: cost or other basis and sales expenses					
	7c	Gain or (loss)					
	d	Net gain or (loss)		516,184.			516,184.
	8 a	Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18					
	8b	Less: direct expenses					
	c	Net income or (loss) from fundraising events					
	9 a	Gross income from gaming activities. See Part IV, line 19					
	9b	Less: direct expenses					
	c	Net income or (loss) from gaming activities					
10 a	Gross sales of inventory, less returns and allowances						
10b	Less: cost of goods sold						
c	Net income or (loss) from sales of inventory						
<b>Miscellaneous Revenue</b>				<b>Business Code</b>			
	11 a	FEES - 3RD PARTY PROC.	900099	591,096.	591,096.		
	b	ENDOWMENT INCOME	900099	244,067.	244,067.		
	c	FEES - DONOR DESIGNATIONS	900099	69,974.	69,974.		
	d	All other revenue	900099	20,857.	20,857.		
e	<b>Total.</b> Add lines 11a-11d			925,994.			
12	<b>Total revenue.</b> See instructions			22,666,995.	925,994.	0.	640,527.

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page **10**

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	18,435,484.	18,435,484.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	577,115.	126,816.	175,863.	274,436.
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	1,395,443.	830,338.	185,770.	379,335.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	193,117.	95,593.	38,945.	58,579.
<b>9</b> Other employee benefits	333,547.	174,095.	46,628.	112,824.
<b>10</b> Payroll taxes	130,989.	60,167.	24,601.	46,221.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal				
<b>c</b> Accounting				
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	35,290.		35,290.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)	445,557.	171,700.	49,346.	224,511.
<b>12</b> Advertising and promotion				
<b>13</b> Office expenses				
<b>14</b> Information technology				
<b>15</b> Royalties				
<b>16</b> Occupancy	194,160.	105,443.	24,102.	64,615.
<b>17</b> Travel	7,958.	3,497.	260.	4,201.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	11,587.	6,612.	2,227.	2,748.
<b>20</b> Interest				
<b>21</b> Payments to affiliates	294,828.	145,940.	59,457.	89,431.
<b>22</b> Depreciation, depletion, and amortization	47,563.	23,544.	9,592.	14,427.
<b>23</b> Insurance				
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
<b>a</b> <b>PROGRAM EXPENSES</b>	407,096.	407,096.		
<b>b</b> <b>EQUIPMENT MAINTENANCE</b>	136,580.	65,485.	28,391.	42,704.
<b>c</b> <b>PRINTING AND PUBLICATIONS</b>	94,046.	4,077.	300.	89,669.
<b>d</b> <b>SUPPLIES</b>	22,997.	14,332.	2,303.	6,362.
<b>e</b> All other expenses	28,492.	7,092.	14,229.	7,171.
<b>25</b> Total functional expenses. Add lines 1 through 24e	22,791,849.	20,677,311.	697,304.	1,417,234.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ if following SOP 98-2 (ASC 958-720)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Form 990 (2021)

23-7375346 Page 11

**Part X Balance Sheet**

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

		(A) Beginning of year		(B) End of year
<b>Assets</b>	1 Cash - non-interest-bearing .....		1	
	2 Savings and temporary cash investments .....	10,206,508.	2	7,315,992.
	3 Pledges and grants receivable, net .....	1,416,535.	3	1,153,465.
	4 Accounts receivable, net .....	70,476.	4	192,635.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		6	
	7 Notes and loans receivable, net .....		7	
	8 Inventories for sale or use .....		8	
	9 Prepaid expenses and deferred charges .....	29,890.	9	37,334.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	10a 510,881.		
	b Less: accumulated depreciation .....	10b 346,814.	10c	164,067.
	11 Investments - publicly traded securities .....	5,128,910.	11	6,293,492.
	12 Investments - other securities. See Part IV, line 11 .....	5,007,490.	12	1,712,424.
	13 Investments - program-related. See Part IV, line 11 .....		13	
	14 Intangible assets .....		14	
	15 Other assets. See Part IV, line 11 .....	16,711.	15	16,711.
16 <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	22,084,663.	16	16,886,120.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses .....	196,773.	17	154,522.
	18 Grants payable .....	11,550,188.	18	6,150,828.
	19 Deferred revenue .....	387,447.	19	
	20 Tax-exempt bond liabilities .....		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D .....		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		22	
	23 Secured mortgages and notes payable to unrelated third parties .....		23	
	24 Unsecured notes and loans payable to unrelated third parties .....		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....	500,002.	25	2,691,091.
	26 <b>Total liabilities.</b> Add lines 17 through 25 .....	12,634,410.	26	8,996,441.
	<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>		
27 Net assets without donor restrictions .....		8,067,001.	27	6,527,510.
28 Net assets with donor restrictions .....		1,383,252.	28	1,362,169.
<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>				
29 Capital stock or trust principal, or current funds .....			29	
30 Paid-in or capital surplus, or land, building, or equipment fund .....			30	
31 Retained earnings, endowment, accumulated income, or other funds .....			31	
32 <b>Total net assets or fund balances</b> .....		9,450,253.	32	7,889,679.
33 <b>Total liabilities and net assets/fund balances</b> .....	22,084,663.	33	16,886,120.	

Form 990 (2021)

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

Form 990 (2021)

23-7375346 Page 12

**Part XI** Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	22,666,995.
2	Total expenses (must equal Part IX, column (A), line 25)	2	22,791,849.
3	Revenue less expenses. Subtract line 2 from line 1	3	-124,854.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	9,450,253.
5	Net unrealized gains (losses) on investments	5	-1,435,720.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	7,889,679.

**Part XII** Financial Statements and Reporting

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

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

Form 990 (2021)

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

▶ Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

**2021**

Open to Public  
Inspection

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

Employer identification number  
**23-7375346**

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
- f Enter the number of supported organizations \_\_\_\_\_
- g Provide the following information about the supported organization(s).

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

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 2

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

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

**Section A. Public Support**

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

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4 .....	17762911.	16615740.	16156621.	24234241.	21100474.	95869987.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	106,818.	120,071.	79,997.	90,378.	124,343.	521,607.
9 Net income from unrelated business activities, whether or not the business is regularly carried on .....						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....	495,285.	459,416.	483,581.	536,915.	925,994.	2901191.
11 Total support. Add lines 7 through 10 .....						99292785.

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

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

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

14 Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f)) .....	14	96.55 %
15 Public support percentage from 2020 Schedule A, Part II, line 14 .....	15	96.48 %

16a 33 1/3% support test - 2021. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ..... ☒ X

b 33 1/3% support test - 2020. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ..... ☐

17a 10% -facts-and-circumstances test - 2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... ☐

b 10% -facts-and-circumstances test - 2020. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization ..... ☐

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

Schedule A (Form 990) 2021

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 3

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

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

**Section A. Public Support**

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

**Section B. Total Support**

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

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

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

15 Public support percentage for 2021 (line 8, column (f), divided by line 13, column (f)) .....	15	%
16 Public support percentage from 2020 Schedule A, Part III, line 15 .....	16	%

**Section D. Computation of Investment Income Percentage**

17 Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f)) .....	17	%
18 Investment income percentage from 2020 Schedule A, Part III, line 17 .....	18	%

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

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

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 4

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in **Part VI** how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- 3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer lines 3b and 3c below.
- b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in **Part VI** what controls the organization put in place to ensure such use.
- 4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.
- b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in **Part VI** what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in **Part VI**, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- b **Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c **Substitutions only.** Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in **Part VI**.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (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 II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer line 10b below.
- b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

	Yes	No
<b>1</b>		
<b>2</b>		
<b>3a</b>		
<b>3b</b>		
<b>3c</b>		
<b>4a</b>		
<b>4b</b>		
<b>4c</b>		
<b>5a</b>		
<b>5b</b>		
<b>5c</b>		
<b>6</b>		
<b>7</b>		
<b>8</b>		
<b>9a</b>		
<b>9b</b>		
<b>9c</b>		
<b>10a</b>		
<b>10b</b>		



**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 5

**Part IV Supporting Organizations** (continued)

- 11** Has the organization accepted a gift or contribution from any of the following persons?
- a** A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?
  - b** A family member of a person described on line 11a above?
  - c** A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.

	Yes	No
<b>11a</b>		
<b>11b</b>		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

- 1** Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.
- 2** Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.

	Yes	No
<b>1</b>		
<b>2</b>		

**Section C. Type II Supporting Organizations**

- 1** Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).

	Yes	No
<b>1</b>		

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

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

	Yes	No
<b>1</b>		
<b>2</b>		
<b>3</b>		

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

- 1** Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).
  - a** ☐ The organization satisfied the Activities Test. Complete line 2 below.
  - b** ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.
  - c** ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).

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

- a** Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.
  - b** Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.
- 3** Parent of Supported Organizations. Answer lines 3a and 3b below.
- a** Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in Part VI.
  - b** Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.

	Yes	No
<b>2a</b>		
<b>2b</b>		
<b>3a</b>		
<b>3b</b>		

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 6

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

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

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

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

Section C - Distributable Amount		(A) Prior Year	(B) Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> 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

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule A (Form 990) 2021

23-7375346 Page 7

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

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

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

Schedule A (Form 990) 2021

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

Schedule A (Form 990) 2021

23-7375346 Page 8

**Part VI**

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

**SCHEDULE D**  
(Form 990)Department of the Treasury  
Internal Revenue Service**Supplemental Financial Statements**▶ Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990.

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

OMB No. 1545-0047

**2021**Open to Public  
InspectionName of the organization **UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**Employer identification number  
**23-7375346****Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the  
organization answered "Yes" on Form 990, Part IV, line 6.

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

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

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

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

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

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

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

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

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of  
violations, and enforcement of the conservation easements it holds? .....

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

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

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i)  
and section 170(h)(4)(B)(ii)? .....

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

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

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

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

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

(i) Revenue included on Form 990, Part VIII, line 1 .....	▶ \$ .....
(ii) Assets included in Form 990, Part X .....	▶ \$ .....

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

a Revenue included on Form 990, Part VIII, line 1 .....	▶ \$ .....
b Assets included in Form 990, Part X .....	▶ \$ .....

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

Schedule D (Form 990) 2021

132051 10-28-21

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule D (Form 990) 2021

23-7375346 Page 2

**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      d ☐ Loan or exchange program
- b ☐ Scholarly research      e ☐ Other \_\_\_\_\_
- c ☐ Preservation for future generations
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

- 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- |                                 | Amount |
|---------------------------------|--------|
| c Beginning balance             | 1c     |
| d Additions during the year     | 1d     |
| e Distributions during the year | 1e     |
| f Ending balance                | 1f     |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided on Part XIII ☐

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

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

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

- a Board designated or quasi-endowment ☐ %
- b Permanent endowment ☐ %
- c Term endowment ☐ %

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

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

- (i) Unrelated organizations
- (ii) Related organizations

	Yes	No
3a(i)		
3a(ii)		
3b		

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

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

**Part VI Land, Buildings, and Equipment.**

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements		85,736.	12,860.	72,876.
d Equipment		425,145.	333,954.	91,191.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				164,067.

Schedule D (Form 990) 2021

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

Schedule D (Form 990) 2021

23-7375346 Page **3**

**Part VII Investments - Other Securities.**

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

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
<b>Total.</b> (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.

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (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)	
<b>Total.</b> (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 XIII ... ☒

Schedule D (Form 990) 2021

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

Schedule D (Form 990) 2021

23-7375346 Page 4

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

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

1	Total revenue, gains, and other support per audited financial statements	1	5,640,501.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-1,435,720.
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	-1,435,720.
3	Subtract line 2e from line 1	3	7,076,221.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	35,290.
b	Other (Describe in Part XIII.)	4b	15,555,484.
c	Add lines 4a and 4b	4c	15,590,774.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	22,666,995.

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

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

1	Total expenses and losses per audited financial statements	1	7,201,075.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	0.
3	Subtract line 2e from line 1	3	7,201,075.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	35,290.
b	Other (Describe in Part XIII.)	4b	15,555,484.
c	Add lines 4a and 4b	4c	15,590,774.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	22,791,849.

**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.**

**IN ACCORDANCE WITH THE GUIDANCE, THE ORGANIZATION DISCLOSES THE EXPECTED FUTURE TAX CONSEQUENCES OF UNCERTAIN TAX POSITIONS PRESUMING THE TAXING AUTHORITIES FULL KNOWLEDGE OF THE FACTS AND THE ORGANIZATION'S POSITION AND RECORDS UNRECOGNIZED TAX BENEFITS OR LIABILITIES FOR KNOWN, OR**



**Part XIII** Supplemental Information (continued)

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.

**SCHEDULE I**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

► Attach to Form 990.

► Go to [www.irs.gov/Form990](http://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. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
ADVANCED ENERGY SOLUTIONS 500 FREEMAN AVENUE, SUITE 106 CHESAPEAKE, VA 23324		N/A	242,324.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
ALBEMARLE ELECTRIC MEMBERSHIP P. O. BOX 69 HERTFORD, NC 27944	56-0475840	501(C)(12)	12,221.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
AMERIGAS PITTSBURGH P. O. BOX 371473 PITTSBURGH, PA 15250		N/A	19,886.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
APPAH 4318 N. CARLIN SPRINGS ROAD ARLINGTON, VA 22203		N/A	25,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
APPALACHIAN POWER P. O. BOX 24401 CANTON, OH 44701-4401		N/A	94,659.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
ATLANTIC SPRAY SYSTEMS PO BOX 125 LIGHTFOOT, VA 23090		N/A	130,592.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

**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.

Schedule I (Form 990) 2021

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346 Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BAKER GAS COMPANY PO BOX 790 WILLIAMSTON, NC 27892		N/A	7,923.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
BARC ELECTRIC COOPERATIVE P. O. BOX 264 MILLBORO, VA 24460	54-0130127	501(C)(12)	48,806.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
BOISSEAU OIL PO BOX 38088 RICHMOND, VA 23231		N/A	5,087.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CAPE HATTERAS ELECTRIC COOPERA PO BOX 9 BUXTON, NC 27920		501(C)(12)	6,508.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CENTRAL VIRGINIA ELECTRIC COOP P. O. BOX 247 LOVINGSTON, VA 22949	54-0164798	501(C)(12)	67,069.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CITY OF ELIZABETH CITY P. O. BOX 347 ELIZABETH CITY, NC 27907		GOV	13,728.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CITY OF FRANKLIN P. O. BOX 179 FRANKLIN, VA 23851		GOV	59,254.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CITY OF MANASSAS UTILITIES 8500 PUBLIC WORKS DRIVE MANASSAS, VA 20110		GOV	11,695.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
COLUMBIA GAS P. O. BOX 910 SMITHFIELD, PA 15478		N/A	79,556.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY ELECTRIC COOPERATIVE PO BOX 267 WINDSOR, VA 23487	54-0178963	501(C)(12)	6,546.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
D. MOWRY CONSTRUCTION 5111 B RIVERVIEW ROAD WILLIAMSBURG, VA 23188		N/A	77,081.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
DAVENPORT ENERGY 7 EDMUNDS STREET SOUTH BOSTON, VA 24592		N/A	19,292.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
DIVERSIFIED ENERGY NC 409B NORTH MAIN STREET RICH SQUARE, NC 27869		N/A	9,560.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
DOMINION ENERGY POB25339 5000 DOMINION BOULEVARD GLEN ALLEN, VA 23060		N/A	7,845,119.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
FERRELL GAS 3210 RAEFORD ROAD FAYETTEVILLE, NC 28303		N/A	8,656.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
FREDERICK NORTHUP INC 6658 RICHMOND ROAD WARSAW, VA 22572		N/A	9,499.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
GOOD SHEPARD HOUSING 8305 RICHMOND HIGHWAY #17B ALEXANDRIA, VA 22309	23-7447962	501(C)(3)	28,460.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
GROVE CHRISTIAN OUTREACH 8800 POCAHONTAS TRAIL WILLIAMSBURG, VA 23185	27-0077733	501(C)(3)	38,796.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HABITAT FOR HUMANITY PENINSULA 11011 WARWICK BLVD NEWPORT NEWS, VA 23601	52-1431619	501(C)(3)	75,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
HALIFAX ELECTRIC MEMBERSHIP CO PO BOX 667 ENFIELD, NC 27823		N/A	6,651.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
HARRISONBURG ELECTRIC COMMISS 89 WEST BRUCE STREET HARRISONBURG, VA 22801		N/A	32,811.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
JERNIGAN OIL & PROPANE 415 MAIN STREET RHOSKIE, NC 27910		N/A	8,757.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
LOCAL ENERGY ACTION PROGRAM (L 608 RIDGE STREET CHARLOTTESVILLE, VA 22902		N/A	10,462.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
LOUDOUN HABITAT 700 FIELDSTONE DRIVE, SUITE 128 LEESBURG, VA 20176	54-1666448	501(C)(3)	9,121.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
MECKLENBURG ELEC. COOP 11633 VA-92 CHASE CITY, VA 23924		N/A	112,530.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
NEWSOM OIL COMPANY, INC. 1503 WEST TENTH STREET ROANOKE RAPIDS, NC 27870		N/A	8,378.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
NEXANT INC. DEPT CH 16356 PALATINE, IL 60038		N/A	116,810.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
NORTHERN NECK ELECTRIC P. O. BOX 288 WARSAW, VA 22572	54-0322350	501(C)(12)	30,131.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
NORTHERN VIRGINIA ELECTRIC COO P. O. BOX 34795 ALEXANDRIA, VA 22334	54-0346923	501(C)(12)	95,374.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
PRINCE GEORGE ELECTRIC COOP. P. O. BOX 620 WAVERLY, VA 23890	54-0346866	501(C)(12)	30,094.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
PROJECT: HOMES 88 CARNATION STREET RICHMOND, VA 23225	54-1595851	501(C)(3)	50,686.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
QUARLES ENERGY SERVICES 3300 BEULAH SALISBURY DRIVE FREDERICKSBURG, VA 22401		N/A	15,186.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
RAPPAHANNOCK ELECTRIC COOPERAT P. O. BOX 34849 ALEXANDRIA, VA 22334	54-1135340	501(C)(12)	289,452.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
REBUILDING TOGETHER RICHMOND 3500 PATTERSON AVENUE RICHMOND, VA 23221	54-1652359	501(C)(3)	65,979.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
REED GAS 404 NC HIGHWAY 345 MANTEO, NC 27954		N/A	9,643.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
RICHMOND D.P.U 730 E. BROAD STREET RICHMOND, VA 23219		N/A	14,248.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND**

23-7375346 Page 1

Schedule I (Form 990)

& PETERSBURG

Part II	Continuation of Grants and Other Assistance to Domestic Organizations and Domestic Governments (Schedule I (Form 990), Part II.)						
(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
RICHMOND HABITAT FOR HUMANITY 2281 DABNEY ROAD, SUITE A RICHMOND, VA 23230	54-1385198	501(c)(3)	5,900.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
ROANOKE ELECTRIC COOPERATIVE P. O. BOX 1326 AHOSKIE, NC 27910	56-0378505	501(c)(12)	69,285.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
ROKERIDGE FARMERS COOP. 33 YELLOW RAIL LANE LEXINGTON, VA 24450		501(c)(12)	14,962.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
SHENANDOAH VALLEY ELECTRIC P. O. BOX 236 MT. CRAWFORD, VA 22841	54-0377465	501(c)(12)	72,570.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
SOUTHEAST VA COMMUNITY FOUNDAT 1435 CROSSWAYS BLVD, SUITE 300 CHESAPEAKE, VA 23320	27-2529017	501(c)(3)	64,150.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
SOUTHSIDE ELECTRIC COOP. P. O. BOX 7 CREWE, VA 23930	54-0387895	501(c)(12)	140,516.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
STERLING OIL CO. P. O. BOX 2475 LYNCHBURG, VA 24505		N/A	13,943.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
THE SALVATION ARMY HAMPTON 5525 RABY ROAD NORFOLK, VA 23501		501(c)(3)	19,834.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
TOWN OF BLACKSTONE 100 WEST ELM STREET BLACKSTONE, VA 23824		GOV	8,362.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TOWN OF CULPEPER 400 SOUTH MAIN STREET, SUITE 109 CULPEPER, VA 22701		GOV	15,381.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
TOWN OF ROBERSONVILLE 114 SOUTH MAIN STREET ROBERSONVILLE, NC 27871		GOV	5,057.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
TOWN OF WINDSOR PO BOX 508 WINDSOR, NC 27983		GOV	6,389.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
VIRGINIA BEACH COMMUNITY DEV. 2400 POTTERS ROAD VIRGINIA BEACH, VA 23454	54-1378797	501(C)(3)	142,585.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
VIRGINIA NATURAL GAS P. O. BOX 5409 CAROLSTREAM, IL 60197-5409		N/A	26,458.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
WASHINGTON GAS P. O. BOX 37747 PHILADELPHIA, PA 19101		N/A	41,364.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
WOODFIN OIL CO PO BOX 277 MECHANICSVILLE, VA 23111		N/A	9,094.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
ACCESS NOW, INC. 2821 EMERYWOOD PARKWAY RICHMOND, VA 23219	26-1695468	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
ART 180 114 W. MARSHALL STREET RICHMOND, VA 23220	54-1935207	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)



**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BETTER HOUSING COALITION P. O. BOX 12117 RICHMOND, VA 23241	54-1479059	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
BIG BROTHERS BIG SISTERS SERVICES, INC. - 1707 SUMMIT AVENUE, SUITE 200 - RICHMOND, VA 23230	54-0702502	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
BOYS & GIRLS CLUBS OF METRO RICHMOND - 5511 STAPLES MILL ROAD, SUITE 301 - RICHMOND, VA 23238	54-0564901	501(C)(3)	135,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
CARITAS P. O. BOX 25790 RICHMOND, VA 23260	54-1441917	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
CHILDREN'S HOME SOCIETY OF VIRGINIA - 4200 FITZHUGH AVENUE - RICHMOND, VA 23230	54-0505884	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
CHILDSAVERS 200 NORTH 22ND STREET RICHMOND, VA 23223	54-0505927	501(C)(3)	100,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
CIRCLE CENTER ADULT DAY SERVICES 4900 WEST MARSHALL STREET RICHMOND, VA 23230	54-0991287	501(C)(3)	35,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
COMMONWEALTH CATHOLIC CHARITIES 1601 ROLLING HILLS DRIVE HENRICO, VA 23229	54-0505877	501(C)(3)	40,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
COMMUNITIES IN SCHOOLS OF CHESTERFIELD - P. O. BOX 10 - CHESTERFIELD, VA 23832	46-0651192	501(C)(3)	65,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITIES IN SCHOOLS OF RICHMOND 2922 WEST MARSHALL STREET 2ND FLOOR RICHMOND, VA 23230	54-1799922	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
CROSSOVER HEALTHCARE MINISTRY 8600 QUIOCASIN ROAD, SUITE 102 RICHMOND, VA 23229	54-1371067	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
DAILY PLANET HEALTH SERVICES 517 WEST GRACE STREET RICHMOND, VA 23220	54-0900368	501(C)(3)	32,500.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
FAMILY LIFELINE 2325 WEST BROAD STREET RICHMOND, VA 23220	54-0737133	501(C)(3)	390,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
FEED MORE 1415 RHODMILLER STREET RICHMOND, VA 23220	54-1150923	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
FRIENDS ASSOCIATION FOR CHILDREN 1004 SAINT JOHN STREET RICHMOND, VA 23220	54-0505899	501(C)(3)	115,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
GOOCHLANDCARES P. O. BOX 116 GOOCHLAND, VA 23063	54-1967650	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
GOODWILL OF CENTRAL AND COASTAL VIRGINIA - 6301 MIDLOTHIAN TURNPIKE - RICHMOND, VA 23225	54-0455395	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
GREATER RICHMOND SCAN (STOP CHILD ABUSE NOW) - 103 EAST GRACE STREET - RICHMOND, VA 23219	54-1584969	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HANOVER SAFE PLACE 629A NORTH WASHINGTON HWY ASHLAND, VA 23005	31-1415701	501(C)(3)	45,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
HEALTH BRIGADE 1010 NORTH THOMPSON STREET RICHMOND, VA 23230	54-0927792	501(C)(3)	32,500.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
HIGHER ACHIEVEMENT 4009 FITZHUGH AVENUE RICHMOND, VA 23230	52-1383374	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
HOMEAGAIN P. O. BOX 5222 RICHMOND, VA 23220	54-1159513	501(C)(3)	30,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
HOMEWARD 1125 COMMERCE ROAD RICHMOND, VA 23224	05-0606153	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
HOUSING FAMILIES FIRST 3900 NINE MILE ROAD HENRICO, VA 23223	54-1995917	501(C)(3)	70,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
JEWISH FAMILY SERVICES P. O. BOX 17128 RICHMOND, VA 23226	54-0526201	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
NEXTUP 3409 MOORE STREET RICHMOND, VA 23230	47-4933093	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
OAR OF RICHMOND, INC. 3111 WEST CLAY STREET RICHMOND, VA 23230	54-0974305	501(C)(3)	60,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PATHWAYS-VA, INC. 1200 WEST WASHINGTON STREET PETERSBURG, VA 23803	54-1868900	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
PETER PAUL DEVELOPMENT CENTER 1708 NORTH 22ND STREET RICHMOND, VA 23223	54-1137164	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
PRESBYTERIAN HOMES & FAMILY SERVICES, INC. DBA HUMANKIND - 908 NORTH THOMPSON STREET - RICHMOND, VA 23230	54-0346118	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
PROGRESSIVE ADULT REHABILITATION CENTER, INC - 114 NORTH UNION STREET - PETERSBURG, VA 23803	54-0836365	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
PROJECT: HOMES 88 CARNATION STREET RICHMOND, VA 23225	54-1595851	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
READING AND EDUCATION FOR ADULT DEVELOPMENT, INC. - 4915 RADFORD AVENUE #204 - RICHMOND, VA 23230	54-1364885	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SACRED HEART CENTER, INC 1400 PERRY STREET RICHMOND, VA 23224	54-1590419	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SENIOR CONNECTIONS 24 EAST CARY STREET RICHMOND, VA 23219	54-0950714	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SIDE BY SIDE VA, INC. P. O. BOX 26442 RICHMOND, VA 23261	54-1572424	501(C)(3)	50,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SMART BEGINNINGS GREATER RICHMOND 919 EAST MAIN STREET, SUITE 1700 RICHMOND, VA 23219	51-0252958	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SMART BEGINNINGS SOUTHEAST 209 EAST CAWSON STREET HOEPWELL, VA 23860	47-2749435	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SOAR365 (FORMERLY GREATER RICHMOND ARC) - 3600 SAUNDERS AVENUE - RICHMOND, VA 23227	54-0629691	501(C)(3)	95,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SOUTH RICHMOND ADULT DAY CARE CENTER - 1500 HULL STREET - RICHMOND, VA 23224	51-0163293	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
SOUTHSIDE COMMUNITY DEVELOPMENT HOUSING CORPORATION - 1624 HULL STREET - RICHMOND, VA 23224	54-1480544	501(C)(3)	35,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
ST. JOSEPH'S VILLA 8000 BROOK ROAD RICHMOND, VA 23227	54-0505950	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
THE LITERACY LAB 2920 WEST BROAD STREET, SUITE 111 RICHMOND, VA 23230	27-1777117	501(C)(3)	90,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
THE SALVATION ARMY 2 WEST GRACE STREET RICHMOND, VA 23220	58-0660607	501(C)(3)	65,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
VIRGINIA DENTAL ASSOCIATION FOUNDATION - 3460 MAYLAND COURT, SUITE 110 - RICHMOND, VA 23454	54-1821602	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
VIRGINIA LISC 413 STUART CIRCLE RICHMOND, VA 23220	13-3030229	501(C)(3)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
VIRGINIA SUPPORTIVE HOUSING 5008 MONUMENT AVENUE RICHMOND, VA 23230	54-1444564	501(C)(3)	40,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
YMCA OF GREATER RICHMOND 2 WEST FRANKLIN STREET, 2ND FLOOR RICHMOND, VA 23220	54-0505986	501(C)(3)	115,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
YWCA RICHMOND 6 NORTH 5TH STREET RICHMOND, VA 23219	54-0506493	501(C)(3)	155,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
GREATER HEALTH DISTRICT 301 HALIFAX STREET PETERSBURG, VA 23803		501(C)(12)	30,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
MENTOR VIRGINIA 4900 AUGUSTA AVENUE 140 RICHMOND, VA 23230	54-1814823	501(C)(12)	25,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
THRIVE VIRGINIA P.O. BOX 208 NEW KENT, VA 23124	54-0880233	501(C)(12)	80,000.	0.			DONOR DIRECT FUNDS (DESIGNATIONS) FOR GENERAL PURPOSES
BAPTIST GENERAL CONVENTION 1214 WEST GRAHAM ROAD, SUITE 1 RICHMOND, VA 23220		501(C)(3)	37,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CADA COMMUNITY SERVICE CENTER P.O. BOX 350 RICH SQUARE, NC 27869		501(C)(3)	5,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Page 1

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CHP ENERGY SOLUTIONS 5500 INDUSTRIAL DRIVE CHRISTIANSBURG, VA 24073		N/A	747,280.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
CRAIG-BOTETOURT ELECTRIC COOPERATIVES - P.O. BOX 265 - NEW CASTLE, VA 24127		N/A	8,010.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
D&H CONSTRUCTION SERVICES INC. 711 HOSPITAL STREET, SUITE 26 RICHMOND, VA 23219		N/A	299,071.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
FARRELL INSULATION 10260 FISHER AVENUE TAMPA, FL 33619		N/A	34,693.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
HAMPTON ROADS COMMUNITY 2410 WICKHAM AVENUE NEWPORT NEWS, VA 23607	54-2035996	501(C)(3)	606,023.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
NEW DIXIE OIL CORPORATION NC P.O. BOX 779 ROANOKE RAPIDS, NC 27870		N/A	6,189.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
PARKER OIL CO - HOPEWELL, VA P.O. BOX 270 HOPEWELL, VA 23860		N/A	6,061.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
PARKER OIL COMPANY, INC. CC VA P.O. BOX 248 CHASE CITY, VA 23924		N/A	6,699.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
PIEDMONT NATURAL GAS P.O. BOX 937 TOLEDO, OH 43697		N/A	7,406.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)

**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346 Page 1

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
SALVATION ARMY - FREDERICKSBURG P.O. BOX 179 FREDERICKSBURG, VA 22404		501(C)(3)	6,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
TOWN OF FRONT ROYAL P.O. BOX 1560 FRONT ROYAL, VA 22630		GOV	13,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
VIRGINIA DEPT FOR AGING 8004 FRANKLIN FARMS DRIVE HENRICO, VA 23229		501(C)(3)	20,000.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
VIRGINIA HISPANIC CHAMBER OF COMMERCE - 10700 MIDLOTHIAN TURNPIKE, SUITE 200 - RICHMOND, VA 23235		N/A	7,500.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
VIRGINIA SUPPORTIVE HOUSING 8002 DISCOVERY DRIVE, SUITE 201 RICHMOND, VA 23226	54-1444564	501(C)(3)	5,421.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
WALDEN MECHANICAL, LLC 106 PLEASANT RIDGE COURT SUFFOLK, VA 23435		N/A	9,030.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
WILLIAM NICKERSON 5240 PINE CREST AVENUE RICHMOND, VA 23225		N/A	7,500.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE
YESUSA TRANSFORMATIONAL CITIES 1005 FITCHETT STREET CHESAPEAKE, VA 23467		N/A	5,789.	0.			DONOR DIRECTS FUNDS (DESIGNATIONS) FOR ENERGY SHARE

Schedule I (Form 990)



**UNITED WAY OF GREATER RICHMOND  
& PETERSBURG**

23-7375346

Schedule I (Form 990) 2021

Page 2

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

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

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

**PART I, LINE 2:**

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.

**Part IV** Supplemental Information

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.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

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

OMB No. 1545-0047

**2021**

Open to Public  
Inspection

Name of the organization **UNITED WAY OF GREATER RICHMOND & PETERSBURG** Employer identification number **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.

- |  |  |
|--|--|
| <input type="checkbox"/> First-class or charter travel             | <input type="checkbox"/> Housing allowance or residence for personal use   |
| <input type="checkbox"/> Travel for companions                     | <input type="checkbox"/> Payments for business use of personal residence   |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees     |
| <input type="checkbox"/> Discretionary spending account            | <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) |

**b** If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

**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.

- |   |   |
|---|---|
| <input type="checkbox"/> Compensation committee                     | <input type="checkbox"/> Written employment contract                                |
| <input type="checkbox"/> Independent compensation consultant        | <input checked="" type="checkbox"/> Compensation survey or study                    |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

**4** During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization:

- a** Receive a severance payment or change-of-control payment?
- b** Participate in or receive payment from a supplemental nonqualified retirement plan?
- c** Participate in or receive payment from an equity-based compensation arrangement?
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

**Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.**

**5** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 5a or 5b, describe in Part III.

**6** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization?
- b** Any related organization?
- If "Yes" on line 6a or 6b, describe in Part III.

**7** For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described on lines 5 and 6? If "Yes," describe in Part III

**8** Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III

**9** If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?

Yes No

1b

2

4a

4b

4c

5a

5b

6a

6b

7

8

9

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

Schedule J (Form 990) 2021

## Page 2

**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)-(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.

[illegible]

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.

[illegible]

**SCHEDULE M**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Noncash Contributions**

OMB No. 1545-0047

**2021**

Open to Public  
Inspection

- ▶ Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
- ▶ Attach to Form 990.
- ▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

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

Employer identification number  
**23-7375346**

**Part I Types of Property**

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

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

29

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

	Yes	No
30a		X
31		X
32a		X

b If "Yes," describe the arrangement in Part II.

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

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

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.

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

Schedule M (Form 990) 2021

## Part II

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

**SCHEDULE O  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
▶ Attach to Form 990 or Form 990-EZ.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2021**

Open to Public  
Inspection

Name of the organization

UNITED WAY OF GREATER RICHMOND  
& PETERSBURG

Employer identification number  
23-7375346

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.



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

Employer identification number  
**23-7375346**

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.