

UNITED WAY OF THE BAY AREA PUBLIC

DISCLOSURE COPY

RETURN OF EXEMPT ORGANIZATION

PERIOD ENDED JUNE 30, 2019

Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

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

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

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

OMB No. 1545-0047

2018

Open to Public Inspection

A For the 2018 calendar year, or tax year beginning **JUL 1, 2018** and ending **JUN 30, 2019**

B Check if applicable: Address change Name change Initial return Final return/terminated Amended return Application pending	C Name of organization <div style="border: 1px solid black; padding: 2px;">UNITED WAY OF THE BAY AREA</div> Doing business as <div style="border: 1px solid black; padding: 2px;">Number and street (or P.O. box if mail is not delivered to street address) Room/suite</div> <div style="border: 1px solid black; padding: 2px;">550 KEARNY ST 1000</div> City or town, state or province, country, and ZIP or foreign postal code <div style="border: 1px solid black; padding: 2px;">SAN FRANCISCO, CA 94108</div>	D Employer identification number <div style="border: 1px solid black; padding: 2px;">94-1312348</div>
	E Telephone number <div style="border: 1px solid black; padding: 2px;">415-808-4300</div>	G Gross receipts \$ 31,148,951.
	H(a) Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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: <input checked="" type="checkbox"/> 501(c)(3) 501(c) () ◀ (insert no.) 4947(a)(1) or 527		
J Website: ▶ WWW.UWBA.ORG		
K Form of organization: <input checked="" type="checkbox"/> Corporation Trust Association Other ▶		L Year of formation: 1922 M State of legal domicile: CA

Part I Summary

1	Briefly describe the organization's mission or most significant activities: TO BE THE CATALYST THAT ENABLES PEOPLE TO STRENGTHEN THEIR COMMUNITIES BY INVESTING IN ONE ANOTHER.		
2	Check this box <input type="checkbox"/> 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	30
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	30
5	Total number of individuals employed in calendar year 2018 (Part V, line 2a)	5	81
6	Total number of volunteers (estimate if necessary)	6	3534
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
7b	Net unrelated business taxable income from Form 990-T, line 38	7b	0.
8	Contributions and grants (Part VIII, line 1h)	8	35,899,126.
9	Program service revenue (Part VIII, line 2g)	9	28,105,569.
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	10	544,958.
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	11	1,298,477.
12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	12	559,513.
13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	13	25,037,786.
14	Benefits paid to or for members (Part IX, column (A), line 4)	14	18,653,987.
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	15	0.
16a	Professional fundraising fees (Part IX, column (A), line 11e)	16a	7,498,009.
16b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 3,257,720.	16b	83,888.
17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	17	0.
18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	18	5,060,384.
19	Revenue less expenses. Subtract line 18 from line 12	19	37,680,067.
20	Total assets (Part X, line 16)	20	-421,316.
21	Total liabilities (Part X, line 26)	21	-1,896,380.
22	Net assets or fund balances. Subtract line 21 from line 20	22	29,158,879.

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	<div style="border: 1px solid black; padding: 2px;"> PUBLIC DISCLOSURE COPY Signature of officer MARK SUTTON, EXECUTIVE VICE PRESIDENT & CFO Type or print name and title </div>	Date <div style="border: 1px solid black; padding: 2px;"> Date 05/04/20 </div>
Paid Preparer Use Only	Print/Type preparer's name TRACY S. PAGLIA	Preparer's signature TRACY S. PAGLIA
	Firm's name ▶ MOSS ADAMS LLP	Firm's EIN ▶ 91-0189318
	Firm's address ▶ 101 SECOND STREET SUITE 900 SAN FRANCISCO, CA 94105	Phone no. 415-956-1500

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

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☒ **X****1** Briefly describe the organization's mission:

TO BE THE CATALYST THAT ENABLES PEOPLE TO STRENGTHEN THEIR COMMUNITIES BY INVESTING IN ONE ANOTHER.

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 \$ 13,816,296. including grants of \$ 13,816,296.) (Revenue \$ 1,298,477.)
GROSS FUNDS AWARDED/ALLOCATED TO AGENCIES

4b (Code:) (Expenses \$ 1,186,943. including grants of \$ 100,000.) (Revenue \$ 0.)

211 IS A FREE, EASY-TO-REMEMBER PHONE NUMBER AND WEB RESOURCE THAT ANYONE CAN CALL FOR INFORMATION AND REFERRAL TO RESOURCES. LAST YEAR, UWBA AND ITS PARTNER CALL CENTERS IN EIGHT BAY AREA COUNTIES RESPONDED TO APPROXIMATELY 129,900 CALLS AND TEXTS. MORE THAN HALF OF THESE REQUESTS CAME FROM THOSE REQUESTING HELP WITH POVERTY/BASIC NEEDS ISSUES SUCH AS FOOD, JOBS AND SHELTER. IN ADDITION TO DAILY INFORMATION AND REFERRAL, 211 IS A CRITICAL RESOURCE FOR DISASTERS.

4c (Code:) (Expenses \$ 6,858,399. including grants of \$ 3,804,399.) (Revenue \$ 0.)

SPARKPOINT

SPARKPOINT HAS SERVED MORE THAN 29,000 INDIVIDUALS SINCE LAUNCHING SPARKPOINT OAKLAND IN 2009, AND APPROXIMATELY 6,200 PEOPLE IN THE LAST YEAR ALONE. MORE THAN 20% OF OUR CLIENTS ARE SEEING PROGRESS ON THEIR INCOME, SAVINGS, CREDIT OR DEBT GOALS. SPARKPOINT CENTERS OFFER AN ARRAY OF SERVICES IN ONE CONVENIENT LOCATION FOR A PERSON OR FAMILY TRYING TO MOVE OUT OF POVERTY, INCLUDING FINANCIAL COACHING ON BUDGETING AND SAVINGS, CREDIT AND DEBT MANAGEMENT, CAREER OR EDUCATION COUNSELING, SCREENING FOR PUBLIC BENEFITS, AND OTHERS. SPARKPOINT AIMS TO HAVE CLIENTS MOVE FROM POVERTY TO ECONOMIC SUCCESS BY (1) INCREASING INCOME; (2) REDUCING DEBT; (3) INCREASING CREDIT SCORES; AND (4) INCREASING SAVINGS. THE SPARKPOINT REGIONAL NETWORK INCLUDES MORE THAN

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

(Expenses \$ 3,628,757. including grants of \$ 933,292.) (Revenue \$ 0.)

4e Total program service expenses **25,490,395.**Form **990** (2018)

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>	1 X	
2 Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ?	2 X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	3	X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	4 X	
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III</i>	5	X
6 Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	6 X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	7	X
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>	8	X
9 Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	9 X	
10 Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	10 X	
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	11a X	
b Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	11b	X
c Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	11c	X
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	11d	X
e Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	11e	X
f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	11f X	
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>	12a X	
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>	12b	X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	13	X
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	14b	X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	15	X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	16	X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I</i>	17	X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	18	X
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>	19	X
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	20a	X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	
21 Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21 X	

Part IV Checklist of Required Schedules (continued)

	Yes	No
22 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>	24a	X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b	
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c	
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d	
25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a	X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b	X
26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i>	26	X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i>	27	X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a	X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b	X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c	X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29	X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30	X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31	X
32 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>	32	X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33	X
34 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>	34	X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a	X
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>	35b	
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36	X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37	X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O	38	X

Part V Statements Regarding Other IRS Filings and Tax ComplianceCheck if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
1a Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable	1a	27
b Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	X

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

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2a 81		
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b X	
Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O	3b	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	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?	5a	X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	X
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	X
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	X
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?	9a	X
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	X
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12	10a	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders	11a	
b Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state?	13a	
Note. See the instructions for additional information the organization must report on Schedule O.		
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 in Schedule O	14b	
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	15	X
If "Yes," see instructions and file Form 4720, Schedule N.		
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income?	16	X
If "Yes," complete Form 4720, Schedule O.		

Form 990 (2018)

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 in Schedule O. See instructions.

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

☒

Section A. Governing Body and Management

	1a	1b	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	30			
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.				
b Enter the number of voting members included in line 1a, above, who are independent		30		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?				X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?				X
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?				X
5 Did the organization become aware during the year of a significant diversion of the organization's assets?				X
6 Did the organization have members or stockholders?				X
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?				X
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?				X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
a The governing body?			X	
b Each committee with authority to act on behalf of the governing body?			X	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O				X

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

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

Section C. Disclosure

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

18 Section 6104 requires an organization to make its 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 in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

20 State the name, address, and telephone number of the person who possesses the organization's books and records **KEN EUWEMA - 703-836-7100**
550 KEARNY ST, #1000, SAN FRANCISCO, CA 94108

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck 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 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 and/or Box 7 of Form 1099-MISC) 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.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ 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)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) MOK, ANNA CHAIR	0.10	X		X				0.	0.	0.
(2) SUTHERLAND, SUSAN IMMEDIATE PAST CHAIR	2.00	X		X				0.	0.	0.
(3) DETWEILER, CHARMAINE TREASURER	2.50	X		X				0.	0.	0.
(4) JOHNSON, KEVIN SECRETARY	2.00	X		X				0.	0.	0.
(5) HEACOCK, DAVID ASSISTANT SECRETARY	2.00	X		X				0.	0.	0.
(6) ALLAIRE, KIWOBA DIRECTOR AT LARGE	0.10	X						0.	0.	0.
(7) BLAYLOCK, ADAM DIRECTOR AT LARGE	1.00	X						0.	0.	0.
(8) JULIE DOMINGUEZ DIRECTOR AT LARGE	2.50	X						0.	0.	0.
(9) EBERTS, RALPH DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(10) ECKHARDT, MICHAEL DIRECTOR AT LARGE	0.50	X						0.	0.	0.
(11) HERBERT III, JAMES DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(12) JEROME, MICHAEL DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(13) KO, AMY DIRECTOR AT LARGE	0.40	X						0.	0.	0.
(14) LEE, DANIEL DIRECTOR AT LARGE	2.00	X						0.	0.	0.
(15) LEIBOWITZ, TOM DIRECTOR AT LARGE	0.80	X						0.	0.	0.
(16) LONGHURST, DAVID DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(17) REMSTEDT, LAWRENCE DIRECTOR AT LARGE	0.50	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) RODRIGUEZ, RAUL DIRECTOR AT LARGE	0.80	X						0.	0.	0.
(19) ROGERS, MATT DIRECTOR AT LARGE	0.80	X						0.	0.	0.
(20) STREET, ERIC DIRECTOR AT LARGE	0.80	X						0.	0.	0.
(21) TENNYSON, SHERRY DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(22) WALKER, ROBERT DIRECTOR AT LARGE	0.80	X						0.	0.	0.
(23) WEINSTEIN, LAURIE DIRECTOR AT LARGE	0.30	X						0.	0.	0.
(24) BRANCH, MICHELLE CHAIR, PUBLIC POLICY COMMITTEE	0.50	X						0.	0.	0.
(25) BREBER, PIERRE CHAIR, REG. IMPACT & GROWTH	1.00	X						0.	0.	0.
(26) FOLEY, JIM CHAIR, VOLUNTEER & DONOR	0.80	X						0.	0.	0.
1b Sub-total								0.	0.	0.
c Total from continuation sheets to Part VII, Section A								1,770,345.	0.	173,699.
d Total (add lines 1b and 1c)								1,770,345.	0.	173,699.

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

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- 3** Did the organization list any **former** officer, director, or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? If "Yes," complete Schedule J for such person

	Yes	No
3		X
4	X	
5		X

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
LANXPRT CORPORATION DBA INTIVIX, 605 MARKET STREET, SUITE 410, SAN FRANCISCO, NELSON STAFFING P.O. BOX 49195, SAN JOSE, CA 95161	IT CONSULTING	226,303.
THE PURSUANT GROUP INC P.O. BOX 203421, DALLAS, TX 75320	TEMPORARY STAFFING	175,133.
MOSS ADAMS LLP P.O. BOX 101822, PASADENA, CA 91189	CONSULTING SERVICES	169,000.
PUBLIC PROFIT 1212 BROADWAY, SUITE 501, OAKLAND, CA 94612	AUDIT/TAX SERVICES	121,000.
	CONSULTING SERVICES	115,273.

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

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SEE PART VII, SECTION A CONTINUATION SHEETS

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(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) MATUSZAK, GARY VICE CHAIR, AUDIT COMMITTEE	1.00	X						0.	0.	0.
(28) OLSON, JIM VICE CHAIR, GOVERNANCE COMMITTEE	1.00	X						0.	0.	0.
(29) PAULSON, TIMOTHY LABOR LIAISON	0.30	X						0.	0.	0.
(30) WOHL, JEFFREY GEN. COUNSEL & CHIEF ETHIC	1.00	X		X				0.	0.	0.
(31) WILSON, ANNE CHIEF EXECUTIVE OFFICER	50.00			X				376,380.	0.	-71,368.
(32) BRAUN, JOAN CHIEF OPERATING OFFICER	55.00			X				228,824.	0.	58,192.
(33) GOOCH, NORA CHIEF DEVELOPMENT OFFICER	37.50				X			206,120.	0.	18,038.
(34) GRIFFIN, SIDNEY CHIEF MARKETING OFFICER	37.50				X			168,756.	0.	38,423.
(35) BATSON, KELLY SENIOR VP, CIT	37.50				X			153,974.	0.	19,147.
(36) BUENAVISTA, SARAHVON SENIOR VP, MARKETING	37.50					X		108,067.	0.	21,351.
(37) LI, ENA VP, COMMUNITY INVESTMENT	37.50					X		119,179.	0.	7,204.
(38) JOSEPH, MEGAN EXECUTIVE DIRECTOR, RISE TOGETHER	37.50					X		143,868.	0.	26,490.
(39) KUKOVIC, LIDIYA VP, CONTROLLER	37.50					X		125,707.	0.	30,011.
(40) SCHAUER, JOHN VP, INFORMATION TECHNOLOGY	37.50					X		139,470.	0.	26,211.
Total to Part VII, Section A, line 1c								1,770,345.		173,699.

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	1,646,500.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	26,459,069.				
	g Noncash contributions included in lines 1a-1f: \$		614,921.				
	h Total. Add lines 1a-1f				28,105,569.		
Program Service Revenue	2 a CONSULTING FEE INCOME	Business Code	900099	1,001,918.	1,001,918.		
	b PLEDGE PROCESSING FEES		900099	285,959.	285,959.		
	c OFFICE SPACE RENTAL		900099	10,600.	10,600.		
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f				1,298,477.		
	Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			368,928.		
4 Income from investment of tax-exempt bond proceeds							
5 Royalties							
6 a Gross rents		(i) Real	(ii) Personal				
b Less: rental expenses		208,375.	0.				
c Rental income or (loss)		208,375.					
d Net rental income or (loss)							
7 a Gross amount from sales of assets other than inventory		(i) Securities	(ii) Other				
b Less: cost or other basis and sales expenses		1,167,602.					
c Gain or (loss)		848,025.					
d Net gain or (loss)		319,577.					
8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18		a					
b Less: direct expenses		b					
c Net income or (loss) from fundraising events							
9 a Gross income from gaming activities. See Part IV, line 19		a					
b Less: direct expenses		b					
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances		a					
b Less: cost of goods sold	b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue			Business Code				
11 a							
b							
c							
d All other revenue							
e Total. Add lines 11a-11d							
12 Total revenue. See instructions				30,300,926.	1,298,477.	0.	896,880.

Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	18,653,987.	18,653,987.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	1,417,671.	143,481.	1,060,899.	213,291.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	4,658,907.	2,568,645.	691,332.	1,398,930.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	380,389.	247,333.	19,723.	113,333.
9 Other employee benefits	957,913.	498,461.	232,948.	226,504.
10 Payroll taxes	402,842.	194,890.	113,169.	94,783.
11 Fees for services (non-employees):				
a Management				
b Legal	77,466.		77,466.	
c Accounting	136,000.		136,000.	
d Lobbying	29,047.		29,047.	
e Professional fundraising services. See Part IV, line 17				
f Investment management fees	67,311.		67,311.	
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch. O.)	1,522,142.	1,139,340.	167,873.	214,929.
12 Advertising and promotion	549,491.	419,717.	62,766.	67,008.
13 Office expenses	747,016.	460,368.	128,870.	157,778.
14 Information technology				
15 Royalties				
16 Occupancy	1,263,396.	541,212.	376,788.	345,396.
17 Travel	142,910.	85,854.	19,630.	37,426.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings	522,236.	219,252.	78,975.	224,009.
20 Interest				
21 Payments to affiliates	348,547.	145,972.	105,749.	96,826.
22 Depreciation, depletion, and amortization	242,218.	136,632.	55,105.	50,481.
23 Insurance	53,706.	22,492.	16,294.	14,920.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a UBI TAXES	6,134.		6,134.	
b				
c				
d				
e All other expenses	17,977.	12,759.	3,112.	2,106.
25 Total functional expenses. Add lines 1 through 24e	32,197,306.	25,490,395.	3,449,191.	3,257,720.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

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

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	4,587,814.	1	1,530,184.
	2 Savings and temporary cash investments	869,751.	2	267,569.
	3 Pledges and grants receivable, net	8,853,673.	3	9,867,785.
	4 Accounts receivable, net		4	
	5 Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L		6	
	7 Notes and loans receivable, net		7	160,000.
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	224,835.	9	132,663.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 2,237,872.		
	b Less: accumulated depreciation	10b 1,807,183.	10c	430,689.
	11 Investments - publicly traded securities	13,374,562.	11	13,852,107.
	12 Investments - other securities. See Part IV, line 11	160,000.	12	0.
	13 Investments - program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	538,701.	15	328,648.
16 Total assets. Add lines 1 through 15 (must equal line 34)	29,158,879.	16	26,569,645.	
Liabilities	17 Accounts payable and accrued expenses	5,426,199.	17	6,088,120.
	18 Grants payable	3,479,724.	18	3,009,842.
	19 Deferred revenue	550,340.	19	469,012.
	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 current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties	2,400,000.	23	2,400,000.
	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		25	
	26 Total liabilities. Add lines 17 through 25	11,856,263.	26	11,966,974.
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.			
	27 Unrestricted net assets	6,619,701.	27	4,974,506.
	28 Temporarily restricted net assets	6,786,440.	28	5,731,690.
	29 Permanently restricted net assets	3,896,475.	29	3,896,475.
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, or equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	17,302,616.	33	14,602,671.
	34 Total liabilities and net assets/fund balances	29,158,879.	34	26,569,645.

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Part XI Reconciliation of Net AssetsCheck 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	30,300,926.
2	Total expenses (must equal Part IX, column (A), line 25)	2	32,197,306.
3	Revenue less expenses. Subtract line 2 from line 1	3	-1,896,380.
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	17,302,616.
5	Net unrealized gains (losses) on investments	5	133,809.
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-937,374.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	14,602,671.

Part XII Financial Statements and ReportingCheck 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 in Schedule O.		
2a Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		X
b Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	X	
c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.	X	
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 in Schedule O and describe any steps taken to undergo such audits _____		

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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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	34157980.	33543169.	43336077.	35899126.	28105569.	175041921
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	34157980.	33543169.	43336077.	35899126.	28105569.	175041921
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)						13837482.
6 Public support. Subtract line 5 from line 4.						161204439

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
7 Amounts from line 4	34157980.	33543169.	43336077.	35899126.	28105569.	175041921
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	276,771.	360,800.	413,999.	526,312.	577,303.	2155185.
9 Net income from unrelated business activities, whether or not the business is regularly carried on			33,449.	48,274.		81,723.
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						177278829
12 Gross receipts from related activities, etc. (see instructions)					12	3,240,548.
13 First five 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						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

14 Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f))	14	90.93 %
15 Public support percentage from 2017 Schedule A, Part II, line 14	15	91.30 %
16a 33 1/3% support test - 2018. 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		<input checked="" type="checkbox"/>
b 33 1/3% support test - 2017. 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		<input type="checkbox"/>
17a 10% -facts-and-circumstances test - 2018. 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		<input type="checkbox"/>
b 10% -facts-and-circumstances test - 2017. 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		<input type="checkbox"/>
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		<input type="checkbox"/>

Schedule A (Form 990 or 990-EZ) 2018

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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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 in 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 five 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 2018 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2017 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2018 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2017 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests - 2018. 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 - 2017. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐ ►

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>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.</i>		
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer (b) and (c) below.</i>		
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)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
4a Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.</i>		
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>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.</i>		
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)? <i>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.</i>		
5a Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer (b) and (c) 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).</i>		
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? <i>If "Yes," provide detail in Part VI.</i>		
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? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
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))? <i>If "Yes," provide detail in Part VI.</i>		
b Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
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)? <i>If "Yes," answer 10b below.</i>		
b Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
2 Activities Test. Answer (a) and (b) 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.			
2a			
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
2b			
3 Parent of Supported Organizations. Answer (a) and (b) 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? Provide details in Part VI .			
3a			
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.			
3b			

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

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

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

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (explain in detail in Part VI):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% 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 .035	6	
7	Recoveries of prior-year distributions	7	
8	Minimum Asset Amount (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<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 or 990-EZ) 2018

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	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI). See instructions.	
7 Total annual distributions. Add lines 1 through 6.	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	
9 Distributable amount for 2018 from Section C, line 6	
10 Line 8 amount divided by line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2018	(iii) Distributable Amount for 2018
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required- explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2018			
a From 2013			
b From 2014			
c From 2015			
d From 2016			
e From 2017			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from 3f.			
4 Distributions for 2018 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder. Subtract lines 4a and 4b from 4.			
5 Remaining underdistributions for years prior to 2018, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI . See instructions.			
6 Remaining underdistributions for 2018. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI . See instructions.			
7 Excess distributions carryover to 2019. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2014			
b Excess from 2015			
c Excess from 2016			
d Excess from 2017			
e Excess from 2018			

Schedule A (Form 990 or 990-EZ) 2018

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 B

(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2018

Name of the organization

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

General Rule

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

Special Rules

- ☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization

Employer identification number

UNITED WAY OF THE BAY AREA

94-1312348

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 770,462.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2		\$ 2,000,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3		\$ 970,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

94-1312348

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____

Name of organization

Employer identification number

UNITED WAY OF THE BAY AREA**94-1312348****Part III**

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527
▶ **Complete if the organization is described below.** ▶ **Attach to Form 990 or Form 990-EZ.**
▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2018

**Open to Public
Inspection**

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

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

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

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

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

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

Name of organization

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

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

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

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

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No
- 4a Was a correction made? ☐ Yes ☐ No
- b If "Yes," describe in Part IV.

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

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$
- 3 Total exempt function expenditures. Add lines 1 and 2. Enter here and on Form 1120-POL, line 17b ▶ \$
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments. For each organization listed, enter the amount paid from the filing organization's funds. Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

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

Schedule C (Form 990 or 990-EZ) 2018

LHA

832041 11-08-18

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

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

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

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)		1,526.													
b Total lobbying expenditures to influence a legislative body (direct lobbying)		27,521.													
c Total lobbying expenditures (add lines 1a and 1b)		29,047.													
d Other exempt purpose expenditures		28,910,539.													
e Total exempt purpose expenditures (add lines 1c and 1d)		28,939,586.													
f Lobbying nontaxable amount. Enter the amount from the following table in both columns.		1,000,000.													
<table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>	If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.			
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
g Grassroots nontaxable amount (enter 25% of line 1f)		250,000.													
h Subtract line 1g from line 1a. If zero or less, enter -0-		0.													
i Subtract line 1f from line 1c. If zero or less, enter -0-		0.													
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?			<input type="checkbox"/> Yes <input type="checkbox"/> No												

4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below.

See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2015	(b) 2016	(c) 2017	(d) 2018	(e) Total
2a Lobbying nontaxable amount	1,000,000.	1,000,000.	1,000,000.	1,000,000.	4,000,000.
b Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000.
c Total lobbying expenditures	16,828.	46,117.	28,537.	29,047.	120,529.
d Grassroots nontaxable amount	250,000.	250,000.	250,000.	250,000.	1,000,000.
e Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000.
f Grassroots lobbying expenditures	9,599.	9,717.	8,662.	1,526.	29,504.

Schedule C (Form 990 or 990-EZ) 2018

SCHEDULE D
(Form 990)Department of the Treasury
Internal Revenue Service**Supplemental Financial Statements**▶ **Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**
▶ **Attach to Form 990.**▶ **Go to www.irs.gov/Form990 for instructions and the latest information.**

OMB No. 1545-0047

2018**Open to Public
Inspection****Name of the organization**

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

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	21	0
2 Aggregate value of contributions to (during year)	1,168,121.	0.
3 Aggregate value of grants from (during year)	1,110,860.	0.
4 Aggregate value at end of year	156,693.	0.
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 checked="" 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 checked="" 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).
☐ Preservation of land for public use (e.g., recreation or education) ☐ Preservation of a historically important land area
☐ Protection of natural habitat ☐ Preservation of a certified historic structure
☐ Preservation of open space
- 2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.
- | | Held at the End of the Tax Year |
|--|---------------------------------|
| a Total number of conservation easements | 2a |
| b Total acreage restricted by conservation easements | 2b |
| c Number of conservation easements on a certified historic structure included 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 SFAS 116 (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 SFAS 116 (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 SFAS 116 (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) 2018

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

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

- a ☐ Public exhibition d ☐ Loan or exchange programs
 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	5,208,751.	5,061,854.	4,648,599.	5,022,885.	5,254,646.
b Contributions	1,656.	1,400.	1,300.	1,400.	1,400.
c Net investment earnings, gains, and losses	266,882.	366,395.	630,428.	-150,974.	-12,314.
d Grants or scholarships					
e Other expenditures for facilities and programs	201,426.	197,406.	196,906.	199,384.	194,752.
f Administrative expenses	23,043.	23,492.	21,567.	20,867.	26,095.
g End of year balance	5,252,820.	5,208,751.	5,061,854.	4,653,060.	5,022,885.

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

- a Board designated or quasi-endowment ☒ .00 %
 b Permanent endowment ☒ 74.21 %
 c Temporarily restricted endowment ☒ 25.79 %

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)		X
3a(ii)		X
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		377,040.	270,022.	107,018.
d Equipment		220,684.	149,533.	71,151.
e Other		1,640,148.	1,387,628.	252,520.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				430,689.

Schedule D (Form 990) 2018

Part VII Investments - Other Securities.

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

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

Part VIII Investments - Program Related.

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

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. (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)	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	

Part X Other Liabilities.

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

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

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

Schedule D (Form 990) 2018

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	17,105,020.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	133,809.
b	Donated services and use of facilities	2b	545,542.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	
e	Add lines 2a through 2d	2e	679,351.
3	Subtract line 2e from line 1	3	16,425,669.
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	67,311.
b	Other (Describe in Part XIII.)	4b	13,807,946.
c	Add lines 4a and 4b	4c	13,875,257.
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	30,300,926.

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	17,930,617.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	545,542.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	-936,974.
e	Add lines 2a through 2d	2e	-391,432.
3	Subtract line 2e from line 1	3	18,322,049.
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	67,311.
b	Other (Describe in Part XIII.)	4b	13,807,946.
c	Add lines 4a and 4b	4c	13,875,257.
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	32,197,306.

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 V, LINE 4:

ENDOWMENTS ARE USED FOR PERMANENTLY OR TEMPORARILY AND UNRESTRICTED
PURPOSES ACCORDING TO THE INTENT OF THE DONOR.

PART X, LINE 2:

UWBA IS EXEMPT FROM FEDERAL INCOME TAX UNDER SECTION 501(C)(3) OF THE
INTERNAL REVENUE CODE ("IRC") AND SECTION 23701D OF THE CALIFORNIA REVENUE
AND TAXATION CODE EXCEPT TO THE EXTENT OF UNRELATED BUSINESS TAXABLE
INCOME AS DEFINED UNDER IRC SECTIONS 511 THROUGH 515. HOWEVER, AS A RESULT
OF THE PASSAGE OF THE TAX CUTS AND JOBS ACT AS OF JANUARY 1, 2018,
NONPROFIT EMPLOYERS HAVE TO PAY 21% UNRELATED BUSINESS INCOME TAX ON
TRANSPORTATION FRINGE BENEFITS (I.E. PARKING AND TRANSIT PASSES) PROVIDED

Part XIII Supplemental Information (continued)

TO EMPLOYEES. SINCE UWBA HAS IMMATERIAL UNRELATED BUSINESS TAXABLE INCOME,
NO PROVISION FOR INCOME TAXES HAS BEEN PROVIDED IN THESE FINANCIAL
STATEMENTS. UWBA HAS NO UNRECOGNIZED TAX BENEFITS OR UNCERTAIN TAX
POSITIONS AS OF JUNE 30, 2019 AND 2018.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED PLEDGES 13,807,946.

PART XII, LINE 2D - OTHER ADJUSTMENTS:

PENSION RELATED CHANGES OTHER THAN NET PERIODIC PENSION
COST -937,174.

UNCOLLECTIBLE PLEDGES 200.

TOTAL TO SCHEDULE D, PART XII, LINE 2D -936,974.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED PLEDGES 13,807,946.

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 for the latest information.**

OMB No. 1545-0047

2018

**Open to Public
Inspection**

Name of the organization

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

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 non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
ADVENT LUTHERAN CHURCH MORGAN HILL PO BOX 607 MORGAN HILL, CA 95038	77-0011232	501(C)(3)	12,860.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AIDS LEGAL REFERRAL PANEL 1663 MISSION STREET, STE 500 SAN FRANCISCO, CA 94103	94-3111738	501(C)(3)	7,471.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ALISA ANN RUCH BURN FOUNDATION 4534 MISSION STREET, SUITE 5 SAN FRANCISCO, CA 94112	23-7162017	501(C)(3)	5,720.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AMERICAN CANCER SOCIETY, INC. CALIFORNIA - 1001 MARINA VILLAGE PARKWAY, SUITE 300 - ALAMEDA, CA 94501	13-1788491	501(C)(3)	10,415.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AMERICAN CONSERVATORY THEATER 30 GRANT AVENUE, 7TH FLOOR SAN FRANCISCO, CA 94108	94-6135772	501(C)(3)	8,820.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AMERICAN RED CROSS, BAY AREA CHAPTER - 1663 MARKET STREET - SAN FRANCISCO, CA 94103	53-0196605	501(C)(3)	14,936.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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

▶ **250.**

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

▶ **0.**

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

Schedule I (Form 990) (2018)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
AMERICA'S BEST LOCAL CHARITIES 1100 LARKSPUR LANDING CIRCLE, STE 3 LARKSPUR, CA 94939	94-3042430	501(C)(3)	168,141.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ARC OF SAN FRANCISCO 1500 HOWARD STREET SAN FRANCISCO, CA 94103	94-1415287	501(C)(3)	15,309.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ARCHDIOCESE OF SAN FRANCISCO 1 PETER YORKE WAY SAN FRANCISCO, CA 94109	51-0219028	501(C)(3)	25,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ASIAN LAW CAUCUS INC 55 COLUMBUS AVENUE SAN FRANCISCO, CA 94111	94-2176139	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AT THE CROSSROADS 167 JESSIE STREET SAN FRANCISCO, CA 94105	27-2603924	501(C)(3)	6,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
AVALON ACADEMY 818 MAHLER ROAD BURLINGAME, CA 94010	20-1651912	501(C)(3)	9,643.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BARBARA & GERSON BAKAR FOUNDATION 201 FILBERT STREET, STE. 400 SAN FRANCISCO, CA 94133	20-5691977	501(C)(3)	7,863.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BAY AREA DISCOVERY MUSEUM 557 MCREYNOLDS ROAD SAUSALITO, CA 94965	68-0033227	501(C)(3)	6,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BAY AREA LEGAL AID 1735 TELEGRAPH AVENUE OAKLAND, CA 94612	94-1631316	501(C)(3)	10,360.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
BISHOP'S RANCH OF THE DIOCESE OF CALIF - 5297 WESTSIDE ROAD - HEALDSBURG, CA 95448	94-1156840	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BLACK GIRLS CODE INC P.O.BOX 640926 SAN FRANCISCO, CA 94164	45-4930539	501(C)(3)	5,010.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BOYS & GIRLS CLUBS OF AMERICA 1275 PEACHTREE STREET NW ATLANTA, GA 30309	13-5562976	501(C)(3)	18,068.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
BREAST CANCER ALLIANCE 48 MAPLE AVENUE GREENWICH, CT 06830	61-4535000	501(C)(3)	9,889.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CAMP TAYLOR 8224 W. GRAYSON ROAD MODESTO, CA 95358	43-7091770	501(C)(3)	9,753.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CARONDELET HIGH SCHOOL 1133 WINTON DRIVE CONCORD, CA 94518	94-3333365	501(C)(3)	22,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CATHOLIC CHARITIES OF THE EAST BAY 433 JEFFERSON STREET OAKLAND, CA 94607	94-2677202	501(C)(3)	8,588.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CHILDRENS CREATIVITY MUSEUM 221 FOURTH STREET SAN FRANCISCO, CA 94103	94-3178735	501(C)(3)	19,778.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CHILDREN'S TRUST FUND SANTA CLARA COUNTY - 373 W JULIAN STREET - SAN JOSE, CA 95110	94-6000533	501(C)(3)	11,378.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
CHINATOWN COMMUNITY CHILDREN'S CENTER - 979 CLAY STREET - SAN FRANCISCO, CA 94108	23-7126354	501(C)(3)	5,200.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CHURCH OF JESUS CHRIST LDS CORPORATION - 50 E NORTH TEMPLE STREET - SALT LAKE CITY, UT 84150	87-0234341	501(C)(3)	32,532.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CHURCH OF THE NATIVITY 210 OAK GROVE AVENUE MENLO PARK, CA 94025	00-0000000	501(C)(3)	125,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CIRCLE OF CARE 303 VAN BUREN AVENUE OAKLAND, CA 94610	94-1358309	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CITY TEAM MINISTRIES OF SAN FRANCISCO - 164 6TH STREET - SAN FRANCISCO, CA 94103	51-0163302	501(C)(3)	10,537.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
CITYTEAM SAN JOSE 2306 ZANKER ROAD SAN JOSE, CA 95131	94-1501265	501(C)(3)	11,827.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
COMMONWEALTH CLUB OF CALIFORNIA 110 THE EMBARCADERO SAN FRANCISCO, CA 94105	94-0399260	501(C)(3)	26,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
COMMUNITY HEALTH CHARITIES OF CALIFORNIA - 1199 N. FAIRFAX ST. STE. 600 - ALEXANDRIA, VA 22314	13-6167225	501(C)(3)	141,115.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
COMPASS FAMILY SERVICES 49 POWELL STREET, 3RD FLOOR SAN FRANCISCO, CA 94102	94-1156622	501(C)(3)	26,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
CONSERVATION CORPS NORTH BAY 27 LARKSPUR ST SAN RAFAEL, CA 94901	94-2831592	501(C)(3)	7,599.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
DE LA SALLE HIGH SCHOOL 1130 WINTON DR (DEVELPMNT OFC) CONCORD, CA 94518	68-0311262	501(C)(3)	8,732.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
DFCS EDUCATION SCHOLARSHIP FUND 333 WEST JULIAN STREET SAN JOSE, CA 95110	94-6000533	501(C)(3)	6,287.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
DOCTORS WITHOUT BORDERS HEADQUARTER - 333 7TH AVENUE, 2ND FLOOR - NEW YORK, NY 10016	13-3433452	501(C)(3)	6,741.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
DON BOSCO SALESIAN MISSIONS 120 VILLAGE SQUARE, #44 ORINDA, CA 94563	00-0000000	501(C)(3)	5,250.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
EARTHSHARE CALIFORNIA 870 MARKET STREET, SUITE 703 SAN FRANCISCO, CA 94102	94-2840364	501(C)(3)	43,736.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
EAST BAY COMMUNITY LAW CENTER 1950 UNIVERSITY AVENUE, STE. 200 BERKELEY, CA 94704	94-3042565	501(C)(3)	19,447.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
EDGEWOOD CENTER FOR CHILDREN & FAMILIES - 1801 VICENTE STREET - SAN FRANCISCO, CA 94116	94-1186168	501(C)(3)	28,641.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
FAMILY HOUSE- SAN FRANCISCO 540 MISSION BAY BLVD., NORTH SAN FRANCISCO, CA 94158	94-2722663	501(C)(3)	25,219.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
FIRE ASSOCIATES OF SANTA CLARA VALLEY - P.O. BOX 494 - CAMPBELL, CA 95009	23-7087975	501(C)(3)	14,897.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
FOOD BANK OF CONTRA COSTA & SOLANO PO BOX 6324 CONCORD, CA 94524	94-2418054	501(C)(3)	32,052.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
FRESH LIFELINES FOR YOUTH/FLY 568 VALLEY WAY MILPITAS, CA 95035	52-2234595	501(C)(3)	9,472.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
GIFFORDS LAW CTR TO PREVENT GUN VIOLENCE - 268 BUCH STREET #555 - SAN FRANCISCO, CA 94104	46-4638549	501(C)(3)	6,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
GLOBAL IMPACT 1199 N FAIRFAX STREET, SUITE 300 ALEXANDRIA, VA 22314	52-1273585	501(C)(3)	44,652.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
GRATTAN ELEMENTARY SCHOOL PTA 165 GRATTAN STREET SAN FRANCISCO, CA 94111	94-2967138	501(C)(3)	5,700.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HABITAT FOR HUMANITY EAST BAY/SILICON - 2619 BROADWAY #205 - OAKLAND, CA 94612	94-3053687	501(C)(3)	7,310.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HABITAT FOR HUMANITY INTERNATIONAL 322 WEST LAMAR STREET AMERICUS, GA 31709	91-1914868	501(C)(3)	5,062.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HAMILTON FAMILIES 1631 HAYES STREET SAN FRANCISCO, CA 94117	94-3055602	501(C)(3)	35,024.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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HAMLIN SCHOOL 2120 BROADWAY SAN FRANCISCO, CA 94115	94-1393894	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HARVARD-CLASS OF 1992 SOLDIERS FIELD BOSTON, MA 02163	53-0199180	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HOSPICE OF THE VALLEY 4850 UNION AVENUE SAN JOSE, CA 95124	94-2788907	501(C)(3)	6,140.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
HUMANE SOCIETY SILICON VALLEY 901 AMES AVENUE MILPITAS, CA 95035	94-1196215	501(C)(3)	9,873.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
IMMIGRANT LEGAL RESOURCE CENTER 1663 MISSION ST #602 SAN FRANCISCO, CA 94103	94-2939540	501(C)(3)	5,765.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
J DAVID GLADSTONE INSTITUTES 1650 OWENS STREET SAN FRANCISCO, CA 94158	23-7203666	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
JEWISH FAMILY & COMMUNITY SERVICES 2484 SHATTUCK AVE #210 BERKELEY, CA 94704	94-3250304	501(C)(3)	5,340.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
JF KAPNEK CHARITABLE TRUST 936 DEWING AVENUE, SUITE E3 LAFAYETTE, CA 94549	23-7165692	501(C)(3)	50,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
JUBILEE CHRISTIAN CENTER 175 NORTECH PARKWAY SAN JOSE, CA 95134	77-0195311	501(C)(3)	7,266.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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JUNIOR ACHIEVEMENT NORTHERN CALIFORNIA - 3003 OAK ROAD, SUITE 130 - WALNUT CREEK, CA 94597	94-1322179	501(C)(3)	20,100.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
JUSTICE & DIVERSITY CENTER OF THE BAR - 301 BATTERY STREET, THIRD FLOOR - SAN FRANCISCO, CA 94111	94-2931349	501(C)(3)	15,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
KIPP BAY AREA SCHOOLS 1404 FRANKLIN STREET, SUITE 500 OAKLAND, CA 94612	20-5010766	501(C)(3)	16,259.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
KQED INC 2601 MARIPOSA ST SAN FRANCISCO, CA 94110	94-1241309	501(C)(3)	10,196.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
LARKIN STREET YOUTH SERVICES 134 GOLDEN GATE AVENUE SAN FRANCISCO, CA 94102	94-2917999	501(C)(3)	6,819.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
LAWYERS COMMITTEE FOR CIVIL RIGHTS- SF - 131 STEUART ST, STE 400 - SAN FRANCISCO, CA 94105	94-2581415	501(C)(3)	48,100.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
LEGAL AID AT WORK 180 MONTGOMERY STREET, SUITE 600 SAN FRANCISCO, CA 94104	94-2783401	501(C)(3)	54,315.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
LOYOLA UNIVERSITY NEW ORLEANS 6363 SAINT CHARLES AVENUE NEW ORLEANS, LA 70118	72-0408946	501(C)(3)	10,217.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
MAKE A WISH FOUNDATION GREATER BAY AREA - 1333 BROADWAY, SUITE 200 - OAKLAND, CA 94612	94-2958481	501(C)(3)	13,403.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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MARIN ACADEMY 1600 MISSION AVE SAN RAFAEL, CA 94901	94-1186189	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
MICHAEL J. FOX FOUNDATION CHURCH STREET STATION NEW YORK, NY 10163	13-4141945	501(C)(3)	8,336.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
MILE HIGH UNITED WAY 711 PARK AVENUE WEST DENVER, CO 80205	84-0404235	501(C)(3)	6,469.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
MULTIPLYING GOOD 15 WEST 38TH STREET SUITE 1210 NEW YORK, NY 10018	52-0959336	501(C)(3)	20,250.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
NATURE CONSERVANCY 4245 NORTH FAIRFAX DR STE 100 ARLINGTON, VA 22203	53-0242652	501(C)(3)	5,866.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
NATURE CONSERVANCY OF CALIFORNIA, THE - 201 MISSION STREET, 4TH FLOOR - SAN FRANCISCO, CA 94105	53-0242652	501(C)(3)	6,138.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
NEUROEDOCRINE TUMOR RESEARCH FDN 321 COLUMBUS AVENUE, SUITE 5R BOSTON, MA 02116	20-1945347	501(C)(3)	8,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
NEXT DOOR SOLUTIONS TO DOMESTIC VIOLENCE - 234 EAST GISH ROAD, #200 - SAN JOSE, CA 95112	94-2420708	501(C)(3)	6,535.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
NUEVA SCHOOL 6565 SKYLINE BLVD. HILLSBOROUGH, CA 94010	94-1633387	501(C)(3)	15,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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OAK HILLS BAPTIST CHURCH 1100 BLUE RAVINE RD FOLSOM, CA 95630	68-0083157	501(C)(3)	17,915.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
OAKLAND MUSEUM OF CALIFORNIA FOUNDATION - 1000 OAK STREET, DEVELOPMENT - OAKLAND, CA 94607	94-3094513	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ONEJUSTICE 433 CALIFORNIA STREET, SUITE 815 SAN FRANCISCO, CA 94104	94-2589423	501(C)(3)	12,780.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
OPERATION FREEDOM PAWS 777 FIRST STREET, PMB 515 GILROY, CA 95020	45-2566382	501(C)(3)	7,306.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
PHILADELPHIA MUSEUM OF ART PO BOX 7646 PHILADELPHIA, PA 19101	23-1365388	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
PLANNED PARENTHOOD FEDERATION 123 WILLIAM STREET, 10TH FLOOR NEW YORK, NY 10038	13-1644147	501(C)(3)	5,181.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
PLAYWRIGHTS FOUNDATION 1616 16TH STREET, SUITE 350 SAN FRANCISCO, CA 94103	94-2565759	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
PUBLIC ADVOCATES 131 STEUART STREET, SUITE 300 SAN FRANCISCO, CA 94105	23-7103042	501(C)(3)	6,300.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
REBEKAH CHILDRENS SERVICES 290 I.O.O.F. AVENUE GILROY, CA 95020	94-1167402	501(C)(3)	22,991.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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SAFE & SOUND 1757 WALLER ST SAN FRANCISCO, CA 94117	94-2455072	501(C)(3)	6,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SAN FRANCISCO MARIN FOOD BANK 900 PENNSYLVANIA AVE SAN FRANCISCO, CA 94107	94-3041517	501(C)(3)	6,617.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SAN FRANCISCO SPCA 201 ALABAMA STREET SAN FRANCISCO, CA 94103	94-0836580	501(C)(3)	5,216.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SANTA CLARA COUNTY ANIMAL SHELTER 1555 BERGER DRIVE SAN JOSE, CA 95112	94-6000533	501(C)(3)	31,543.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SANTA CLARA COUNTY MEALS ON WHEELS 333 WEST JULIAN STREET SAN JOSE, CA 95110	94-6000533	501(C)(3)	14,217.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SECOND HARVEST OF SILICON VALLEY 750 CURTNER AVENUE SAN JOSE, CA 95125	94-2614101	501(C)(3)	48,584.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SELF HELP FOR THE ELDERLY 731 SANSOME STREET, SUITE 100 SAN FRANCISCO, CA 94111	94-1750717	501(C)(3)	5,219.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SHEN YUN PERFORMING ARTS 140 GALLEY HILL ROAD CUDDEBACKVILLE, NY 12729	20-8812402	501(C)(3)	8,102.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SHIPLEY SCHOOL 814 YARROW STREET BRYN MAWR, PA 19010	23-1352677	501(C)(3)	30,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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SILICON VALLEY CREATES 38 W. SANTA CLARA ST. SAN JOSE, CA 95113	94-2825213	501(C)(3)	13,694.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SMILE TRAIN INC 41 MADISON AVENUE, #28TH FLOOR NEW YORK, NY 10010	13-3661416	501(C)(3)	8,699.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SPCA OF SOLANO COUNTY PO BOX 356 VACAVILLE, CA 95696	94-2607843	501(C)(3)	5,733.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST BASIL THE GREAT GREEK ORTHODOX CHURCH - 6430 BOSE LANE - SAN JOSE, CA 95120	00-0000000	501(C)(3)	5,375.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST DOMINICS CATHOLIC CHURCH 2390 BUSH STREET SAN FRANCISCO, CA 94115	00-0000000	501(C)(3)	10,578.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST MARY CATHOLIC CHURCH 2051 MT DIABLO BLVD WALNUT CREEK, CA 94596	00-0000000	501(C)(3)	7,100.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST MARY-VIRGIN EPISCOPAL CHURCH 2325 UNION STREET SAN FRANCISCO, CA 94123	00-0000000	501(C)(3)	10,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST STEPHENS EPISCOPAL CHURCH-ORINDA - 66 ST STEPHENS DRIVE - ORINDA, CA 94563	94-1399270	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ST. ANTHONY FOUNDATION 150 GOLDEN GATE AVENUE SAN FRANCISCO, CA 94102	94-1513140	501(C)(3)	11,242.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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ST. JUDE CHILDRENS RESEARCH HOSPITAL - 501 ST JUDE PLACE - MEMPHIS, TN 38105	62-0646012	501(C)(3)	15,903.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
STANFORD UNIVERSITY P.O. BOX 20466 STANFORD, CA 94309	94-1156365	501(C)(3)	23,233.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
SUMMER SEARCH 101 HOWARD STREET, SUITE 250 SAN FRANCISCO, CA 94105	68-0200138	501(C)(3)	10,784.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
THE FATHERS HOUSE 126 PEABODY ROAD VACAVILLE, CA 95687	68-0408159	501(C)(3)	10,481.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
THE TABLE AT CENTRAL UMC 5265 H STREET SACRAMENTO, CA 95819	68-0003355	501(C)(3)	13,555.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
TRIPS FOR KIDS MARIN 610 4TH STREET SAN RAFAEL, CA 94901	68-0159458	501(C)(3)	5,549.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UC REGENTS/UC BERKELEY 1995 UNIVERSITY AVENUE, SUITE 400 BERKELEY, CA 94704-1070	94-6002123	501(C)(3)	18,500.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UCSF BENIOFF CHILDRENS HOSPITAL PO BOX 45339 SAN FRANCISCO, CA 94145	94-1657474	501(C)(3)	7,188.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UCSF FOUNDATION BOX 45339 SAN FRANCISCO, CA 94145	94-2829914	501(C)(3)	10,525.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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UNITED WAY CALIFORNIA CAPITAL REGION - 10389 OLD PLACERVILLE ROAD - SACRAMENTO, CA 95827	94-1225382	501(C)(3)	17,012.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNITED WAY MONTEREY COUNTY 60 GARDEN COURT, SUITE 350 MONTEREY, CA 93940	94-1322169	501(C)(3)	12,899.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNITED WAY NORTHERN CALIF BUTTE CO FIRE - PO BOX 990248 - REDDING, CA 96099	94-1251675	501(C)(3)	203,711.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNITED WAY OF GREATER ATLANTA P.O. BOX 2692 ATLANTA, GA 30301	58-0566194	501(C)(3)	6,146.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNITED WAY OF GREATER UNION COUNTY 33 W GRAND STREET ELIZABETH, NJ 07202	22-1904427	501(C)(3)	10,688.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNITED WAY VENTURA/LOS ANGELES WILDFIRES - 1150 S. OLIVE STREET, SUITE T500 - LOS ANGELES, CA 90015	95-2274801	501(C)(3)	40,980.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
UNIVERSITY OF SOUTHERN CALIFORNIA 1150 SOUTH OLIVE STREET, 25TH FLOOR LOS ANGELES, CA 90015	95-1642394	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
URBAN SCHOOL OF SAN FRANCISCO 1563 PAGE ST SAN FRANCISCO, CA 94117	94-1622034	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
USA CYCLING, INC. 210 USA CYCLING POINT, SUITE 100 COLORADO SPRINGS, CO 80919	84-1284437	501(C)(3)	25,983.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS

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VMC FOUNDATION - BOOSTER SHOT PROGRAM - 2400 CLOVE DRIVE - SAN JOSE, CA 95128	77-0187890	501(C)(3)	158,330.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
WESTERN CENTER ON LAW & POVERTY 3701 WILSHIRE BLVD, STE 208 LOS ANGELES, CA 90010	95-2897721	501(C)(3)	8,253.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
WILDAID 333 PINE STREET, SUITE 300 SAN FRANCISCO, CA 94104	20-3644441	501(C)(3)	5,038.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
WILLIAMS COLLEGE PO BOX 67 WILLIAMSTOWN, MA 01267	42-1048470	501(C)(3)	5,238.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
WOODSIDE SCHOOL FOUNDATION 3195 WOODSIDE ROAD WOODSIDE, CA 94062	94-2928552	501(C)(3)	15,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
WOUNDED WARRIOR PROJECT PO BOX 758517 TOPEKA, KS 66675	20-2370934	501(C)(3)	15,401.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ZEPHYR INSTITUTE 560 COLLEGE AVENUE PALO ALTO, CA 94306	47-1979289	501(C)(3)	20,000.	0.			DESIGNATED BY DONOR TO AGENCY FOR GENERAL OPERATIONS
ALAMEDA COUNTY SOCIAL SVCS AGENCY 2000 SAN PABLO AVENUE, 4TH FLOOR OAKLAND, CA 94612	94-6000501	501(C)(3)	24,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
ALLEN TEMPLE BAPTIST CHURCH 8501 INTERNATIONAL BLVD. OAKLAND, CA 94621	94-1747125	501(C)(3)	8,300.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

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Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
AMIGOS DE GUADALUPE CENTER FOR JUSTICE & EMPOWERMENT - 1897 ALUM ROCK AVENUE, STE 35 - SAN JOSE, CA 95116	77-0555838	501(C)(3)	10,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
ASIAN INC 1167 MISSION STREET, 4TH FLOOR SAN FRANCISCO, CA 94103	94-1753170	501(C)(3)	5,250.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
ASIAN PACIFIC AMERICAN COMMUNITY CENTER - 66 RAYMOND AVENUE - SAN FRANCISCO, CA 94134	94-3357710	501(C)(3)	7,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
BAY AREA COMMUNITY RESOURCES 171 CARLOS DRIVE SAN RAFAEL, CA 94903	94-2346815	501(C)(3)	122,917.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
BAYVIEW HUNTERS POINT YMCA 1601 LANE STREET SAN FRANCISCO, CA 94124	94-0997140	501(C)(3)	6,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
BENICIA COMMUNITY ACTION COUNCIL 480 MILITARY EAST BENICIA, CA 94510	68-0294153	501(C)(3)	7,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
BUILDING SKILLS PARTNERSHIP 828 W WASHINGTON BLVD LOS ANGELES, CA 90015	26-1254255	501(C)(3)	8,750.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
CALIFORNIA FORWARD C/O LEVENTHAL KLINE - 127 UNIVERSITY AVENUE - BERKELEY, CA 94710	26-0566540	501(C)(3)	26,668.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
CATHOLIC CHARITIES OF SANTA CLARA COUNTY - 2625 ZANKER ROAD - SAN JOSE, CA 95134	94-2762269	501(C)(3)	63,896.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
CATHOLIC CHARITIES OF SOLANO INC 125 CORPORATE PLACE, SUITE A VALLEJO, CA 94590	94-2576612	501(C)(3)	7,700.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
CHABOT-LAS POSITAS COMMUNITY COLLEGE DISTRICT - 7600 DUBLIN BLVD., 3RD FLOOR - DUBLIN, CA 94568	94-1670563	501(C)(3)	18,400.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
CHILDREN'S NETWORK OF SOLANO COUNTY - 2320 COURAGE DRIVE, SUITE 107 - FARIFIELD, CA 94533	68-0014506	501(C)(3)	437,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
CHINESE NEWCOMERS SERVICE CENTER 777 STOCKTON STREET, #104 SAN FRANCISCO, CA 94108	94-2152893	501(C)(3)	48,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
CITY OF SOUTH SAN FRANCISCO PROJECT READ - 840 WEST ORANGE AVENUE - SOUTH SAN FRANCISCO, CA 94080	94-6000435	501(C)(3)	13,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
COASTSIDE HOPE 99 AVENUE ALHAMBRA EL GRANADA, CA 94018	51-0199747	501(C)(3)	9,100.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
COMMUNITY ACTION MARIN 29 MARY STREET SAN RAFAEL, CA 94901	94-6136365	501(C)(3)	369,450.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
COMMUNITY ACTION NAPA VALLEY 2310 LAUREL STREET, SUITE 1 NAPA, CA 94559	94-1610851	501(C)(3)	30,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
COMMUNITY CHILD CARE COORDINATING CNCL OF ALAMEDA - 22351 CITY CENTER DRIVE, SUITE 100 - HAYWARD, CA 94541	23-7218859	501(C)(3)	19,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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 LIVING CAMPAIGN 1360 MISSION STREET, SUITE 400 SAN FRANCISCO, CA 94103	26-1697250	501(C)(3)	114,485.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
COMMUNITY SERVICES AGENCY OF MOUNTAIN VIEW - 204 STIERLIN ROAD - MOUNTAIN VIEW, CA 94043	94-1422465	501(C)(3)	50,365.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
COMMUNITY YOUTH CENTER OF SF 1038 POST STREET SAN FRANCISCO, CA 94109	94-1728818	501(C)(3)	77,083.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
COMPASSPOINT NONPROFIT SERVICES 500 - 12TH STREET, SUITE 320 OAKLAND, CA 94607	93-1196632	501(C)(3)	5,500.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
CONTRA COSTA CRISIS CENTER P.O. BOX 3364 WALNUT CREEK, CA 94598	94-1747227	501(C)(3)	65,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
EAST BAY ASIAN LOCAL DEVELOPMENT CORP - 1825 SAN PABLO AVE., SUITE 200 - OAKLAND, CA 94612	51-0171851	501(C)(3)	368,600.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
EDEN I AND R INC 570 B STREET HAYWARD, CA 94541	94-2339050	501(C)(3)	90,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
FREMONT FAMILY RESOURCE CENTER CORP - 39155 LIBERTY STREET, SUITE A110 - FREMONT, CA 94537	94-3333831	501(C)(3)	128,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
GOLDEN STATE OPPORTUNITY FOUNDATION - 10877 WILSHIRE BLVD., SUITE 708 - LOS ANGELES, CA 90024	47-4325738	501(C)(3)	118,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
GREATER NAPA FAIR HOUSING CENTER 1804 SOSCOL AVENUE, SUITE 203 NAPA, CA 94559	42-1576121	501(C)(3)	77,500.	0.			PROGRAM GRANT TO SUPPORT NAPA WILDFIRE RELIEF FUND
HAYWARD AREA RECREATION AND PARK DISTRICT (HARD) - 1099 E STREET - HAYWARD, CA 94541	94-6000728	501(C)(3)	9,800.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
HELIA MORENO 1125 FIRST STREET FAIRFIELD, CA 94533	63-6288320	501(C)(3)	15,700.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
HIGH EXPECTATIONS PARENTAL SERVICES LLC - 333 HEGENBERGER ROAD, SUITE 309 - OAKLAND, CA 94621	27-0903541	501(C)(3)	6,500.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
INSIGHT CENTER FOR COMMUNITY ECONOMIC DEVELOPMENT - 360 - 14TH STREET, SUITE 500A - OAKLAND, CA 94612	94-2410277	501(C)(3)	31,800.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
INTERFACE CHILDREN FAMILY SERVICES 4001 MISSION OAKS BLVD., SUITE I CAMARILLO, CA 93012-5121	95-2944459	501(C)(3)	691,733.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
JAPANESE COMMUNITY YOUTH COUNCIL 2012 PINE STREET SAN FRANCISCO, CA 94115	23-7092514	501(C)(3)	96,240.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
JESUS FLORES 250 MERRYDALE ROAD, APT 6 SAN RAFAEL, CA 94903	60-2168886	501(C)(3)	18,100.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
JEWISH VOCATIONAL SERVICES 225 BUSH STREET, SUITE 400 SAN FRANCISCO, CA 94104	94-2213100	501(C)(3)	73,333.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
LAO FAMILY COMMUNITY DEVELOPMENT INC. - 2325 EAST 12TH STREET - OAKLAND, CA 94601	94-3115164	501(C)(3)	20,700.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
LIFEMOVES 181 CONSTITUTION DRIVE MENLO PARK, CA 94025	77-0160469	501(C)(3)	66,743.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
MISSION ECONOMIC DEVELOPMENT AGENCY - 2301 MISSION STREET, SUITE 301 - SAN FRANCISCO, CA 94110	51-0187791	501(C)(3)	226,083.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
NEW DOOR VENTURES 3221 - 20TH STREET SAN FRANCISCO, CA 94110	94-2780274	501(C)(3)	100,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
NORTHEAST COMMUNITY FEDERAL CREDIT UNION - 683 CLAY STREET - SAN FRANCISCO, CA 94111	94-2891498	501(C)(3)	22,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
ON THE MOVE 780 LINCOLN AVENUE NAPA, CA 94558	75-3149095	501(C)(3)	133,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
ONE TREASURE ISLAND 1 AVENUE OF THE PALMS, ROOM 166 SAN FRANCISCO, CA 94130	94-3280624	501(C)(3)	8,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
OPPORTUNITY JUNCTION 3102 DELTA FAIR BOULEVARD ANTIOCH, CA 94509	68-0459131	501(C)(3)	6,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
PACIFICA RESOURCE CENTER 1809 PALMETTO AVENUE PACIFICA, CA 94044	81-1496989	501(C)(3)	7,700.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
PHILANTHROPIC VENTURES FOUNDATION 1222 PRESERVATON PARK WAY OAKLAND, CA 94612-1201	94-3136771	501(C)(3)	7,650.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
PLANNED PARENTHOOD MAR MONTE INC KIDS IN COMMON - 1605 THE ALAMEDA - SAN JOSE, CA 95050	94-1583439	501(C)(3)	65,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
PUENTE DE LA COSTA SUR P.O. BOX 554 PESCADERO, CA 94060	37-1484262	501(C)(3)	6,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
PUERTAS ABIERTAS COMMUNITY RESOURCE CENTER - 952 NAPA STREET - NAPA, CA 94559	20-3126333	501(C)(3)	9,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
REDWOOD CITY SCHOOL DISTRICT 750 BRADFORD STREET REDWOOD CITY, CA 94063	94-3084018	501(C)(3)	131,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
RENAISSANCE ENTREPRENEURSHIP CENTER - 275 5TH STREET - SAN FRANCISCO, CA 94103	94-2793122	501(C)(3)	9,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
RICHMOND COMMUNITY FOUNDATION 1014 FLORIDA AVENUE, SUITE 200 RICHMOND, CA 94804	94-3337754	501(C)(3)	892,800.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
RUBICON PROGRAMS, INC 2500 BISSELL AVENUE RICHMOND, CA 94804	94-2301550	501(C)(3)	13,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SACRED HEART COMMUNITY SERVICE 1381 SOUTH FIRST STREET SAN JOSE, CA 95110	23-7179787	501(C)(3)	230,982.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
SAMARITAN HOUSE 4031 PACIFIC BLVD., 3RD FLOOR SAN MATEO, CA 94403	23-7416272	501(C)(3)	10,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SAN ANTONIO COMMUNITY DEVELOPMENT CORP - 2228 EAST 15TH STREET - OAKLAND, CA 94606	94-2675448	501(C)(3)	30,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SAN FRANCISCO COMMUNITY EMPOWERMENT CTR - 2798 SAN BRUNO AVENUE - SAN FRANCISCO, CA 94134	20-4121042	501(C)(3)	7,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SAN FRANCISCO HOUSING DEVELOPMENT CORPORATION - 4439 THIRD STREET - SAN FRANCISCO, CA 94124	94-3090854	501(C)(3)	10,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SAN FRANCISCO UNIFIED SCHOOL DISTRICT - 555 FRANKLIN STREET - SAN FRANCISCO, CA 94102	94-6000416	501(C)(3)	44,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
SAN JOSE CITY COLLEGE 2100 MOORPARK AVENUE SAN JOSE, CA 95128	77-0100756	501(C)(3)	6,000.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
SAN JOSE/EVERGREEN COMMUNITY COLLEGE DISTRICT - 40 SOUTH MARKET STREET - SAN JOSE, CA 95113	77-0100756	501(C)(3)	259,695.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
SAN MATEO COUNTY COMMUNITY COLLEGE DISTRICT SKYLINE COLLEGE - 3401 CSM DRIVE - SAN MATEO, CA 94402	94-3084147	501(C)(3)	250,350.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
SELF-HELP ECONOMIC DEVELOPMENT, INC - 1330 BROADWAY, SUITE 604 - OAKLAND, CA 94612	20-5330006	501(C)(3)	25,800.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
SPARK POINT EAST CONTRA COSTA 1014 FLORIDA AVENUE, SUITE 200 RICHMOND, CA 94804	94-6000509	501(C)(3)	9,700.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
ST JOSEPHS FAMILY CENTER 7950 CHURCH STREET, SUITE A GILROY, CA 95020	03-0391775	501(C)(3)	48,000.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
SUCCESS CENTER SAN FRANCISCO 375 WOODSIDE AVE., BLDG W-2 SAN FRANCISCO, CA 94127	94-2844443	501(C)(3)	92,917.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
SUNNYVALE COMMUNITY SERVICES 725 KIFER ROAD SUNNYVALE, CA 94086	94-1713897	501(C)(3)	57,920.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
TAX-AID 55 NEW MONTGOMERY ST., SUITE 500 SAN FRANCISCO, CA 94105	94-3062518	501(C)(3)	8,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
THE SALVATION ARMY-SANTA CLARA COUNTY - 359 NORTH 4TH ST - SAN JOSE, CA 95112	94-1156347	501(C)(3)	95,000.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
THE UNITY COUNCIL OF ALAMEDA COUNTY INC - 1900 FRUITVALE AVE, SUITE 2B - OAKLAND, CA 94601	94-1670490	501(C)(3)	16,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
THE WOMEN'S BUILDING-SF WOMENS CENTER INC. - 3543 - 18TH STREET - SAN FRANCISCO, CA 94110	94-1730620	501(C)(3)	16,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
TRAVIS CREDIT UNION P O BOX 2069 VACAVILLE, CA 95696	94-1242831	501(C)(3)	12,000.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES

Schedule I (Form 990)

Part II Continuation of Grants and Other Assistance to Governments and Organizations in the United States (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
UNITED WAY OF THE WINE COUNTRY 975 CORPORATE CENTER PARKWAY, SUITE SANTA ROSA, CA 95407	94-1669646	501(C)(3)	195,829.	0.			PROGRAM GRANT TO SUPPORT NAPA WILDFIRE RELIEF FUND
UP VALLEY FAMILY CENTERS OF NAPA COUNTY - 1440 SPRING STREET - SAINT HELENA, CA 94574	80-0023012	501(C)(3)	43,500.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
URBAN SERVICES YMCA 1426 FILLMORE STREET, SUITE 204 SAN FRANCISCO, CA 94115	94-0997140	501(C)(3)	45,833.	0.			PROGRAM GRANT TO SUPPORT ECONOMIC SUCCESS SERVICES
WEST VALLEY COMMUNITY SERVICES 10104 VISTA DRIVE CUPERTINO, CA 95014	94-2211685	501(C)(3)	160,000.	0.			PROGRAM GRANT TO SUPPORT EMERGENCY ASSISTANCE NETWORK
YMCA OF SAN FRANCISCO 50 CALIFORNIA STREET, SUITE 650 SAN FRANCISCO, CA 94111	94-0997140	501(C)(3)	42,323.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES
YOUNG COMMUNITY DEVELOPERS INC 1715 YOSEMITE AVENUE SAN FRANCISCO, CA 94124	94-2187776	501(C)(3)	77,083.	0.			PROGRAM GRANT TO SUPPORT OTHER COMMUNITY SERVICES

Part III

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

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

Part IV

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

PART I, LINE 2:

FUNDING ALLOCATED TO AGENCIES AS DIRECTED BY DONORS:

UNITED WAY OF THE BAY AREA RESPONSIBLY FULFILLS DONOR INTENT, INCLUDING

REQUESTS TO FUND SPECIFIC NONPROFITS THAT MEET THE IRS QUALIFICATIONS OF A

TAX EXEMPT CHARITABLE ORGANIZATION UNDER SECTION 170(C). ELIGIBLE

ORGANIZATIONS ARE ALSO REQUIRED TO BE IN COMPLIANCE WITH THE SPIRIT AND

INTENT OF THE USA PATRIOT ACT AND OTHER COUNTER TERRORISM LAWS.

ALLOCATIONS AND RE-GRANTS TO PARTNERS:

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest
Compensated Employees

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**

▶ **Attach to Form 990.**

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

OMB No. 1545-0047

2018

Open to Public
Inspection

Name of the organization

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

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 filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.

- | | |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee | <input type="checkbox"/> Written employment contract |
| <input checked="" 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? **4a**
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? **4b**
- c** Participate in, or receive payment from, an equity-based compensation arrangement? **4c**
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

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

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

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

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

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

7 For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described 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		X
4b		X
4c		X
5a		X
5b		X
6a		X
6b		X
7		X
8		X
9		

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

Schedule J (Form 990) 2018

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) WILSON, ANNE CHIEF EXECUTIVE OFFICER	(i)	364,284.	0.	12,096.	-84,303.	12,935.	305,012.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) BRAUN, JOAN CHIEF OPERATING OFFICER	(i)	221,749.	51.	7,024.	18,434.	39,758.	287,016.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) GOOCH, NORA CHIEF DEVELOPMENT OFFICER	(i)	203,916.	1,151.	1,053.	9,494.	8,544.	224,158.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(4) GRIFFIN, SIDNEY CHIEF MARKETING OFFICER	(i)	167,335.	277.	1,144.	8,121.	30,302.	207,179.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(5) BATSON, KELLY SENIOR VP, CIT	(i)	143,466.	51.	10,457.	9,038.	10,109.	173,121.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(6) JOSEPH, MEGAN EXECUTIVE DIRECTOR, RISE TOGETHER	(i)	132,946.	51.	10,871.	6,805.	19,685.	170,358.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(7) KUKOVIC, LIDIYA VP, CONTROLLER	(i)	118,213.	55.	7,439.	10,356.	19,655.	155,718.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(8) SCHAUER, JOHN VP, INFORMATION TECHNOLOGY	(i)	132,634.	54.	6,782.	6,463.	19,748.	165,681.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

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

SCHEDULE J, PART II, COLUMN C:

THE IRS DEFINES OTHER COMPENSATION, AS REPORTED ON SCHEDULE J TO
INCLUDE THE ANNUAL INCREASE IN THE ACTUARIAL VALUE OF A DEFINED BENEFIT
PLAN. THREE CURRENT DIRECTORS, OFFICERS OR KEY EMPLOYEES WERE PART OF
THE DEFINED BENEFITS PLAN: THE CEO, COO, AND VP, IT. FOR UWBA'S
PURPOSES, BOTH THE COMPANY PORTION OF THE CEO'S 401K EXPENSES \$23,783
AS WELL AS THE ANNUAL ACTUARIAL DECREASE IN VALUE OF THE NOW FROZEN
DEFINED BENEFIT PLAN (\$ 223,401), HAVE BEEN INCLUDED TO ARRIVE AT NET
DECREASE OF (\$ 84,303).

**SCHEDULE M
(Form 990)**

Department of the Treasury
Internal Revenue Service

Noncash Contributions

OMB No. 1545-0047

2018

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 for instructions and the latest information.**

Name of the organization

UNITED WAY OF THE BAY AREA

Employer identification number

94-1312348

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	31	614,023.	PROCEEDS FROM SALE
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 ▶ (TV)	X	1	898.	FMV
26 Other ▶ ()				
27 Other ▶ ()				
28 Other ▶ ()				

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

29

0

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?

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.

	Yes	No
30a		X
31		X
32a		X

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

Schedule M (Form 990) 2018

Part II

Supplemental Information.

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 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or 990-EZ or to provide any additional information.

▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

2018

Open to Public
Inspection

Name of the organization

UNITED WAY OF THE BAY AREA

Employer identification number

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FORM 990, PART I, LINE 6

VOLUNTEERS

VOLUNTEER NUMBER INCLUDES VOLUNTEERS WHO PROVIDE DIRECT SERVICE TO

UNITED WAY OF THE BAY AREA AS BOARD MEMBERS, VOLUNTEER TAX PREPARERS,

FUNDRAISERS AND CAMPAIGN COORDINATORS, ADVOCACY AND PUBLIC POLICY

VOLUNTEERS, AND VOLUNTEERS IN OTHER UNITED WAY OF THE BAY AREA

PROGRAMS, AS WELL AS VOLUNTEER MATCHING REFERRALS THAT MATCH AND

MOBILIZE VOLUNTEERS STRATEGICALLY TO MEET IDENTIFIED COMMUNITY NEEDS.

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

100 OUTSTANDING PARTNER ORGANIZATIONS ACROSS THE BAY AREA.

SPARKPOINT HAS EXPANDED WORK INTO COMMUNITY COLLEGES AND COMMUNITY

SCHOOLS. IN FACT, SPARKPOINT IN SAN MATEO COUNTY HAS EXPANDED TO THE

COMMUNITY COLLEGE DISTRICT LEVEL AND NOW ALL 3 COLLEGES HAVE A

SPARKPOINT. WE HAVE ALSO BEGUN THE PLANNING FOR SPARKPOINT AT CHABOT

COLLEGE, SCHEDULED TO LAUNCH IN SPRING 2020. SPARKPOINT IN COMMUNITY

SCHOOLS TAKES A TWO-GENERATION APPROACH TO IMPROVE THE IMMEDIATE AND

LONG-TERM FINANCIAL STABILITY OF PARENTS WHILE ENSURING THAT CHILDREN

ARE HEALTHY AND SUPPORTED AT SCHOOL. THIS DISRUPTS THE CYCLE OF POVERTY

SO THAT ENTIRE FAMILIES CAN SUCCEED NOW AND FAR INTO THE FUTURE.

SPARKPOINT ALSO RECOGNIZES THAT A GOOD EDUCATION, MARKETABLE SKILLS,

AND A GOOD JOB ARE NEEDED TO LIFT SOMEONE OUT OF POVERTY. THROUGH THE

EXPANSION INTO COMMUNITY COLLEGES, CENTERS ALIGN THEIR STRONGEST

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

Schedule O (Form 990 or 990-EZ) (2018)

832211 10-10-18

Name of the organization

UNITED WAY OF THE BAY AREA

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PROGRAMMATIC ASSETS TO IMPROVE THE SCHOOL TO CAREER PATHWAY FOR LOW-INCOME STUDENTS. THEY ENSURE THAT STUDENTS KNOW MORE ABOUT AVAILABLE CAREER AND EDUCATION OPTIONS, INCLUDING POST-SECONDARY JOB TRAINING AND CERTIFICATE AND DEGREE PROGRAMS. SPARKPOINT ENSURES THAT STUDENTS START AND REMAIN ON A PATH TOWARD A GOOD JOB THROUGH WRAP AROUND SUPPORT SERVICES. UWBA'S STRONG RELATIONSHIPS WITH MAJOR EMPLOYERS ACROSS VARIOUS SECTORS, PROVIDE STUDENTS WITH ACCESS TO WORK BASED LEARNING OPPORTUNITIES AND JOBS.

FISCAL YEAR 2019 HIGHLIGHTS INCLUDE: 188 CLIENTS ACHIEVED SELF-SUFFICIENT INCOME 1,709 CLIENTS ARE MAKING PROGRESS TOWARD ONE ELEMENT OF FINANCIAL PROSPERITY: SELF-SUFFICIENT INCOME, 3 MONTHS' SAVINGS, 700 CREDIT SCORE, NO REVOLVING DEBT THERE ARE MORE THAN 20 LOCATIONS THROUGHOUT OUR 8 COUNTIES.

EARN IT! KEEP IT! SAVE IT! ("EKS") IS A UWBA-LED COALITION OF PARTNERS THAT PREPARES TAX RETURNS FOR FREE, ENSURING LOW- TO MODERATE-INCOME FAMILIES GET THE REFUNDS AND CREDITS FOR WHICH THEY ARE ELIGIBLE. DURING THE 2019 TAX SEASON, 2,887 VOLUNTEERS PREPARED MORE THAN 80,595 RETURNS AND BROUGHT BACK OVER \$80.6 MILLION IN REFUNDS. ADDITIONALLY, \$20.1 MILLION OF THOSE REFUNDS WAS IN EARNED INCOME TAX CREDIT ("EITC"). EITC GOES TO THE POOREST, MOST VULNERABLE BAY AREA HOUSEHOLDS AND HAS BEEN IDENTIFIED BY POVERTY-FIGHTING EXPERTS AS ONE OF THE MOST EFFECTIVE PROGRAMS NATIONALLY, LIFTING MILLIONS OF PEOPLE ABOVE THE FEDERAL POVERTY LEVEL EVERY YEAR. FAMILIES USE THEIR REFUNDS PRIMARILY TO PAY BILLS, RENT, AND TO BUY FOOD OR CLOTHES. THROUGH ITS TAX PREPARATION EFFORTS, EKS PROVIDES RESOURCES TO MEET BASIC NEEDS, WHICH IS CRITICAL TO ENDING THE CYCLE OF POVERTY IN THE BAY AREA. EKS HAS 230

Name of the organization	Employer identification number
UNITED WAY OF THE BAY AREA	94-1312348

LOCATIONS IN EIGHT COUNTIES.

IN ADDITION TO PREPARING TAX RETURNS, EKS USES THE PROGRAM VISIT AS A MOMENT TO OFFER LOW-INCOME FAMILIES THE OPPORTUNITY TO INCREASE THEIR SAVINGS.

YOUTH WORKFORCE

UNITED WAY'S YOUTH WORKFORCE PROGRAMMING INCLUDES OUR BUSINESS PATHWAYS INTERNSHIP PROGRAM, WHERE 23 INTERNS WERE PLACED IN LOCAL COMPANIES FOR 10-WEEK INTERNSHIP AND WEEKLY PROFESSIONAL DEVELOPMENT SEMINARS. THE TEAM ALSO CONDUCTED SEVERAL YOUTH EMPLOYMENT EVENTS: 1) CAREERPREP BRINGS VOLUNTEERS IN TO SUPPORT YOUNG PEOPLE IN PREPARING FOR INTERVIEWS AND JOB SEARCHES THROUGH MOCK INTERVIEWS AND RESUME REVIEW AND 2) ONTRACK IS A CAREER EXPOSURE EVENT WHERE EMPLOYERS TALK AND PRESENT ON THEIR INDUSTRY OR COMPANY TO EXPOSE YOUNG PEOPLE TO VARIOUS CAREER PATHS. IN SAN FRANCISCO, THIS EVENT WAS HELD IN PARTNERSHIP WITH THE AFRICAN AMERICAN ACHIEVEMENT INITIATIVE AND SPECIFICALLY FOCUSED ON YOUNG PEOPLE OF COLOR AND PROFESSIONALS WHO ARE PEOPLE OF COLOR TO INCREASE THEIR SAVINGS.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

LIKE UNITED WAYS AROUND THE COUNTRY, UWBA MANAGES THE LOCAL ACTIVITIES OF THE FEDERAL EMERGENCY FOOD AND SHELTER PROGRAM ("EFSP"), WHICH DISTRIBUTES FEDERAL FUNDS TO LOCAL PROGRAMS THAT FEED AND PROVIDE SHELTER TO PEOPLE IN NEED. IN FISCAL YEAR 2019, UWBA DISTRIBUTED MORE THAN \$2.8 MILLION IN EIGHT COUNTIES TO AGENCIES THAT PROVIDED MILLIONS OF MEALS AND THOUSANDS OF SHELTER NIGHTS. IN ADDITION, OUR EMERGENCY ASSISTANCE NETWORK IN SANTA CLARA COUNTY WAS ABLE TO PROVIDE FINANCIAL

Name of the organization

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ASSISTANCE TO 109 HOUSEHOLDS.

LABOR COMMUNITY SERVICES

THE LONG STANDING LABOR-UNITED WAY PARTNERSHIP COMBINES THE POWER OF MORE THAN 12.5 MILLION WORKING FAMILIES AND THEIR COMMUNITIES TOWARD A SHARED VISION WHERE ALL HAVE THE OPPORTUNITY TO REACH THEIR HIGHEST POTENTIAL. LOCALLY, UWBA'S LABOR COMMUNITY SERVICES PROGRAM CONTINUED ITS ESSENTIAL ROLE OF ASSISTING PEOPLE IN POVERTY THROUGH DIRECT PROVISION OF COMMUNITY SERVICES AND POLICY ADVOCACY. IN FISCAL YEAR 2019, OUR LABOR LIAISONS IN TWO COUNTIES (SAN MATEO AND SAN FRANCISCO) HELPED 1,557 BAY AREA FAMILIES RECEIVE DIRECT HARDSHIP ASSISTANCE AND REFERRALS TO HOUSING, HEALTH, UTILITIES, JOB ACCESS ISSUES, AND OTHER EMERGENCIES. THE LIAISONS ALSO WORKED CLOSELY WITH UNITED WAY'S OTHER PROGRAMS, HELPING TO REFER POTENTIAL CLIENTS TO EKS, 211 AND SPARKPOINT. THEY FOCUSED ON KEY ISSUES SUCH AS STRENGTHENING THE SAFETY NET FOR IMMIGRANT FAMILIES AND RAISING THE MINIMUM WAGE.

PUBLIC POLICY

UNITED WAY BAY AREA RECOGNIZES THAT IN ORDER TO ACHIEVE OUR GOAL OF ENDING THE CYCLE OF POVERTY IN OUR COMMUNITY, WE MUST ADVANCE PUBLIC POLICIES THAT SUPPORT OUR MISSION. UWBA'S PUBLIC POLICY TEAM INFLUENCES POLICY AND ENGAGES IN ADVOCACY AT ALL LEVELS OF GOVERNMENT. OUR PRIMARY POLICY FOCUS IS TARGETED AT THE LOCAL LEVEL IN OUR EIGHT-COUNTY SERVICE AREA (ALAMEDA, CONTRA COSTA, MARIN, NAPA, SAN FRANCISCO, SANTA CLARA, SAN MATEO, AND SOLANO). IN ADDITION, WE PROVIDE ADVOCACY SUPPORT TO STATE AND FEDERAL ISSUES IMPORTANT TO THE UNITED WAY SYSTEM. IN FISCAL YEAR 2019, WE WORKED ALONGSIDE OUR CA SYSTEM TO SUCCESSFULLY ADVOCATE FOR THE CA EARNED INCOME TAX CREDIT EXPANSION. THE TEAM JOINED THE

Name of the organization

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UNITED WAY NATIONAL NETWORK IN JUNE TO ADVOCATE FOR PERMANENTLY
 AUTHORIZING THE VITA GRANT PROGRAM. WE ALSO PRODUCED A VOTER GUIDE FOR
 THE NOVEMBER 2018 ELECTION, TAKING POSITIONS ON LOCAL AND STATEWIDE
 BALLOT MEASURES. EACH YEAR, UWBA TAKES VOLUNTEERS AND STAFF TO VISIT
 OUR LEGISLATORS IN SACRAMENTO AND WASHINGTON, D.C. OUR SACRAMENTO
 VISITS INCLUDED OUR SPARKPOINT CLIENT AMBASSADORS.

EXPENSES \$ 3,628,757. INCLUDING GRANTS OF \$ 933,292. REVENUE \$ 0.

FORM 990, PART VI, SECTION A, LINE 1:

EXECUTIVE COMMITTEE IS EMPOWERED WITH LIMITATIONS TO TAKE ACTION ON BEHALF
 OF THE BOARD BETWEEN ITS REGULARLY SCHEDULED MEETINGS.

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

CHIEF OPERATING OFFICER AND CONTROLLER REVIEW FINAL DRAFT OF 990 BEFORE
 PRESENTING TO ALL VOTING MEMBERS OF THE BOARD FOR INFORMATIONAL REVIEW
 PRIOR TO SUBMISSION. BOARD MEMBERS HAVE UP TO A WEEK TO RESPOND WITH
 QUESTIONS AND PRESENT CONCERNS. AFTER THAT, THE 990 IS SUBMITTED TO THE
 IRS.

FORM 990, PART VI, SECTION B, LINE 12C:

THE UWBA IS COMMITTED TO THE HIGHEST STANDARDS OF ETHICAL COMPLIANCE. OUR
 CORPORATE COMPLIANCE POLICY, OUR CODE OF ETHICAL CONDUCT, AND OUR CONFLICT
 OF INTEREST POLICY ARE POSTED ON OUR INTRANET AND ON OUR ORGANIZATION'S
 PUBLIC FACING WEB SITE. TAKEN TOGETHER, THEY OUTLINE THE EXPECTATIONS THE
 UWBA HAS OF ITS EMPLOYEES, VOLUNTEERS, AND REPRESENTATIVES. THE CONFLICT OF
 INTEREST POLICY CONTAINS SPECIFIC INJUNCTIONS AGAINST ANY PRACTICE OR ACT
 WHICH CONFLICTS WITH OR APPEARS TO CONFLICT WITH THE INTERESTS OF THE UWBA,
 BOTH ON AND OFF THE JOB. IT GOES ON TO EXPLICITLY STATE THAT NO EMPLOYEE,

Name of the organization

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VOLUNTEER, OR REPRESENTATIVE SHALL USE HER/HIS POSITION OR INFLUENCE OR INFORMATION TO WHICH THEY HAVE ACCESS TO AS A RESULT OF THEIR ASSOCIATION OR ANY ASSETS OR RESOURCES OF THE UWBA FOR HER/HIS OWN PERSONAL GAIN, FOR TRADING OR FOR THE IMPROPER BENEFIT OF OTHERS.

THE POLICY PROHIBITS PERFORMING COMPENSATED SERVICES FOR OR HAVING A BENEFICIAL INTEREST IN, OR BEING SUBSTANTIALLY OBLIGATED TO (OR A SIMILAR RELATIONSHIP FOR ANY FAMILY MEMBER OR CLOSE RELATIVE), ANY OF UWBA'S SUPPLIERS OF GOODS OR SERVICES OR ANY OTHER ORGANIZATION DOING BUSINESS WITH UWBA UNLESS SUCH FACT HAS BEEN PROPERLY DISCLOSED TO UWBA'S CEO AND TO UWBA'S BOARD, AND SUCH RELATIONSHIP HAS BEEN SPECIFICALLY APPROVED BY THE BOARD ON THE BASIS OF A FULL DISCLOSURE OF THE FACTS.

THE CODE OF ETHICAL CONDUCT SPECIFICALLY REQUIRES THE REPORTING OF VIOLATIONS AND THE PROTECTION OF THOSE WHO REPORT VIOLATIONS. OUR CORPORATE COMPLIANCE POLICY LAYS OUT A CLEARLY DEFINED PROCESS FOR EMPLOYEES AND VOLUNTEERS TO FOLLOW IN ORDER TO DISCLOSE ANY REASONABLE BELIEF THAT ANOTHER EMPLOYEE OR VOLUNTEER HAS VIOLATED LEGAL OR INTERNAL POLICY STANDARDS, WHETHER IN THE WORKPLACE OR OTHERWISE AS PART OF UWBA'S ACTIVITIES. INCLUDED IN THAT PROCEDURE IS A REPORT TO BE MADE TO THE BOARD ANNUALLY REGARDING ITEMS BROUGHT TO THE ATTENTION OF THE CORPORATE COMPLIANCE TASKFORCE, THE RESULTS OF THE INVESTIGATION THE TASKFORCE DID, AND THE STEPS TAKEN TO ADDRESS THE CONCERNS RAISED, IF STEPS WERE MERITED. THE TASKFORCE IS COMPOSED OF THE CHIEF EXECUTIVE OFFICER, THE CHIEF OPERATING OFFICER, THE CHIEF FINANCIAL AND ADMINISTRATIVE OFFICER, AND THE CHIEF ETHICS OFFICER.

THE UNITED WAY OF THE BAY AREA HAS AN ANNUAL PROCESS FOR RE-AFFIRMING ITS

Name of the organization

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CONFLICT OF INTEREST, ITS CODE OF ETHICAL CONDUCT, ITS CORPORATE COMPLIANCE AND DIVERSITY POLICIES. IT ALSO HAS A POLICY OF REVIEWING THE POLICIES ON A PERIODIC BASIS.

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

PROCESS FOR DETERMINING COMPENSATION OF TOP MANAGEMENT AND OFFICERS/KEY EMPLOYEES IS THE SAME - UNITED WAY OF THE BAY AREA HAS A CONTRACTUAL RELATIONSHIP WITH AN INDEPENDENT SALARY CONSULTANT WHO CONSIDERS INDUSTRY, POSITION, EXPERIENCE AND MARKET BEFORE MAKING RECOMMENDATIONS TO UNITED WAY OF THE BAY AREA'S COMPENSATION COMMITTEE. THE COMPENSATION COMMITTEE MEETS AT LEAST TWICE A YEAR TO REVIEW CURRENT DATA, ANALYZE BUDGET ISSUES AND MAKE RECOMMENDATIONS TO THE BOARD OF DIRECTORS. MINIMALLY, THE BOARD APPROVES THE COMPENSATION OF THE CEO, CFAO AND OTHER KEY EMPLOYEES ON AN ANNUAL BASIS.

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

THE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, FORM 990 AND FINANCIAL STATEMENTS ARE AVAILABLE ON THE UNITED WAY OF THE BAY AREA WEBSITE AS WELL AS BY WRITTEN OR IN-PERSON REQUEST.

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

CHANGE IN PENSION LIABILITY IN EXCESS OF INTANGIBLE PENSION

ASSETS -937,174.

UNCOLLECTIBLE PLEDGES -200.

TOTAL TO FORM 990, PART XI, LINE 9 -937,374.

FORM 990, PART VIII AND PART IX

UNITED WAY STANDARD OVERHEAD CALCULATION

Name of the organization

UNITED WAY OF THE BAY AREA

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MANAGEMENT AND GENERAL EXPENSES - \$3,449,191

FUNDRAISING EXPENSES - \$3,257,720

TOTAL SUPPORT SERVICES EXPENSES - \$6,706,911

TOTAL REVENUE - \$30,300,926

OVERHEAD PERCENTAGE - 22.13%

**Application for Automatic Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► **File a separate application for each return.**
► **Go to www.irs.gov/Form8868 for the latest information.**

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.

Automatic 6-Month Extension of Time. Only submit original (no copies needed).

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

		Enter filer's identifying number
Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions. UNITED WAY OF THE BAY AREA	Employer identification number (EIN) or 94-1312348
	Number, street, and room or suite no. If a P.O. box, see instructions. 550 KEARNY ST, NO. 1000	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SAN FRANCISCO, CA 94108	

Enter the Return Code for the return that this application is for (file a separate application for each return)

0	1
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Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JOAN CATHERINE BRAUN

- The books are in the care of ► **550 KEARNY ST, #1000 - SAN FRANCISCO, CA 94108**

Telephone No. ► **415-808-4465**

Fax No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐ ►
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

1 I request an automatic 6-month extension of time until **MAY 15, 2020**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☐ calendar year _____ or► ☒ tax year beginning **JUL 1, 2018**, and ending **JUN 30, 2019**.

2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	0.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	0.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2019)**COPY**