**Part I: Summary**

1. Briefly describe the organization's mission or most significant activities: **TO PROVIDE LEADERSHIP AND DEVELOP THE RESOURCES AND SOLUTIONS THAT IMPROVE OUR COMMUNITY**

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

3. Number of voting members of the governing body (Part VI, line 1a)

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

5. Total number of individuals employed in calendar year 2017 (Part V, line 2a)

6. Total number of volunteers (estimate if necessary)

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

7b. Net unrelated business taxable income from Form 990-T, line 34

8. Contributions and grants (Part VIII, line 1h)

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

10. Investment income (Part VIII, column (A), lines 3, 4, and 7d)

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

12. Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)

13. Grants and similar amounts paid (Part IX, column (A), lines 1-3)

14. Benefits paid to or for members (Part IX, column (A), line 4)

15. Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)

16a. Professional fundraising fees (Part IX, column (A), line 11e)

16b. Total fundraising expenses (Part IX, column (D), line 25)

17. Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)

18. Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)

19. Revenue less expenses. Subtract line 18 from line 12

**Part II: Signature Block**

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

**Signature of officer**

**Date**

**Preparer’s signature**

**Date**

**PTIN**

**Firm’s EIN**

**Phone no.**

May the IRS discuss this return with the preparer shown above? (see instructions)
Part III Statement of Program Service Accomplishments

1 Briefly describe the organization’s mission:

THE MISSION OF THE UNITED WAY OF THE GREATER LEHIGH VALLEY IS TO PROVIDE THE LEADERSHIP, CONVENE THE PARTNERSHIPS, AND DEVELOP THE RESOURCES AND SOLUTIONS THAT IMPROVE OUR COMMUNITY.

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 $ 14,134,113. including grants of $ 12,258,517. ) (Revenue $ )

COMMUNITY IMPACT INVESTMENTS

IN SUPPORT OF OUR 2022 COMMUNITY GOAL OF INCREASING BY 50% THE NUMBER OF 3RD GRADERS IN THE LEHIGH VALLEY READING ON GRADE LEVEL, OUR EDUCATION INVESTMENTS TOALED $4,036,341; THIS INCLUDES 53 PROGRAMS PROVIDING 4,056 AT-RISK CHILDREN AND FAMILIES WITH EARLY LITERACY SKILLS SUPPORT, HIGH QUALITY EARLY LEARNING, PARENT AND CHILD DEVELOPMENT EDUCATION, SUMMER KINDERGARTEN READINESS, SKILL BUILDING COURSES FOR EARLY CHILDHOOD TEACHERS AS WELL AS PROVIDING ELEMENTARY AND MIDDLE SCHOOL STUDENTS WITH TARGETED ACADEMIC INTERVENTIONS, SUMMER LEARNING, MENTORING, POSITIVE YOUTH DEVELOPMENT, BEHAVIORAL HEALTH SERVICES, AND FAMILY CASE MANAGEMENT. SEE ADDITIONAL INFO ON SCH. O.

4b (Code: ) (Expenses $ including grants of $ ) (Revenue $ )

4c (Code: ) (Expenses $ including grants of $ ) (Revenue $ )

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

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

4e Total program service expenses ▶ 14,134,113.
Part IV Checklist of Required Schedules

1. Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?
   - Yes, complete Schedule A
   - No

2. Is the organization required to complete Schedule B, Schedule of Contributors?
   - Yes, complete Schedule B
   - No

3. Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If Yes, complete Schedule C, Part I
   - Yes, complete Schedule C, Part I
   - No

4. Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If Yes, complete Schedule C, Part II
   - Yes, complete Schedule C, Part II
   - No

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? If Yes, complete Schedule C, Part III
   - Yes, complete Schedule C, Part III
   - No

6. Did the organization receive or hold a possible election under FIN 48 (ASC 740)?
   - Yes, complete Schedule D, Part X
   - No

7. Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If Yes, complete Schedule D, Part II
   - Yes, complete Schedule D, Part II
   - No

8. Did the organization maintain collections of works of art, historical treasures, or other similar assets? If Yes, complete Schedule D, Part III
   - Yes, complete Schedule D, Part III
   - No

9. Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If Yes, complete Schedule D, Part IV
   - Yes, complete Schedule D, Part IV
   - No

10. Did the organization report an amount in Part X, line 25? If Yes, complete Schedule D, Part V
    - Yes, complete Schedule D, Part V
    - No

11. If the organization’s answer to any of the following questions is Yes, then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.
    a. Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If Yes, complete Schedule D, Part VI
    - Yes, complete Schedule D, Part VI
    - No

    b. Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If Yes, complete Schedule D, Part VII
    - Yes, complete Schedule D, Part VII
    - No

    c. Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If Yes, complete Schedule D, Part VIII
    - Yes, complete Schedule D, Part VIII
    - No

    d. Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If Yes, complete Schedule D, Part IX
    - Yes, complete Schedule D, Part IX
    - No

    e. Did the organization report an amount for other liabilities in Part X, line 25? If Yes, complete Schedule D, Part X
    - Yes, complete Schedule D, Part X
    - No

    f. Did the organization’s separate or consolidated financial statements for the tax year include a footnote that addresses the organization’s liability for uncertain tax positions under FIN 48 (ASC 740)? If Yes, complete Schedule D, Part XI
    - Yes, complete Schedule D, Part XI
    - No

12a. Did the organization obtain separate, independent audited financial statements for the tax year? If Yes, complete Schedule D, Parts XI and XII
    - Yes, complete Schedule D, Parts XI and XII
    - No

b. Was the organization included in consolidated, independent audited financial statements for the tax year?
   - Yes, and if the organization answered No to line 12a, then completing Schedule D, Parts XI and XII is optional
   - No

13. Is the organization a school described in section 170(b)(1)(A)(iii)? If Yes, complete Schedule E
    - Yes, complete Schedule E
    - No

14a. Did the organization maintain an office, employees, or agents outside of the United States?
    - Yes, complete Schedule F, Parts I and IV
    - No

b. Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? If Yes, complete Schedule F, Parts I and IV
   - Yes, complete Schedule F, Parts I and IV
   - No

15. Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? If Yes, complete Schedule F, Parts II and IV
    - Yes, complete Schedule F, Parts II and IV
    - No

16. Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? If Yes, complete Schedule F, Parts III and IV
    - Yes, complete Schedule F, Parts III and IV
    - No

17. Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If Yes, complete Schedule G, Part I
    - Yes, complete Schedule G, Part I
    - No

18. Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If Yes, complete Schedule G, Part II
    - Yes, complete Schedule G, Part II
    - No

19. Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? If Yes, complete Schedule G, Part III
    - Yes, complete Schedule G, Part III
    - No
20a Did the organization operate one or more hospital facilities?  If "Yes," complete Schedule H
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?

21 Did the organization report more than $5,000 of grants or other assistance to any domestic organization or
domestic government on Part IX, column (A), line 1?  If "Yes," complete Schedule I, Parts I and II

22 Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on
Part IX, column (A), line 2?  If "Yes," complete Schedule I, Parts I and II

23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization’s current
and former officers, directors, trustees, key employees, and highest compensated employees?  If "Yes," complete
Schedule J

24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the
last day of the year, that was issued after December 31, 2002?  If "Yes," answer lines 24b through 24d and complete
Schedule K.  If "No", go to line 25a
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?
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?
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?

25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.  Did the organization engage in an excess benefit
transaction with a disqualified person during the year?  If "Yes," complete Schedule L, Part I
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and
that the transaction has not been reported on any of the organization’s prior Forms 990 or 990-EZ?  If "Yes," complete
Schedule L, Part I

26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or
former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons?  If "Yes," complete
Schedule L, Part II

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?  If "Yes," complete Schedule L, Part III

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?  If "Yes," complete Schedule L, Part IV
b A family member of a current or former officer, director, trustee, or key employee?  If "Yes," complete Schedule L, Part IV
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?  If "Yes," complete Schedule L, Part IV

29 Did the organization receive more than $25,000 in non-cash contributions?

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

31 Did the organization liquidate, terminate, or dissolve and cease operations?

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

33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations
sections 301.7701-2 and 301.7701-3?  If "Yes," complete Schedule R, Part I

34 Was the organization related to any tax-exempt or taxable entity?  If "Yes," complete Schedule R, Part II, III, or IV, and
Part V, line 1

35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?
b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity
within the meaning of section 512(b)(13)?  If "Yes," complete Schedule R, Part V, line 2

36 Section 501(c)(3) organizations.  Did the organization make any transfers to an exempt non-charitable related organization?
If "Yes," complete Schedule R, Part V, line 2

37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization
and that is treated as a partnership for federal income tax purposes?  If "Yes," complete Schedule R, Part VI

38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?

Note.  All Form 990 filers are required to complete Schedule O
### Part V

#### Statements Regarding Other IRS Filings and Tax Compliance

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

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Enter the number reported in Box 3 of Form 1096. Enter 0 if not applicable</td>
<td>8</td>
</tr>
<tr>
<td>1b</td>
<td>Enter the number of Forms W-2G included in line 1a. Enter 0 if not applicable</td>
<td>0</td>
</tr>
<tr>
<td>1c</td>
<td>Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?</td>
<td>X</td>
</tr>
<tr>
<td>2a</td>
<td>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</td>
<td>44</td>
</tr>
<tr>
<td>2b</td>
<td>If at least one is reported on line 2a, did the organization file all required federal employment tax returns?</td>
<td>X</td>
</tr>
<tr>
<td>3a</td>
<td>Did the organization have unrelated business gross income of $1,000 or more during the year?</td>
<td>X</td>
</tr>
<tr>
<td>3b</td>
<td>If &quot;Yes,&quot; has it filed a Form 990-T for this year?</td>
<td>X</td>
</tr>
<tr>
<td>4a</td>
<td>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)?</td>
<td>X</td>
</tr>
<tr>
<td>5a</td>
<td>Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?</td>
<td>X</td>
</tr>
<tr>
<td>5b</td>
<td>Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</td>
<td>X</td>
</tr>
<tr>
<td>5c</td>
<td>If &quot;Yes,&quot; to line 5a or 5b, did the organization file Form 8886-T?</td>
<td></td>
</tr>
<tr>
<td>6a</td>
<td>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?</td>
<td>X</td>
</tr>
<tr>
<td>6b</td>
<td>If &quot;Yes,&quot; did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?</td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Organizations that may receive deductible contributions under section 170(c).</td>
<td></td>
</tr>
<tr>
<td>7b</td>
<td>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?</td>
<td>X</td>
</tr>
<tr>
<td>7c</td>
<td>If &quot;Yes,&quot; did the organization notify the donor of the value of the goods or services provided?</td>
<td>X</td>
</tr>
<tr>
<td>7d</td>
<td>Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?</td>
<td></td>
</tr>
<tr>
<td>7e</td>
<td>Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</td>
<td>X</td>
</tr>
<tr>
<td>7f</td>
<td>Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</td>
<td>X</td>
</tr>
<tr>
<td>7g</td>
<td>If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?</td>
<td></td>
</tr>
<tr>
<td>7h</td>
<td>If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?</td>
<td></td>
</tr>
<tr>
<td>8a</td>
<td>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?</td>
<td></td>
</tr>
<tr>
<td>9a</td>
<td>Sponsoring organizations maintaining donor advised funds.</td>
<td></td>
</tr>
<tr>
<td>10a</td>
<td>Section 501(c)(7) organizations. Enter:</td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>Initiation fees and capital contributions included on Part VIII, line 12</td>
<td></td>
</tr>
<tr>
<td>11a</td>
<td>Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</td>
<td></td>
</tr>
<tr>
<td>11b</td>
<td>Gross income from members or shareholders</td>
<td></td>
</tr>
<tr>
<td>12a</td>
<td>Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)</td>
<td></td>
</tr>
<tr>
<td>12b</td>
<td>Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?</td>
<td></td>
</tr>
<tr>
<td>12c</td>
<td>If &quot;Yes,&quot; enter the amount of tax-exempt interest received or accrued during the year</td>
<td></td>
</tr>
<tr>
<td>13a</td>
<td>Section 501(c)(29) qualified nonprofit health insurance issuers.</td>
<td></td>
</tr>
<tr>
<td>13b</td>
<td>Is the organization licensed to issue qualified health plans in more than one state?</td>
<td></td>
</tr>
<tr>
<td>13c</td>
<td>Note. See the instructions for additional information the organization must report on Schedule O.</td>
<td></td>
</tr>
<tr>
<td>14a</td>
<td>Did the organization receive any payments for indoor tanning services during the tax year?</td>
<td>X</td>
</tr>
<tr>
<td>14b</td>
<td>If &quot;Yes,&quot; has it filed a Form 720 to report these payments?</td>
<td></td>
</tr>
</tbody>
</table>

---

**Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).

---

**If at least one is reported on line 2a,** did the organization file all required federal employment tax returns? **X**

**If "Yes,"** has it filed a Form 990-T for this year? **X**

**At any time during the calendar year,** did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? **X**


**Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?** **X**

**Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?** **X**

**If "Yes,"** to line 5a or 5b, did the organization file Form 8886-T? **|

**Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?** **X**

**If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?** **|**

**Organizations that may receive deductible contributions under section 170(c).**

**Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?** **X**

**If "Yes,"** did the organization notify the donor of the value of the goods or services provided? **X**

**Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?** **|**

**Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?** **X**

**Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?** **X**

**If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?** **|

**If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?** **|

**Sponsoring organizations maintaining donor advised funds.**

**If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).**
Section A. Governing Body and Management

1a. Enter the number of voting members of the governing body at the end of the tax year. If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. 

b. Enter the number of voting members included in line 1a, above, who are independent 

2. Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? 

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? 

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

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

6. Did the organization have members or stockholders? 

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? 

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

8. Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: 

a. The governing body? 

b. Each committee with authority to act on behalf of the governing body? 

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. 

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

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

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? 

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 

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

c. Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done 

13. Did the organization have a written whistleblower policy? 

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

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 

b. Other officers or key employees of the organization 

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? 

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 in which a copy of this Form 990 is required to be filed. 

PA 

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

X Own website 
X Another's website 
X 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: 

THE ORGANIZATION - 610-807-5755 

1110 AMERICAN PARKWAY NE, NO. F-120, ALLENTOWN, PA 18109 

732006 11-28-17 Form 990 (2017) UNITED WAY OF THE GREATER LEHIGH VALLEY 23-2657933 Page 6
### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

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.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Average hours per week</th>
<th>(C) Position</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) DAVID LEWIS</td>
<td>40.00</td>
<td>X</td>
<td>172,221.</td>
<td>0.</td>
<td>11,831.</td>
</tr>
<tr>
<td>PRESIDENT</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(2) PETER RUGGIERO</td>
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<td>X</td>
<td>0.</td>
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</tr>
<tr>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) ANNE BAUM</td>
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<td>X</td>
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<td>0.</td>
<td>0.</td>
</tr>
<tr>
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</tr>
<tr>
<td>(4) MEGAN BESTE</td>
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<td>0.</td>
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<tr>
<td>BOARD MEMBER</td>
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<tr>
<td>(5) WENDY BORN</td>
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<td>0.</td>
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<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
<td></td>
<td></td>
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<tr>
<td>(6) THOMAS DAUB</td>
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</tr>
<tr>
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<td></td>
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<tr>
<td>(7) RAFAEL DE LA HOZ</td>
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<tr>
<td>BOARD MEMBER</td>
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<td></td>
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<tr>
<td>(8) DOROTA GASIENICA-KOZAK</td>
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</tr>
<tr>
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<td></td>
<td>X</td>
<td></td>
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</tr>
<tr>
<td>(9) DR. MARC GRANSON</td>
<td>0.50</td>
<td>X</td>
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<td>0.</td>
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</tr>
<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>(10) TRISHA R. HIGGINS, CPA</td>
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<td>0.</td>
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<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(11) DR. CARLOS HODGES</td>
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<td>X</td>
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<tr>
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<td>X</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>(12) JOHN MARZANO</td>
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<td>0.</td>
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</tr>
<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
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</tr>
<tr>
<td>(13) DAVID NOEL</td>
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</tr>
<tr>
<td>BOARD MEMBER</td>
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</tr>
<tr>
<td>(14) THOMAS PARKER</td>
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<td>0.</td>
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<tr>
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<tr>
<td>(16) MATTHEW PYE</td>
<td>0.50</td>
<td>X</td>
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<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
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<tr>
<td>(17) JOANNE RAFAEL</td>
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<tr>
<td>BOARD MEMBER</td>
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<td>X</td>
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</tr>
</tbody>
</table>
### Part VII

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

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(18) CELESTE RAU</td>
<td>0.50</td>
<td>X</td>
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<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(19) TIMOTHY S. Rausch</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(20) JOHN F. REINHART</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(21) DR. TINA Q. RICHARDSON</td>
<td>0.50</td>
<td>X</td>
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<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>(22) DR. JOSEPH ROY</td>
<td>0.50</td>
<td>X X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD VICE CHAIR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(23) ASHLEY RUSSO</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>(24) SALEEM SAAB</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(25) DR. BILL SCHANINGER</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>(26) JOHN WERKHEISER</td>
<td>0.50</td>
<td>X</td>
<td>0.</td>
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<td>0.</td>
</tr>
<tr>
<td>BOARD MEMBER</td>
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<td></td>
</tr>
<tr>
<td><strong>1b Sub-total</strong></td>
<td></td>
<td></td>
<td>172,221.</td>
<td>0.</td>
<td>11,831.</td>
</tr>
<tr>
<td><strong>c Total from continuation sheets to Part VII, Section A</strong></td>
<td></td>
<td></td>
<td>340,329.</td>
<td>0.</td>
<td>52,412.</td>
</tr>
<tr>
<td><strong>d Total (add lines 1b and 1c)</strong></td>
<td></td>
<td></td>
<td>512,550.</td>
<td>0.</td>
<td>64,243.</td>
</tr>
</tbody>
</table>

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: 4

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.

---

#### Section B. Independent Contractors

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

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization: 0
<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week (list any hours for related organizations below line)</th>
<th>(C) Position (check all that apply)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(27) MARCI LESKO</td>
<td>40.00</td>
<td>X X</td>
<td>117,654.</td>
<td>0.</td>
<td>16,632.</td>
</tr>
<tr>
<td>EXECUTIVE VICE PRESIDENT/SECRETARY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(28) DEBRA KLOCEK</td>
<td>40.00</td>
<td>X</td>
<td>102,030.</td>
<td>0.</td>
<td>7,377.</td>
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<tr>
<td>VICE PRESIDENT, FINANCE &amp; ADMIN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(29) PAUL HURD</td>
<td>40.00</td>
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<td>120,645.</td>
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<td>28,403.</td>
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<tr>
<td>VICE PRESIDENT, RESOURCE DEVELOPMENT</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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<tr>
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</tr>
</tbody>
</table>

Total to Part VII, Section A, line 1c .......................................................... 340,329. 52,412.
## Part VIII Statement of Revenue

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

<table>
<thead>
<tr>
<th>Contributions, Gifts, Grants and Other Similar Amounts</th>
<th>(A) Total revenue</th>
<th>(B) Related or exempt function revenue</th>
<th>(C) Unrelated business revenue</th>
<th>(D) Revenue excluded from tax under sections 512-514</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Federated campaigns</td>
<td>132,491.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b Membership dues</td>
<td>16,320,245.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1c Fundraising events</td>
<td>18,794,084.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1d Related organizations</td>
<td>0.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1e Government grants (contributions)</td>
<td>0.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1f All other contributions, gifts, grants, and similar amounts not included above</td>
<td>0.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1g Noncash contributions included in lines 1a-1f: $1,201,832.</td>
<td>18,452,736.</td>
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</tr>
<tr>
<td><strong>h Total. Add lines 1a-1f</strong></td>
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<td></td>
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</tbody>
</table>

### Program Service Revenue

<table>
<thead>
<tr>
<th>Business Code</th>
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</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Other Revenue

<table>
<thead>
<tr>
<th>Business Code</th>
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</thead>
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<tr>
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</tbody>
</table>

### Investment Income (including dividends, interest, and other similar amounts)

<table>
<thead>
<tr>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Royalties

<table>
<thead>
<tr>
<th>(i) Real</th>
<th>(ii) Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross rents

<table>
<thead>
<tr>
<th>(i) Securities</th>
<th>(ii) Other</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
</tbody>
</table>

### Gross income from fundraising events (not including $ contributed on line 1c).

<table>
<thead>
<tr>
<th>Part IV, line 18</th>
<th>a</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

### Gross income from gaming activities.

<table>
<thead>
<tr>
<th>Part IV, line 19</th>
<th>a</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

### Gross sales of inventory, less returns and allowances

<table>
<thead>
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<th>Part IV, line 19</th>
<th>a</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Miscellaneous Revenue

<table>
<thead>
<tr>
<th>Business Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

| Total, Add lines 11a-11d | 18,794,084. | 0. | 0. | 341,348. |

### Total revenue. See instructions.

| Total revenue. See instructions. | 18,794,084. | 0. | 0. | 341,348. |

---

**UNITED WAY OF THE GREATER LEHIGH VALLEY**

**23-2657933**
### 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:

<table>
<thead>
<tr>
<th></th>
<th>(A) Total expenses</th>
<th>(B) Program service expenses</th>
<th>(C) Management and general expenses</th>
<th>(D) Fundraising expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>12,258,517</td>
<td>12,258,517</td>
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<tr>
<td>2</td>
<td>318,338</td>
<td>120,121</td>
<td>56,242</td>
<td>141,975</td>
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<tr>
<td>3</td>
<td>1,876,982</td>
<td>804,106</td>
<td>408,407</td>
<td>664,469</td>
</tr>
<tr>
<td>4</td>
<td>84,485</td>
<td>29,548</td>
<td>20,578</td>
<td>34,359</td>
</tr>
<tr>
<td>5</td>
<td>286,139</td>
<td>101,915</td>
<td>65,958</td>
<td>118,266</td>
</tr>
<tr>
<td>6</td>
<td>164,560</td>
<td>57,554</td>
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<td>66,925</td>
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<tr>
<td>7</td>
<td>251,134</td>
<td>110,575</td>
<td>51,482</td>
<td>89,077</td>
</tr>
<tr>
<td>8</td>
<td>33,952</td>
<td>21,082</td>
<td>3,257</td>
<td>9,613</td>
</tr>
<tr>
<td>9</td>
<td>232,153</td>
<td>155,834</td>
<td>29,693</td>
<td>46,626</td>
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<tr>
<td>10</td>
<td>53,485</td>
<td>23,936</td>
<td>10,823</td>
<td>18,726</td>
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<td>11</td>
<td>25,750</td>
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<tr>
<td>12</td>
<td>251,134</td>
<td>110,575</td>
<td>51,482</td>
<td>89,077</td>
</tr>
<tr>
<td>13</td>
<td>33,952</td>
<td>21,082</td>
<td>3,257</td>
<td>9,613</td>
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<tr>
<td>14</td>
<td>232,153</td>
<td>155,834</td>
<td>29,693</td>
<td>46,626</td>
</tr>
<tr>
<td>15</td>
<td>53,485</td>
<td>23,936</td>
<td>10,823</td>
<td>18,726</td>
</tr>
<tr>
<td>16</td>
<td>251,134</td>
<td>110,575</td>
<td>51,482</td>
<td>89,077</td>
</tr>
<tr>
<td>17</td>
<td>33,952</td>
<td>21,082</td>
<td>3,257</td>
<td>9,613</td>
</tr>
<tr>
<td>18</td>
<td>71,282</td>
<td>44,261</td>
<td>6,839</td>
<td>20,182</td>
</tr>
<tr>
<td>19</td>
<td>77,089</td>
<td>33,943</td>
<td>15,803</td>
<td>27,343</td>
</tr>
<tr>
<td>20</td>
<td>15,774</td>
<td>2,853</td>
<td>11,130</td>
<td>1,791</td>
</tr>
<tr>
<td>21</td>
<td>594,957</td>
<td>270,870</td>
<td>92,809</td>
<td>231,278</td>
</tr>
<tr>
<td>22</td>
<td>154,892</td>
<td>21,905</td>
<td>132,419</td>
<td>568</td>
</tr>
<tr>
<td>23</td>
<td>125,831</td>
<td>55,403</td>
<td>25,795</td>
<td>44,633</td>
</tr>
<tr>
<td>24</td>
<td>37,407</td>
<td>6,766</td>
<td>26,394</td>
<td>4,247</td>
</tr>
<tr>
<td>25</td>
<td>16,677,651</td>
<td>14,134,113</td>
<td>1,023,460</td>
<td>1,520,078</td>
</tr>
<tr>
<td>26</td>
<td>Check here ▶</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Balance Sheet

**Form 990 (2017)**

#### Part X

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

<table>
<thead>
<tr>
<th></th>
<th>Beginning of year</th>
<th></th>
<th>End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cash - non-interest-bearing</td>
<td>200,267</td>
<td>2,238,860</td>
</tr>
<tr>
<td>2</td>
<td>Savings and temporary cash investments</td>
<td>4,281,761</td>
<td>4,614,193</td>
</tr>
<tr>
<td>3</td>
<td>Pledges and grants receivable, net</td>
<td>53,336</td>
<td>69,878</td>
</tr>
<tr>
<td>4</td>
<td>Accounts receivable, net</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>5</td>
<td>Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>6</td>
<td>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</td>
<td>28</td>
<td>27</td>
</tr>
<tr>
<td>7</td>
<td>Notes and loans receivable, net</td>
<td>25</td>
<td>24</td>
</tr>
<tr>
<td>8</td>
<td>Inventories for sale or use</td>
<td>23</td>
<td>22</td>
</tr>
<tr>
<td>9</td>
<td>Prepaid expenses and deferred charges</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>10a</td>
<td>Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D</td>
<td>10a</td>
<td>10c</td>
</tr>
<tr>
<td>b</td>
<td>Less: accumulated depreciation</td>
<td>171,130</td>
<td>339,114</td>
</tr>
<tr>
<td>11</td>
<td>Investments - publicly traded securities</td>
<td>3,579,141</td>
<td>3,146,681</td>
</tr>
<tr>
<td>12</td>
<td>Investments - other securities. See Part IV, line 11</td>
<td>2,095,980</td>
<td>2,386,532</td>
</tr>
<tr>
<td>13</td>
<td>Investments - program-related. See Part IV, line 11</td>
<td>2,322,522</td>
<td>2,147,166</td>
</tr>
<tr>
<td>14</td>
<td>Intangible assets</td>
<td>276,947</td>
<td>174,410</td>
</tr>
<tr>
<td>15</td>
<td>Other assets. See Part IV, line 11</td>
<td>10,955,573</td>
<td>13,035,657</td>
</tr>
<tr>
<td>16</td>
<td><strong>Total assets.</strong> Add lines 1 through 15 (must equal line 34)</td>
<td>479,522</td>
<td>413,481</td>
</tr>
<tr>
<td>17</td>
<td>Accounts payable and accrued expenses</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Deferred revenue</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Tax-exempt bond liabilities</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Escrow or custodial account liability. Complete Part IV of Schedule D</td>
<td>19,976</td>
<td>18,666</td>
</tr>
<tr>
<td>22</td>
<td>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</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Secured mortgages and notes payable to unrelated third parties</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Unsecured notes and loans payable to unrelated third parties</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>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</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>26</td>
<td><strong>Total liabilities.</strong> Add lines 17 through 25</td>
<td>2,099,954</td>
<td>2,147,166</td>
</tr>
<tr>
<td>27</td>
<td>Organizations that follow SFAS 117 (ASC 958), check here □ and complete lines 27 through 29, and lines 33 and 34.</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Unrestricted net assets</td>
<td>27</td>
<td>2,599,452</td>
</tr>
<tr>
<td>29</td>
<td>Temporarily restricted net assets</td>
<td>28</td>
<td>2,579,313</td>
</tr>
<tr>
<td>30</td>
<td>Permanently restricted net assets</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Organizations that do not follow SFAS 117 (ASC 958), check here □ and complete lines 30 through 34.</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Capital stock or trust principal, or current funds</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Paid-in or capital surplus, or land, building, or equipment fund</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Retained earnings, endowment, accumulated income, or other funds</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Total net assets or fund balances</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Total liabilities and net assets/fund balances</td>
<td>10,955,573</td>
<td>13,035,657</td>
</tr>
</tbody>
</table>
### Part XI  Reconciliation of Net Assets

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (must equal Part VIII, column (A), line 12)</td>
<td>18,794,084</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (must equal Part IX, column (A), line 25)</td>
<td>16,677,651</td>
</tr>
<tr>
<td>3</td>
<td>Revenue less expenses. Subtract line 2 from line 1</td>
<td>2,116,433</td>
</tr>
<tr>
<td>4</td>
<td>Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))</td>
<td>8,356,121</td>
</tr>
<tr>
<td>5</td>
<td>Net unrealized gains (losses) on investments</td>
<td>-64,742</td>
</tr>
<tr>
<td>6</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Investment expenses</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Prior period adjustments</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Other changes in net assets or fund balances (explain in Schedule O)</td>
<td>48,532</td>
</tr>
<tr>
<td>10</td>
<td>Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))</td>
<td>10,456,344</td>
</tr>
</tbody>
</table>

### Part XII  Financial Statements and Reporting

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[ ] Cash [x] Accrual [ ] Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the organization changed its method of accounting from a prior year or checked &quot;Other,&quot; explain in Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization’s financial statements compiled or reviewed by an independent accountant?</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If &quot;Yes,&quot; 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:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[ ] Separate basis [x] Consolidated basis [ ] Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Were the organization’s financial statements audited by an independent accountant?</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If &quot;Yes,&quot; check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>[x] Separate basis [ ] Consolidated basis [ ] Both consolidated and separate basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>If &quot;Yes&quot; 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?</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>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?</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; 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</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

1. A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
2. A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).)
3. A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).
4. A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital’s name, city, and state:
5. An organization operated for the benefit of a college or university owned or operated by a governmental unit described in section 170(b)(1)(A)(iv). (Complete Part II.)
6. A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).
7. An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)
8. A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)
9. An agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:
10. An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.)
12. An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

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

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

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

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

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

f. Enter the number of supported organizations

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

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

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1   Gifts, grants, contributions, and membership fees received. (Do not include any “unusual grants.”)</td>
<td>11,215,376</td>
<td>11,442,263</td>
<td>11,625,546</td>
<td>12,325,592</td>
<td>18,452,736</td>
<td>65,061,513</td>
</tr>
<tr>
<td>2   Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3   The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td>11,215,376</td>
<td>11,442,263</td>
<td>11,625,546</td>
<td>12,325,592</td>
<td>18,452,736</td>
<td>65,061,513</td>
</tr>
<tr>
<td>4   Total. Add lines 1 through 3</td>
<td>11,215,376</td>
<td>11,442,263</td>
<td>11,625,546</td>
<td>12,325,592</td>
<td>18,452,736</td>
<td>65,061,513</td>
</tr>
<tr>
<td>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)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>6,348,424</td>
</tr>
<tr>
<td>6   Public support. Subtract line 5 from line 4.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>58,713,089</td>
</tr>
</tbody>
</table>

#### Section B. Total Support

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7   Amounts from line 4</td>
<td>11,215,376</td>
<td>11,442,263</td>
<td>11,625,546</td>
<td>12,325,592</td>
<td>18,452,736</td>
<td>65,061,513</td>
</tr>
<tr>
<td>8   Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources</td>
<td>221,264</td>
<td>195,977</td>
<td>181,332</td>
<td>226,483</td>
<td>341,348</td>
<td>1,166,404</td>
</tr>
<tr>
<td>9   Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10  Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)</td>
<td>63,222</td>
<td>95,425</td>
<td>117,162</td>
<td>209,618</td>
<td></td>
<td>485,427</td>
</tr>
<tr>
<td>11  Total support. Add lines 7 through 10</td>
<td>66,713,344</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12  Gross receipts from related activities, etc. (see instructions)</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14  Public support percentage for 2017 (line 6, column (f) divided by line 11, column (f))</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>88.01%</td>
</tr>
<tr>
<td>15  Public support percentage from 2016 Schedule A, Part II, line 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>87.49%</td>
</tr>
<tr>
<td>16a 33 1/3% support test - 2017. 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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>17a 10% -facts-and-circumstances test - 2017. 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 &quot;facts-and-circumstances&quot; test, check this box and stop here. Explain in Part VI how the organization meets the &quot;facts-and-circumstances&quot; test. The organization qualifies as a publicly supported organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
### Section A. Public Support

**Calendar year (or fiscal year beginning in)**

<table>
<thead>
<tr>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
</table>

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

7b. Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year

8. **Public support. (Subtract line 7c from line 6)**

### Section B. Total Support

**Calendar year (or fiscal year beginning in)**

<table>
<thead>
<tr>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
</table>

9. Amounts from line 6

10a. Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources

10b. Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975

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, 10a, 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

<table>
<thead>
<tr>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
</table>

15. Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f))

16. Public support percentage from 2016 Schedule A, Part III, line 15

### Section D. Computation of Investment Income Percentage

<table>
<thead>
<tr>
<th>(a) 2013</th>
<th>(b) 2014</th>
<th>(c) 2015</th>
<th>(d) 2016</th>
<th>(e) 2017</th>
<th>(f) Total</th>
</tr>
</thead>
</table>

17. Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f))

18. Investment income percentage from 2016 Schedule A, Part III, line 17

19a. **33 1/3% support tests - 2017.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

19b. **33 1/3% support tests - 2016.** 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

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

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

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

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

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

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

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

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

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

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

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

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

7  Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If “Yes,” complete Part I of Schedule L (Form 990 or 990-EZ).

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

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

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

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

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

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

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?
      Yes
      No
      11a
   b A family member of a person described in (a) above?
      Yes
      No
      11b
   c A 35% controlled entity of a person described in (a) or (b) above? If “Yes”, provide detail in Part VI.
      Yes
      No
      11c

Section B. Type I Supporting Organizations

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.
   Yes
   No
   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.
   Yes
   No
   2

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

1. Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization’s tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization’s governing documents in effect on the date of notification, to the extent not previously provided?
   Yes
   No
   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).
   Yes
   No
   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.
   Yes
   No
   3

Section E. Type III Functionally Integrated Supporting Organizations

1. Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).
   a The organization satisfied the Activities Test. Complete line 2 below.
   b The organization is the parent of each of its supported organizations. Complete line 3 below.
   c The organization supported a governmental 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.
      Yes
      No
      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.
      Yes
      No
      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.
      Yes
      No
      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.
      Yes
      No
      3b
### Schedule A (Form 990 or 990-EZ) 2017

#### Part V

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

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

### Section A - Adjusted Net Income

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

### Section B - Minimum Asset Amount

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

### Section C - Distributable Amount

<table>
<thead>
<tr>
<th></th>
<th>Current Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Adjusted net income for prior year (from Section A, line 8, Column A)</td>
</tr>
<tr>
<td>2</td>
<td>Enter 85% of line 1</td>
</tr>
<tr>
<td>3</td>
<td>Minimum asset amount for prior year (from Section B, line 8, Column A)</td>
</tr>
<tr>
<td>4</td>
<td>Enter greater of line 2 or line 3</td>
</tr>
<tr>
<td>5</td>
<td>Income tax imposed in prior year</td>
</tr>
<tr>
<td>6</td>
<td><strong>Distributable Amount.</strong> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)</td>
</tr>
<tr>
<td>7</td>
<td>Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).</td>
</tr>
</tbody>
</table>

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Schedule A (Form 990 or 990-EZ) 2017

UNITED WAY OF THE GREATER LEHIGH VALLEY 23-2657933

Page 6

12040211 757874 63054.001 2017.05030 UNITED WAY OF THE GREATER 63054.01
### Part V
**Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

#### Section D - Distributions

<table>
<thead>
<tr>
<th>Current Year</th>
<th>Section D - Distributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amounts paid to supported organizations to accomplish exempt purposes</td>
</tr>
<tr>
<td>2</td>
<td>Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity</td>
</tr>
<tr>
<td>3</td>
<td>Administrative expenses paid to accomplish exempt purposes of supported organizations</td>
</tr>
<tr>
<td>4</td>
<td>Amounts paid to acquire exempt-use assets</td>
</tr>
<tr>
<td>5</td>
<td>Qualified set-aside amounts (prior IRS approval required)</td>
</tr>
<tr>
<td>6</td>
<td>Other distributions (describe in Part VI). See instructions.</td>
</tr>
<tr>
<td>7</td>
<td><strong>Total annual distributions. Add lines 1 through 6.</strong></td>
</tr>
<tr>
<td>8</td>
<td>Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.</td>
</tr>
<tr>
<td>9</td>
<td>Distributable amount for 2017 from Section C, line 6</td>
</tr>
<tr>
<td>10</td>
<td>Line 8 amount divided by line 9 amount</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>(i)</th>
<th>(ii)</th>
<th>(iii)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excess Distributions</td>
<td>Underdistributions Pre-2017</td>
<td>Distributable Amount for 2017</td>
</tr>
<tr>
<td>1</td>
<td>Distributable amount for 2017 from Section C, line 6</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Underdistributions, if any, for years prior to 2017 (reasonable cause required- explain in Part VI). See instructions.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any, to 2017</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>From 2013</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>From 2014</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>From 2015</td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>From 2016</td>
<td></td>
</tr>
<tr>
<td>f</td>
<td><strong>Total</strong> of lines 3a through e</td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Applied to 2017 distributable amount</td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Carryover from 2012 not applied (see instructions)</td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Remainder. Subtract lines 3g, 3h, and 3i from 3f.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Distributions for 2017 from Section D, line 7:</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Applied to underdistributions of prior years</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Applied to 2017 distributable amount</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Remainder. Subtract lines 4a and 4b from 4.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Remaining underdistributions for years prior to 2017, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Remaining underdistributions for 2017. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td><strong>Excess distributions carryover to 2018. Add lines 3j and 4c.</strong></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Breakdown of line 7:</td>
<td></td>
</tr>
<tr>
<td>a</td>
<td>Excess from 2013</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Excess from 2014</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Excess from 2015</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Excess from 2016</td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Excess from 2017</td>
<td></td>
</tr>
</tbody>
</table>

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Schedule A (Form 990 or 990-EZ) 2017
**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, 3, 5, and 6. Also complete this part for any additional information. (See instructions.)

**SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME:**

**OTHER INCOME**

2013 AMOUNT: $ 63,222.

2014 AMOUNT: $ 95,425.

2015 AMOUNT: $ 117,162.

2016 AMOUNT: $ 209,618.

**SCHEDULE A PART II SECTION A LINE 1**

HISTORICALLY, THE UNITED WAY OF THE GREATER LEHIGH VALLEY FILED SCHEDULE A NETTING DONOR DESIGNATED GIFTS RECOGNIZED AS CONTRIBUTION REVENUE. BEGINNING IN 2013, THE ORGANIZATION IS NOW INCLUDING THE GROSS VALUE OF DONOR DESIGNATIONS WITH ALL OTHER CONTRIBUTION REVENUE.
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 GREATER LEHIGH VALLEY

Employer identification number

23-2657933

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 .......................... $ 0.

3 Volunteer hours for political campaign activities .................................. 0.

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 .......... $ 0.

2 Enter the amount of any excise tax incurred by organization managers under section 4955 .......... $ 0.

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.

<table>
<thead>
<tr>
<th>(a) Name</th>
<th>(b) Address</th>
<th>(c) EIN</th>
<th>(d) Amount paid from filing organization’s funds. If none, enter -0-.</th>
<th>(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Schedule C (Form 990 or 990-EZ) 2017
Limits on Lobbying Expenditures
(The term "expenditures" means amounts paid or incurred.)

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
<th>(a) Filing organization’s totals</th>
<th>(b) Affiliated group totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a</td>
<td>Total lobbying expenditures to influence public opinion (grass roots lobbying)</td>
<td>0.</td>
<td></td>
</tr>
<tr>
<td>1b</td>
<td>Total lobbying expenditures to influence a legislative body (direct lobbying)</td>
<td>0.</td>
<td></td>
</tr>
<tr>
<td>1c</td>
<td>Total lobbying expenditures (add lines 1a and 1b)</td>
<td>0.</td>
<td></td>
</tr>
<tr>
<td>1d</td>
<td>Other exempt purpose expenditures</td>
<td>36,380.</td>
<td></td>
</tr>
<tr>
<td>1e</td>
<td>Total exempt purpose expenditures (add lines 1c and 1d)</td>
<td>36,380.</td>
<td></td>
</tr>
<tr>
<td>1f</td>
<td>Lobbying nontaxable amount. Enter the amount from the following table in both columns.</td>
<td>7,276.</td>
<td></td>
</tr>
</tbody>
</table>

If the amount on line 1e, column (a) or (b) is:

<table>
<thead>
<tr>
<th>Expenditure Amount</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>

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.)

<table>
<thead>
<tr>
<th>Calendar year (or fiscal year beginning in)</th>
<th>(a) 2014</th>
<th>(b) 2015</th>
<th>(c) 2016</th>
<th>(d) 2017</th>
<th>(e) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a</td>
<td>Lobbying nontaxable amount</td>
<td>2,777.</td>
<td>6,144.</td>
<td>7,526.</td>
<td>7,276.</td>
</tr>
<tr>
<td>2b</td>
<td>Lobbying ceiling amount (150% of line 2a, column (e))</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>Total lobbying expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2d</td>
<td>Grassroots nontaxable amount</td>
<td>694.</td>
<td>1,536.</td>
<td>1,882.</td>
<td>2,272.</td>
</tr>
<tr>
<td>2e</td>
<td>Grassroots ceiling amount (150% of line 2d, column (e))</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2f</td>
<td>Grassroots lobbying expenditures</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Schedule C (Form 990 or 990-EZ) 2017
**Part II-B**  Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

For each "Yes," response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.

<table>
<thead>
<tr>
<th></th>
<th>(a)</th>
<th>(b)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:</td>
<td>Yes</td>
</tr>
<tr>
<td>a</td>
<td>Volunteers?</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Media advertisements?</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Mailings to members, legislators, or the public?</td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Publications, or published or broadcast statements?</td>
<td></td>
</tr>
<tr>
<td>f</td>
<td>Grants to other organizations for lobbying purposes?</td>
<td></td>
</tr>
<tr>
<td>g</td>
<td>Direct contact with legislators, their staffs, government officials, or a legislative body?</td>
<td></td>
</tr>
<tr>
<td>h</td>
<td>Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?</td>
<td></td>
</tr>
<tr>
<td>i</td>
<td>Other activities?</td>
<td></td>
</tr>
<tr>
<td>j</td>
<td>Total. Add lines 1c through 1i</td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?</td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>If &quot;Yes,&quot; enter the amount of any tax incurred under section 4912</td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>If &quot;Yes,&quot; enter the amount of any tax incurred by organization managers under section 4912</td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?</td>
<td></td>
</tr>
</tbody>
</table>

**Part III-A**  Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Were substantially all (90% or more) dues received nondeductible by members?</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Did the organization make only in-house lobbying expenditures of $2,000 or less?</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?</td>
<td>3</td>
</tr>
</tbody>
</table>

**Part III-B**  Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) and if either (a) BOTH Part III-A, lines 1 and 2, are answered "No," OR (b) Part III-A, line 3, is answered "Yes."

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2a</th>
<th>2b</th>
<th>2c</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dues, assessments and similar amounts from members</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).</td>
<td></td>
<td>2a</td>
<td>2b</td>
<td>2c</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>a</td>
<td>Current year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Carryover from last year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues</td>
<td></td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?</td>
<td></td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Taxable amount of lobbying and political expenditures (see instructions)</td>
<td></td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Part IV**  Supplemental Information

Provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; Part II-A (affiliated group list); Part II-A, lines 1 and 2 (see instructions); and Part II-B, line 1. Also, complete this part for any additional information.

**PART I-A, LINE 1:**

THE ORGANIZATION HAS NOT SUPPORTED ANY POLITICAL CANDIDATE.
Supplemental Financial Statements

### Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts

<table>
<thead>
<tr>
<th></th>
<th>(a) Donor advised funds</th>
<th>(b) Funds and other accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total number at end of year</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Aggregate value of contributions to (during year)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Aggregate value of grants from (during year)</td>
<td>1,310.</td>
</tr>
<tr>
<td>4</td>
<td>Aggregate value at end of year</td>
<td>18,666.</td>
</tr>
</tbody>
</table>

5. Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization’s property, subject to the organization’s exclusive legal control? [ ] Yes [ ] No

6. Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? [ ] Yes [ ] No

### Part II Conservation Easements

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)
   - Protection of natural habitat
   - Preservation of open space
   - Preservation of a historically important land area
   - Preservation of a certified historic structure

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.

<table>
<thead>
<tr>
<th></th>
<th>Held at the End of the Tax Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Total number of conservation easements</td>
</tr>
<tr>
<td>b</td>
<td>Total acreage restricted by conservation easements</td>
</tr>
<tr>
<td>c</td>
<td>Number of conservation easements on a certified historic structure included in (a)</td>
</tr>
<tr>
<td>d</td>
<td>Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register</td>
</tr>
</tbody>
</table>

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

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

5. Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? [ ] Yes [ ] No

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

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

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

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

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

1. 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.

   a. Revenue included on Form 990, Part VIII, line 1
   b. 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
### 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):

- [ ] Public exhibition
- [ ] Scholarly research
- [ ] Preservation for future generations
- [ ] Loan or exchange programs
- [ ] Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  
   - [ ] Yes  
   - [ ] No

### Part IV Escrow and Custodial Arrangements

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

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?  
   - [ ] Yes  
   - [X] No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

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

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

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

### Part V Endowment Funds

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

1a Beginning of year balance  
   - [ ] Current year 1,712,262.  
   - [ ] Prior year 1,383,711.  
   - [ ] Two years back 1,379,964.  
   - [ ] Three years back 1,582,194.  
   - [ ] Four years back 1,478,733.

b Contributions  
   - [ ] Current year 127,018.  
   - [ ] Prior year 258,000.  
   - [ ] Two years back 5,242.  
   - [ ] Three years back 90,095.

<table>
<thead>
<tr>
<th>Amount</th>
<th>2a</th>
<th>2b</th>
<th>2c</th>
<th>2d</th>
<th>2e</th>
<th>2f</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- [ ] Board designated or quasi-endowment  
  - [ ] Permanent endowment ➤ 30.64 %

- [ ] Temporarily restricted endowment ➤ %

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

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

- [ ] unrelated organizations  
  - [ ] related organizations

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

### Part VI Land, Buildings, and Equipment

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

<table>
<thead>
<tr>
<th>Description of property</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(c) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Land</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b Buildings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c Leasehold improvements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d Equipment</td>
<td></td>
<td>510,244.</td>
<td>171,130.</td>
<td>339,114.</td>
</tr>
<tr>
<td>e Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Total, Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.) | ➤ 339,114. |
**Part VII Investments - Other Securities.**

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

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2) Closely-held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3) Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(A) SPLIT INTEREST AGREEMENTS</td>
<td>149,693. COST</td>
<td></td>
</tr>
<tr>
<td>(B) PERPETUAL TRUSTS</td>
<td>2,236,839. COST</td>
<td></td>
</tr>
<tr>
<td>(C)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(D)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(E)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(F)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(G)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(H)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)</strong></td>
<td>2,386,532.</td>
<td></td>
</tr>
</tbody>
</table>

**Part VIII Investments - Program Related.**

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

<table>
<thead>
<tr>
<th>(a) Description of investment</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Part IX Other Assets.**

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

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>(1)</td>
<td></td>
</tr>
<tr>
<td>(2)</td>
<td></td>
</tr>
<tr>
<td>(3)</td>
<td></td>
</tr>
<tr>
<td>(4)</td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
</tr>
<tr>
<td>(6)</td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
</tr>
<tr>
<td>(9)</td>
<td></td>
</tr>
<tr>
<td><strong>Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)</strong></td>
<td></td>
</tr>
</tbody>
</table>

**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) DESIGNATIONS PAYABLE | 2,056,452. |
   (3) LIABILITY TO DONORS UNDER |                |
   (4) SPLIT-INTEREST TRUSTS | 90,714. |
   (5) |                |
   (6) |                |
   (7) |                |
   (8) |                |
   (9) |                |
| **Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)** | 2,147,166. |

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 [x]
**Schedule D (Form 990) 2017**

**UNITED WAY OF THE GREATER LEHIGH VALLEY**  23-2657933  Page 4

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

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

1. **Total revenue, gains, and other support per audited financial statements**
   - 1. 12,850,969.

2. **Amounts included on line 1 but not on Form 990, Part VIII, line 12:**
   - 2a. **Net unrealized gains (losses) on investments**
   - 2b. **Donated services and use of facilities**
   - 2c. **Recoveries of prior year grants**
   - 2d. **Other (Describe in Part XIII.)**
   - 2e. **Add lines 2a through 2d**
   - 2e. 620,965.

3. **Subtract line 2e from line 1**
   - 3. 12,230,004.

4. **Amounts included on Form 990, Part VIII, line 12, but not on line 1:**
   - 4a. **Investment expenses not included on Form 990, Part VIII, line 7b**
   - 4b. **Other (Describe in Part XIII.)**
   - 4c. **Add lines 4a and 4b**
   - 4c. 6,564,080.

5. **Total revenue. Add lines 3 and 4c.**
   - 5. 18,794,084.

### 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. 10,750,746.

2. **Amounts included on line 1 but not on Form 990, Part IX, line 25:**
   - 2a. **Donated services and use of facilities**
   - 2b. **Prior year adjustments**
   - 2c. **Other losses**
   - 2d. **Other (Describe in Part XIII.)**
   - 2e. **Add lines 2a through 2d**
   - 2e. 637,175.

3. **Subtract line 2e from line 1**
   - 3. 10,113,571.

4. **Amounts included on Form 990, Part IX, line 25, but not on line 1:**
   - 4a. **Investment expenses not included on Form 990, Part VIII, line 7b**
   - 4b. **Other (Describe in Part XIII.)**
   - 4c. **Add lines 4a and 4b**
   - 4c. 6,564,080.

5. **Total expenses. Add lines 3 and 4c.**
   - 5. 16,677,651.

### Part XIII  Supplemental Information.

Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

---

**PART IV, LINE 2B:**

EDUCATION 2020 DISBURSEMENT OF FUNDS ARE AUTHORIZED BY THE CO-CHAIRS OF THE PROFESSIONAL STAFF COMMITTEE. UNITED WAY OF THE GREATER LEHIGH VALLEY IS A LIMITED FISCAL SPONSOR AND HAS NO LEGAL CONTROL OF FUNDS, HAS NO VARIANCE POWER OVER FUNDS AND PROVIDES NO ADMINISTRATIVE SUPPORT. UNITED WAY OF THE GREATER LEHIGH VALLEY PROVIDES A MONTHLY REPORT OF RECEIPTS AND DISBURSEMENTS.

---

**PART V, LINE 4:**

THE ORGANIZATION’S ENDOWMENT CONSISTS OF FUNDS DESIGNATED BY THE BOARD OF DIRECTORS TO FUNCTION AS ENDOWMENTS. AS REQUIRED BY GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, NET ASSETS ASSOCIATED WITH ENDOWMENT FUNDS,
INCLUDING FUNDS DESIGNATED BY THE BOARD OF DIRECTORS TO FUNCTION AS ENDOWMENTS, ARE CLASSIFIED AND REPORTED BASED ON THE EXISTENCE OR ABSENCE OF DONOR-IMPOSED RESTRICTIONS.


SPENDING POLICY: THE SPENDING POLICY OF THE OPPORTUNITY INVESTMENT FUND SHALL BE 5% ANNUALLY OR AT THE DISCRETION OF THE BOARD OF DIRECTORS GIVEN A GRANT MATCH OPPORTUNITY. IF THE FUND BALANCE FALLS BELOW MINIMUM LEVEL, MEASURES MUST BE TAKEN TO RESTORE THE FUND BALANCE WITHIN A THREE YEAR PERIOD. THE SPENDING POLICY OF THE DONOR-RESTRICTED ENDOWMENT FUND SHALL BE 4% ANNUALLY AS PART OF THE ANNUAL BUDGET.

THE PURPOSE OF ESTABLISHING AN INVESTMENT POLICY ASSET MIX IS TO CONSTRUCT A TARGET OR "NORMAL" SET OF INVESTMENTS, WELL DIVERSIFIED AMONG SUITABLE ASSET CLASSES THAT WILL GENERATE, ON AVERAGE, THE LEVEL OF EXPECTED RETURN NECESSARY TO MEET ENDOWMENT OBJECTIVES AT THE LOWEST VOLATILITY CONSISTENT
WITH ACHIEVING THAT RETURN.

PART X, LINE 2:
IN ACCORDANCE WITH GENERALLY ACCEPTED ACCOUNTING PRINCIPLES, THE ORGANIZATION ACCOUNTS FOR UNCERTAIN TAX POSITIONS RELATIVE TO UNRELATED BUSINESS INCOME, IF ANY, AS REQUIRED.

PART XI, LINE 2D - OTHER ADJUSTMENTS:
UNREALIZED GAINS ON BENEFICIAL INTEREST IN PERPETUAL TRUSTS 45,683.
CHANGE IN VALUE OF SPLIT INTEREST AGREEMENTS 2,849.
TOTAL TO SCHEDULE D, PART XI, LINE 2D 48,532.

PART XI, LINE 4B - OTHER ADJUSTMENTS:
INVESTMENT MANAGEMENT FEES 14,924.
DONOR DESIGNATED CONTRIBUTIONS 6,549,156.
TOTAL TO SCHEDULE D, PART XI, LINE 4B 6,564,080.

PART XII, LINE 4B - OTHER ADJUSTMENTS:
INVESTMENT MANAGEMENT FEES 14,924.
DONOR DESIGNATED CONTRIBUTIONS 6,549,156.
TOTAL TO SCHEDULE D, PART XII, LINE 4B 6,564,080.
### 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 [X]  
   - 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.**

<table>
<thead>
<tr>
<th>1(a) Name and address of organization or government</th>
<th>2(b) EIN</th>
<th>3(c) IRC section (if applicable)</th>
<th>4(d) Amount of cash grant</th>
<th>5(e) Amount of non-cash assistance</th>
<th>6(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>7(g) Description of noncash assistance</th>
<th>8(h) Purpose of grant or assistance</th>
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2. Enter total number of section 501(c)(3) and government organizations listed in the line 1 table
3. Enter total number of other organizations listed in the line 1 table

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

Schedule I (Form 990) (2017)
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<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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<td>(a) Name and address of organization or government</td>
<td>(b) EIN</td>
<td>(c) IRC section if applicable</td>
<td>(d) Amount of cash grant</td>
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### 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.)

<table>
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<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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Schedule I (Form 990)
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Schedule I (Form 990)
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<td>(c) IRC section if applicable</td>
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<td>(e) Amount of non-cash assistance</td>
<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td>(d) Amount of cash grant</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td><strong>(d)</strong> Amount of cash grant</td>
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<td><strong>(f)</strong> Method of valuation (book, FMV, appraisal, other)</td>
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<td>(a) Name and address of organization or government</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
<td>(g) Description of non-cash assistance</td>
<td>(h) Purpose of grant or assistance</td>
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<td>(f) Method of valuation (book, FMV, appraisal, other)</td>
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<td>(h) Purpose of grant or assistance</td>
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</table>
## UNITED WAY OF THE GREATER LEHIGH VALLEY

### Schedule I (Form 990) Part II

**Continuation of Grants and Other Assistance to Governments and Organizations in the United States**

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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### Part II
Continuation of Grants and Other Assistance to Governments and Organizations in the United States

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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### Part II
Continuation of Grants and Other Assistance to Governments and Organizations in the United States

<table>
<thead>
<tr>
<th>(a) Name and address of organization or government</th>
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<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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### 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.

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<th>(b) Number of recipients</th>
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<th>(d) Amount of non-cash assistance</th>
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<th>(f) Description of noncash assistance</th>
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### Part IV  Supplemental Information

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

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### 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.

- [ ] First-class or charter travel
- [ ] Travel for companions
- [ ] Tax indemnification and gross-up payments
- [ ] Discretionary spending account
- [ ] Housing allowance or residence for personal use
- [ ] Payments for business use of personal residence
- [ ] Health or social club dues or initiation fees
- [ ] Personal services (such as, maid, chauffeur, chef)

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

#### 2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, 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.

- [ ] Compensation committee
- [X] Independent compensation consultant
- [X] Form 990 of other organizations
- [X] Written employment contract
- [X] Compensation survey or study
- [X] Approval by the board or compensation committee

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

- [X] Receive a severance payment or change-of-control payment?
- [X] Participate in, or receive payment from, a supplemental nonqualified retirement plan?
- [X] Participate in, or receive payment from, an equity-based compensation arrangement?

If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

#### 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:

- [X] The organization?
- [X] Any related organization?

If "Yes" on line 5a or 5b, describe in Part III.

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

- [X] The organization?
- [X] Any related organization?

If "Yes" on line 6a or 6b, describe in Part III.

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

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

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

---

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

Schedule J (Form 990) 2017
For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren’t listed on Form 990, Part VII.

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

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Breakdown of W-2 and/or 1099-MISC compensation</th>
<th>(C) Retirement and other deferred compensation</th>
<th>(D) Nontaxable benefits</th>
<th>(E) Total of columns (B)(i)-(D)</th>
<th>(F) Compensation in column (B) reported as deferred on prior Form 990</th>
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UNITED WAY OF THE GREATER LEHIGH VALLEY 23-2657933

Schedule J (Form 990) 2017
PART I, LINE 3:

PRESIDENT'S ANNUAL PERFORMANCE EVALUATION

- CONDUCTED BY THE BOARD CHAIR, VICE-CHAIR

- PERFORMANCE METRICS DEVELOPED WITH PRESIDENT IN JUNE/JULY FOR THE NEXT FISCAL YEAR

- PERFORMANCE METRICS DOCUMENTED AND APPROVED BY EXECUTIVE COMMITTEE, COPY TO HR

- PERFORMANCE METRICS SHARED WITH FULL BOARD

- ANNUAL PERFORMANCE EVALUATION CONDUCTED BY BOARD CHAIR AND VICE-CHAIR AT END OF FISCAL YEAR.

- EVALUATION DOCUMENTED AND HIGHLIGHTS SHARED WITH EXECUTIVE COMMITTEE, COPY TO HR

- EXECUTIVE COMMITTEE VOTES ON ANNUAL SALARY ADJUSTMENT

- HIGHLIGHTS OF EVALUATION SHARED WITH FULL BOARD

EXECUTIVE COMPENSATION & BENEFIT PACKAGE AND CONTRACT

- BOARD CHAIR, VICE-CHAIR FORM A COMMITTEE TO REVIEW EXECUTIVE COMPENSATION AND BENEFITS.

- COMPENSATION COMMITTEE WILL BE STAFFED BY DIRECTOR, HUMAN RESOURCES AND
VP FINANCE & ADMINISTRATION.

- COMMITTEE WILL REVIEW CURRENT COMPENSATION & BENEFITS PACKAGE AND COMPARE WITH LIKE-SIZED UW’S AND/OR AREA NON-PROFITS.

- AN EMPLOYMENT CONTRACT WILL BE DRAFTED WITH INPUT AND REVIEW OF COUNSEL.

- EMPLOYMENT CONTRACT IS PRESENTED TO THE EXECUTIVE COMMITTEE FOR APPROVAL.

  EXECUTIVE COMMITTEE VOTES TO RECOMMEND CONTRACT FOR APPROVAL BY BOARD.

- BOARD REVIEWS AND VOTES TO APPROVE CONTRACT, INCLUDING AUTHORIZING UP TO A 10% VARIANCE IN TOTAL CONTRACT VALUE FOR NEGOTIATION WITH EMPLOYEE.

- BOARD CHAIR AND/OR VICE-CHAIR PRESENT CONTRACT TO PRESIDENT. PRESIDENT SHALL PRESENT CONTRACT FOR ALL OTHER EMPLOYEES.

- EMPLOYEE MUST SEEK OUTSIDE LEGAL COUNSEL FOR REVIEW OF CONTRACT.

- IF CONTRACT REVISIONS ARE NEEDED THEY ARE REVIEWED AND APPROVED BY UWGLV COUNSEL.

- CONTRACT IS SIGNED BY EMPLOYEE, BOARD CHAIR, VICE-CHAIR AND VP FINANCE & ADMINISTRATION.

- COPY OF FULLY EXECUTED CONTRACT TO HR. DETAILS OF CONTRACT ARE CONFIDENTIAL AND WILL NOT BE SHARED OUTSIDE OF THE BOARD OF DIRECTORS.

- ALL EMPLOYMENT CONTRACTS SHALL FOLLOW THIS PROCESS WITH INPUT FROM THE PRESIDENT FOR ANY OF HIS/HER DIRECT REPORTS.
PART I, LINE 5:
ALL EMPLOYEES PARTICIPATE IN A VARIABLE PAY INCENTIVE PROGRAM WHICH ONE OF
THE PROGRAM REQUIREMENTS IS TOTAL CAMPAIGN REVENUE RAISED.

PART I, LINE 6:
ALL EMPLOYEES PARTICIPATE IN A VARIABLE PAY INCENTIVE PROGRAM WHICH ONE OF
THE PROGRAM REQUIREMENTS IS TOTAL CAMPAIGN REVENUE RAISED.
## Part I Excess Benefit Transactions

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40a.

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</table>

1. Enter the amount of tax incurred by the organization managers or disqualified persons during the year under section 4958

2. Enter the amount of tax, if any, on line 2, above, reimbursed by the organization

## Part II Loans to and/or From Interested Persons

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a or Form 990, Part IV, line 26; or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22.

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## Part III Grants or Assistance Benefiting Interested Persons

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

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</table>
### Part IV  Business Transactions Involving Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

<table>
<thead>
<tr>
<th>(a) Name of interested person</th>
<th>(b) Relationship between interested person and the organization</th>
<th>(c) Amount of transaction</th>
<th>(d) Description of transaction</th>
<th>(e) Sharing of organization’s revenues?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASHLEY RUSSO</td>
<td>BOARD MEMBER IS OWN</td>
<td>0. MEDIA PRODU</td>
<td>X</td>
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</tbody>
</table>

### Part V  Supplemental Information

Provide additional information for responses to questions on Schedule L (see instructions).

SCH L, PART IV, BUSINESS TRANSACTIONS INVOLVING INTERESTED PERSONS:

(A) NAME OF PERSON: ASHLEY RUSSO

(B) RELATIONSHIP BETWEEN INTERESTED PERSON AND ORGANIZATION:

BOARD MEMBER IS OWNER OF ASR MEDIA

(D) DESCRIPTION OF TRANSACTION: MEDIA PRODUCTIONS
Noncash Contributions

<table>
<thead>
<tr>
<th>Part I</th>
<th>Types of Property</th>
<th>(a) Check if applicable</th>
<th>(b) Number of contributions or items contributed</th>
<th>(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g</th>
<th>(d) Method of determining noncash contribution amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Art - Works of art</td>
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<td>2</td>
<td>Art - Historical treasures</td>
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<td>3</td>
<td>Art - Fractional interests</td>
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<td>4</td>
<td>Books and publications</td>
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<td>5</td>
<td>Clothing and household goods</td>
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<td>6</td>
<td>Cars and other vehicles</td>
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<td>7</td>
<td>Boats and planes</td>
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<td>8</td>
<td>Intellectual property</td>
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<td>9</td>
<td>Securities - Publicly traded</td>
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<td>X 37 1,201,832</td>
<td>FMV AT DATE OF GIFT</td>
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<tr>
<td>10</td>
<td>Securities - Closely held stock</td>
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<tr>
<td>11</td>
<td>Securities - Partnership, LLC, or trust interests</td>
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<tr>
<td>12</td>
<td>Securities - Miscellaneous</td>
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<tr>
<td>13</td>
<td>Qualified conservation contribution - Historic structures</td>
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<td>14</td>
<td>Qualified conservation contribution - Other</td>
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<td>15</td>
<td>Real estate - Residential</td>
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<td>16</td>
<td>Real estate - Commercial</td>
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<td>17</td>
<td>Real estate - Other</td>
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<td>18</td>
<td>Collectibles</td>
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<td>Food inventory</td>
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<td>20</td>
<td>Drugs and medical supplies</td>
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<td>21</td>
<td>Taxidermy</td>
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<td>22</td>
<td>Historical artifacts</td>
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<td>23</td>
<td>Scientific specimens</td>
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<td>24</td>
<td>Archeological artifacts</td>
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<td>25</td>
<td>Other</td>
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<td>Other</td>
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<td>27</td>
<td>Other</td>
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<td>28</td>
<td>Other</td>
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<tr>
<td>29</td>
<td>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</td>
<td>29</td>
<td></td>
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<tr>
<td>30a</td>
<td>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?</td>
<td>Yes No</td>
<td>30a X</td>
<td>31 X</td>
<td>32a X</td>
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<tr>
<td>31</td>
<td>Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?</td>
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<tr>
<td>32a</td>
<td>Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?</td>
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<td>33</td>
<td>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.</td>
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</table>

For Paperwork Reduction Act Notice, see the Instructions for Form 990.
Part II  Supplemental Information. Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.
IN SUPPORT OF OUR 2022 COMMUNITY GOAL OF INCREASING BY 50% THE NUMBER OF DEPENDENT SENIORS IN THE LEHIGH VALLEY WHO ARE SUPPORTED, OUR HEALTHY AGING INVESTMENTS TOTALED $424,407 THIS INCLUDES 14 PROGRAMS PROVIDING 796 OLDER ADULTS WITH GROCERY SHOPPING SERVICES, FALL PREVENTION PROGRAMS, TRANSPORTATION SERVICES, CHRONIC DISEASE PROGRAMS, AND IN-HOME SUPPORT SERVICES.

IN SUPPORT OF OUR 2022 COMMUNITY GOAL OF DECREASING BY 50% FOOD INSECURITY IN THE LEHIGH VALLEY, OUR FOOD ACCESS INVESTMENTS TOTALED $342,875; THIS INCLUDES 9 PROGRAMS PROVIDING 38,593 PEOPLE WITH FOOD FROM PANTRIES, HOME DELIVERED MEALS, AND NUTRITION EDUCATION COURSES.

FOR CONTINUED SUPPORT OUR COMMUNITY IMPACT INVESTMENTS INCLUDE $595,000 IN 13 EMERGENCY SERVICES PROGRAMS THAT PROVIDE 15,572 LEHIGH VALLEY RESIDENTS WITH EMERGENCY SHELTER, VIOLENCE AND CRISIS SHELTER, DISASTER RELIEF, EMERGENCY FOOD, VIOLENCE AND CRISIS SUPPORTS, HOUSING-BASED LEGAL SERVICES, RESOURCE AND ASSISTANCE INFORMATION REFERRALS, AND DAY OF CARING VOLUNTEER SERVICES.

UNITED WAY SERVING CARBON COUNTY INVESTED $20,000 INTO 11 PROGRAMS IN THE REGION. THESE PROGRAMS RANGED IN SERVICES FROM INTERVENING IN HOUSING/UTILITY CRISIS TO AVOID EVICTION, HOUSING FOR THE HOMELESS, AFTERSCHOOL PROGRAMS, AND DENTAL VAN SERVICES FOR STUDENTS.
UNITED WAY COMMUNITY SCHOOLS

UNITED WAY COMMUNITY SCHOOLS LINKS 15 AREA SCHOOLS WITH THEIR COMMUNITIES IN WAYS THAT ARE GIVING PUBLIC EDUCATION IN THE LEHIGH VALLEY RESOURCES AND SUPPORT THAT IS CRUCIAL DURING THESE TOUGH ECONOMIC TIMES. UNITED WAY PROVIDES FUNDING, CONVENES PARTNERS TO IDENTIFY SYSTEMS-LEVEL STRATEGIES TO SUPPORT YOUTH SUCCEEDING IN SCHOOL, CONNECTS RESOURCES AND PROGRAMS TO SCHOOL SITES TO SUPPORT ENHANCED SCHOOL DAY LEARNING, ASSISTS WITH ON-SITE COACHING AND TRAINING TO SUPPORT IMPLEMENTATION OF THE COMMUNITY SCHOOL MODEL AND COLLECTS AND ANALYZES DATA TO MONITOR PROGRESS OF THIS SYSTEMS LEVEL WORK. UNITED WAY COMMUNITY SCHOOLS HAVE EXPERIENCED TREMENDOUS GROWTH IN FAMILY AND COMMUNITY INVOLVEMENT, IMPROVEMENTS IN ACADEMIC PERFORMANCE FOR INDIVIDUAL STUDENTS, AND IMPROVED SCHOOL CLIMATE.

UNITED WAY ALLIANCE ON AGING

THE UNITED WAY ALLIANCE ON AGING IS A MULTI-PARTNER INITIATIVE RUN BY UNITED WAY OF THE GREATER LEHIGH VALLEY THAT ADVANCES MODEL SOLUTIONS TO COMMUNITY PROBLEMS AFFECTING OLDER ADULTS. RATHER THAN FUNDING PROGRAMS IN THE CURRENT SYSTEM, THE UNITED WAY ALLIANCE ON AGING BRINGS TOGETHER NON-PROFIT, FOR PROFIT, GOVERNMENT AND COMMUNITY ADVOCATES TO WORK TOGETHER TO CREATE SYSTEMS-LEVEL CHANGE. BY FOSTERING COLLABORATION AND SUPPORTING INNOVATIVE BEST PRACTICE STRATEGIES, WE IMPROVE LIVES BY CHANGING THE VERY WAY SUPPORTS ARE DELIVERED.

AGENCY DESIGNATIONS ACHIEVEMENTS

UNITED WAY OF THE GREATER LEHIGH VALLEY HONORS DONOR REQUESTS TO DESIGNATE THEIR CONTRIBUTIONS TO ANY 501(C)(3) AGENCY WITH HEALTH AND...
HUMAN SERVICE PROGRAMS. UNITED WAYS AROUND THE COUNTRY PERFORM THIS SERVICE FOR AGENCIES AS A COURTESY TO DONORS.

OTHER PROGRAM SERVICES

COMMUNITY EDUCATION WORK WITH MEDIA ON BEHALF OF AGENCIES, DAY OF CARING ACTIVITIES, FUNDS DISTRIBUTION, COORDINATION OF HEALTH/HUMAN SERVICE PROGRAMS IN THE LEHIGH VALLEY, AND LABOR COMMUNITY SERVICES.

FORM 990, PART VI, SECTION A, LINE 2:
- BOARD MEMBER ASHLEY RUSSO IS OWNER OF ASR MEDIA WITH WHOM THE ORGANIZATION CONDUCTS BUSINESS WITH;

FORM 990, PART VI, SECTION B, LINE 11B:
THE FORM 990 IS DISTRIBUTED TO ALL BOARD MEMBERS AND FEEDBACK SOLICITED PRIOR TO SUBMITTING.

FORM 990, PART VI, SECTION B, LINE 12C:
ALL VOLUNTEERS AND EMPLOYEES ARE ASKED TO SIGN A CONFLICT OF INTEREST DISCLOSURE FORM. QUESTIONS ABOUT POTENTIAL CONFLICTS OF INTEREST ARE DIRECTED TO THE CHIEF VOLUNTEER OFFICER OR DESIGNEE BY VOLUNTEERS AND TO THE PRESIDENT BY STAFF. THE CHIEF VOLUNTEER OFFICER IS RESPONSIBLE FOR MONITORING POLICY COMPLIANCE AMONG VOLUNTEERS AND FOR TAKING CORRECTIVE ACTION CONCERNING VIOLATION. THE PRESIDENT IS RESPONSIBLE IN A SIMILAR MANNER FOR STAFF.

FORM 990, PART VI, SECTION B, LINE 15:
EXECUTIVE COMPENSATION & BENEFIT PACKAGE AND CONTRACT
- BOARD CHAIR, VICE-CHAIR FORM A COMMITTEE TO REVIEW EXECUTIVE COMPENSATION
AND BENEFITS.

- COMPENSATION COMMITTEE WILL BE STAFFED BY DIRECTOR, HUMAN RESOURCES AND VP FINANCE & ADMINISTRATION.
- COMMITTEE WILL REVIEW CURRENT COMPENSATION & BENEFITS PACKAGE AND COMPARE WITH LIKE-SIZED UW'S AND/OR AREA NON-PROFITS.
- AN EMPLOYMENT CONTRACT WILL BE DRAFTED WITH INPUT AND REVIEW OF COUNSEL.
- EMPLOYMENT CONTRACT IS PRESENTED TO THE EXECUTIVE COMMITTEE FOR APPROVAL.
- EXECUTIVE COMMITTEE VOTES TO RECOMMEND CONTRACT FOR APPROVAL BY BOARD.
- BOARD REVIEWS AND VOTES TO APPROVE CONTRACT, INCLUDING AUTHORIZING UP TO A 10% VARIANCE IN TOTAL CONTRACT VALUE FOR NEGOTIATION WITH EMPLOYEE.
- BOARD CHAIR AND/OR VICE-CHAIR PRESENT CONTRACT TO PRESIDENT. PRESIDENT SHALL PRESENT CONTRACT FOR ALL OTHER EMPLOYEES.
- EMPLOYEE ADVISED TO SEEK OUTSIDE LEGAL COUNSEL FOR REVIEW OF CONTRACT.
- IF CONTRACT REVISIONS ARE NEEDED THEY ARE REVIEWED AND APPROVED BY UWGLV COUNSEL.
- CONTRACT IS SIGNED BY EMPLOYEE, BOARD CHAIR, VICE-CHAIR AND VP FINANCE & ADMINISTRATION
- COPY OF FULLY EXECUTED CONTRACT TO HR. DETAILS OF CONTRACT ARE CONFIDENTIAL AND WILL NOT BE SHARED OUTSIDE OF THE BOARD OF DIRECTORS.
- ALL EMPLOYMENT CONTRACTS SHALL FOLLOW THIS PROCESS WITH INPUT FROM THE PRESIDENT FOR ANY OF HIS/HER DIRECT REPORTS.

FORM 990, PART VI, SECTION C, LINE 18:

THE ORGANIZATION MAKES ITS FORM 990 AVAILABLE TO THE PUBLIC THROUGH THE ORGANIZATION'S WEBSITE, GUIDESTAR, CHARITY NAVIGATOR AND UPON REQUEST.

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

THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST
POLICY, AND FINANCIAL STATEMENTS AVAILABLE TO THE PUBLIC THROUGH THE ORGANIZATION'S WEBSITE.

FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS:
UNREALIZED GAINS ON BENEFICIAL INTEREST IN PERPETUAL TRUSTS 45,683.
CHANGE IN VALUE OF SPLIT INTEREST AGREEMENTS 2,849.
TOTAL TO FORM 990, PART XI, LINE 9 48,532.

FORM 990, PART XII, LINE 2C:
THE AUDIT COMMITTEE ASSUMES RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT AND SELECTION OF THE INDEPENDENT ACCOUNTANT. THIS IS UNCHANGED FROM PRIOR YEARS.

OVERHEAD RATIO
THE OVERHEAD RATIO IS AS follows:

NUMERATOR
PART IX, LINE 25, COLUMN C 1,023,460
PART IX, LINE 25, COLUMN D 1,520,078
TOTAL NUMERATOR 2,543,538

DENOMINATOR
PART VIII, LINE 12, COLUMN A 18,794,084

OVERHEAD RATIO
2,543,538 / 18,794,084 = 13.53%
**Name of the organization**

UNITED WAY OF THE GREATER LEHIGH VALLEY

**Employer identification number**

23-2657933

### Part I

| Identification of Disregarded Entities. Complete if the organization answered "Yes" on Form 990, Part IV, line 33. |
|---|---|---|---|---|---|
| (a) Name, address, and EIN (if applicable) of disregarded entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
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### Part II

| Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year. |
|---|---|---|---|---|---|
| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Exempt Code section | (e) Public charity status (if section 501(c)(3)) | (f) Direct controlling entity | (g) Section 512(b)(13) controlled entity? |
| UNITED WAY SERVICES, INC. - 23-3025771 | SECURING RESOURCES TO PENNSYLVANIA | 501(C)(3) | 170(B)(1)(A) | X |
| 1110 AMERICAN PARKWAY NE | DEVELOP HUMAN SERVICES LHA |
| ALLENTOWN, PA 18109 | INITIATIVES IN LEHIGH | PENNSYLVANIA |
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For Paperwork Reduction Act Notice, see the instructions for Form 990.

SEE PART VII FOR CONTINUATIONS
### Identification of Related Organizations Taxable as a Partnership

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Direct controlling entity</th>
<th>(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)</th>
<th>(e) Share of total income</th>
<th>(f) Share of end-of-year assets</th>
<th>(g) Disproportionate allocations?</th>
<th>(h) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(j) General or managing partner?</th>
<th>(k) Percentage ownership</th>
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### Identification of Related Organizations Taxable as a Corporation or Trust

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Direct controlling entity</th>
<th>(e) Type of entity (C corp, S corp, or trust)</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Percentage ownership</th>
<th>(i) Section 512(b)(13) controlled entity?</th>
<th>(k) Percentage ownership</th>
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</table>

Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.
**Part V  Transactions With Related Organizations.** Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

1. During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

   | a | Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity |
   | b | Gift, grant, or capital contribution to related organization(s) |
   | c | Gift, grant, or capital contribution from related organization(s) |
   | d | Loans or loan guarantees to or for related organization(s) |
   | e | Loans or loan guarantees by related organization(s) |
   | f | Dividends from related organization(s) |
   | g | Sale of assets to related organization(s) |
   | h | Purchase of assets from related organization(s) |
   | i | Exchange of assets with related organization(s) |
   | j | Lease of facilities, equipment, or other assets to related organization(s) |
   | k | Lease of facilities, equipment, or other assets from related organization(s) |
   | l | Performance of services or membership or fundraising solicitations for related organization(s) |
   | m | Performance of services or membership or fundraising solicitations by related organization(s) |
   | n | Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) |
   | o | Sharing of paid employees with related organization(s) |
   | p | Reimbursement paid to related organization(s) for expenses |
   | q | Reimbursement paid by related organization(s) for expenses |
   | r | Other transfer of cash or property to related organization(s) |
   | s | Other transfer of cash or property from related organization(s) |

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

<table>
<thead>
<tr>
<th>(a) Name of related organization</th>
<th>(b) Transaction type (a-s)</th>
<th>(c) Amount involved</th>
<th>(d) Method of determining amount involved</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(1)</strong> UNITED WAY SERVICES, INC.</td>
<td>N</td>
<td>0.</td>
<td></td>
</tr>
<tr>
<td><strong>(2)</strong> UNITED WAY SERVICES, INC.</td>
<td>O</td>
<td>0.</td>
<td></td>
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<tr>
<td><strong>(3)</strong></td>
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<td><strong>(4)</strong></td>
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<td><strong>(6)</strong></td>
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</tbody>
</table>
### Part VI Unrelated Organizations Taxable as a Partnership

Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

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

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of entity</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)</th>
<th>(e) Are all partners sec. 501(c)(3) orgs.?</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Disproportionate allocations?</th>
<th>(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(j) General or managing partner?</th>
<th>(k) Percentage ownership</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Yes/No</td>
<td>Yes/No</td>
<td>Yes/No</td>
<td>Yes/No</td>
<td>Yes/No</td>
<td>Yes/No</td>
<td>Percentage ownership</td>
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</tbody>
</table>
PART II, IDENTIFICATION OF RELATED TAX-EXEMPT ORGANIZATIONS:

NAME, ADDRESS, AND EIN OF RELATED ORGANIZATION:

UNITED WAY SERVICES, INC.

EIN: 23-3025771

1110 AMERICAN PARKWAY NE

ALLENTOWN, PA 18109

PRIMARY ACTIVITY: SECURING RESOURCES TO DEVELOP HUMAN SERVICES INITIATIVES IN LEHIGH VALLEY

DIRECT CONTROLLING ENTITY: N/A
Application for Automatic Extension of Time To File an Exempt Organization Return

File a separate application for each return.

Information about Form 8868 and its instructions is at www.irs.gov/form8868.

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/efile, click on Charities & Non-Profits, and click on 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

<table>
<thead>
<tr>
<th>Type or print</th>
<th>Name of exempt organization or other filer, see instructions.</th>
<th>Employer identification number (EIN) or Social security number (SSN)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UNITED WAY OF THE GREATER LEHIGH VALLEY 23-2657933</td>
<td></td>
</tr>
</tbody>
</table>

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

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

I request an automatic 6-month extension of time until MAY 15, 2019, to file the exempt organization return for the organization named above. The extension is for the organization’s return for:

1 calendar year or

X tax year beginning JUL 1, 2017 and ending JUN 30, 2018.

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.
Certificate number: 09001
(N/A if initial registration)

Fiscal year ended: 06/30/2018
(MM DD YYYY)

FEIN: 23-2657933

1. Legal name of organization: UNITED WAY OF THE GREATER LEHIGH VALLEY

☐ Check if name change and give previous name

2. All other names used to solicit contributions:

3. Contact person: DEBRA KLOCZEK Contact’s E-mail: DEBBIEK@UNITEDWAYGLV.ORG

4. Physical address of organization: Mailing address: (If different than physical)

1110 AMERICAN PARKWAY NE, NO.

F-120

ALLENTOWN

PA 18109

County: LEHIGH Phone number: 610-807-5755

800 number:

Fax number: 610-867-7255

Email (if different than Contact’s email):

Website: WWW.UNITEDWAYGLV.ORG

5. Type of organization (e.g. non-profit corporation, unincorporated association, etc.): NON-PROFIT CORPORATION

Where established: PENNSYLVANIA Date established: 05/14/1991

*Initial registrants must submit copies of organizational documents such as charter, articles of incorporation, constitution or other organizational instrument and by-laws.
Persons or organizations which solicit contributions for the relief of a specific individual, when all of the contributions collected are turned over to the named beneficiary for his/her use without any deductions and provided that all contributions collected shall be held in trust.

Organizations which only solicit within the membership of the organization by other members of the organization. The term “membership” shall not include those persons who are granted a membership solely upon making a contribution as the result of solicitation. “Member” means a person having membership in a nonprofit corporation, or other organization, in accordance with the provisions of its articles of incorporation, bylaws or other instruments creating its form and organization and having bona fide rights and privileges in the organization such as the right to vote, to elect officers and directors, to hold office or position as ordinarily conferred on members of such organizations.

Organizations which receive gross contributions of no more than $25,000 per fiscal year whose fundraising activities are carried on only by volunteers, members, officers or permanent employees and only permanent employees are compensated for those fundraising activities.

Veterans organizations chartered under Federal law, organizations of volunteer firemen, ambulance associations, rescue squad associations and their auxiliaries or affiliates, which are not exempt from registration, did not receive gross contributions in excess of $100,000 and did not use a professional solicitor.

Not Applicable

Charitable organizations which check boxes §162.7(a)(1) - §162.7(a)(4) are not required to file a financial report with this registration. If “Not Applicable” is checked, the charitable organization must submit financial reports which are audited, reviewed, compiled or internally prepared. See Instructions.

Items 8 and 9 are required to be completed by initial registrants only

8. Date organization first solicited contributions from Pennsylvania residents:  

   Other:  

9. If organization solicited Pennsylvania residents and received gross* contributions totaling more than $25,000 in any given fiscal year, provide the date the organization first received contributions totaling more than $25,000.  

   Other:  

   *Includes contributions received both within and outside Pennsylvania before any deductions or expenses.
10. Has the organization been granted IRS tax-exempt status?  
   - Yes  
   - No  
   
   A. If "Yes," under which IRS code section: 501(C)(3) and attach a copy of the IRS exemption letter if not previously submitted.  

11. Was the organization required to file any type of IRS 990 return, including 990, 990EZ, 990PF or 990N and applicable schedules, for its most recently completed fiscal year?  
   - Yes  
   - No  
   
   (If "Yes," attach a copy of the most recently filed 990, 990EZ, 990PF or 990N and include all schedules. If "No," attach an explanation of why the organization is exempt from filing an IRS 990 return. An organization that is not required to file an IRS 990 return or an organization that files a 990N, 990EZ or 990PF, must file a Pennsylvania public disclosure form (BCO-23).)  

12. Manner in which contributions are solicited (e.g. direct mail, telephone, internet, etc.):  
   WORKPLACE CAMPAIGN PRESENTATIONS, DIRECT MAIL, TELEPHONE, SOCIAL MEDIA, EVENTS, INDIVIDUAL MEETINGS  

13. A clear description of the specific programs for which contributions are used or will be used, and a statement describing whether such programs are planned or in existence.  
   TO ADVANCE THE COMMON GOOD BY FOCUSING ON INCREASING THE NUMBER OF THIRD GRADE STUDENTS READING AT GRADE LEVEL BY 50%; REDUCE THE NUMBER OF PEOPLE IN THE LEHIGH VALLEY WHO ARE FOOD INSECURE BY 50%; INCREASE THE NUMBER OF OLDER ADULTS WHO HAVE THEIR BASIC NEEDS MET AT HOME BY 50%; AND THAT LEHIGH VALLEY RESIDENTS RECEIVE SUPPORT FOR EMERGENCIES AND BASIC NEEDS.  

14. Is the organization registered to solicit contributions in any other state or municipality?  
   - Yes  
   - No  
   
   (If "Yes," list all states and municipalities. Attach a separate sheet if necessary.)  

15. Is any person compensated, or does the organization intend to compensate any person, who solicits contributions in Pennsylvania, including, but not limited to, employees of the organization and professional solicitors?  
   - Yes  
   - No  
   
   (Do not check "Yes" if the organization only uses or intends to only use a professional fundraising counsel.)  
   
   If "Yes," give the date the person or entity started or will start soliciting contributions from Pennsylvania residents:  
   05/14/1991  

16. Names, addresses, and telephone numbers of all professional solicitors the organization uses or intends to use to solicit contributions from Pennsylvania residents. For each entry, include the beginning and ending dates of all contracts and dates Pennsylvania residents were first solicited, or will be solicited:  
   
   SEE STATEMENT 1
17. Names, addresses, and telephone numbers of all professional fundraising counsel the organization uses or intends to use to provide services with respect to the solicitation of contributions from Pennsylvania residents. For each entry, include the beginning and ending dates of all contracts and dates services began, or will begin, with respect to soliciting contributions from Pennsylvania residents: (Attach a separate sheet if necessary)

SEE STATEMENT 2

18. Names, addresses, and telephone numbers of any commercial coventurers under contract with the organization: (Attach a separate sheet if necessary)

NONE

19. If the registering charity is a parent organization located in Pennsylvania, does the organization elect to file a combined registration covering all of its Pennsylvania affiliates? (See note "Affiliate and Parent Organization")

☐ Yes ☐ No ☒ Not Applicable

If "Yes," give all names and certificate numbers of the affiliate organizations:

(Each affiliate whose parent organization files an IRS 990 group return must submit a copy of the parent organization’s 990 group return and file a public disclosure form (BCO-23) for each affiliate.)

20. Is the registering charity a Pennsylvania affiliate of a parent organization, which elected to file a combined registration on the registering charity’s behalf? (See note "Affiliate and Parent Organization")

☐ Yes ☒ No ☐ Not Applicable

If "Yes," provide the name and, if available, certificate number of the parent organization.

(Each affiliate whose parent organization files an IRS 990 group return must submit a copy of the parent organization’s 990 group return and file a public disclosure form (BCO-23) for each affiliate.)

Legal name of parent organization

Pennsylvania certificate number

21. Provide the names and addresses of all officers, directors, trustees and principal salaried executive staff officers. (Attach separate sheet if necessary. A reference to the 990 or the BCO-23 is not sufficient.)

SEE STATEMENT 3
UNITED WAY OF THE GREATER LEHIGH VALLEY

22. Names of the individuals or officers of the organization who: (Attach a separate sheet if necessary)

A. Are in charge of solicitation activities:

BOARD OF DIRECTORS

1110 AMERICAN PARKWAY NE F-120 ALLENTOWN, PA 18109

B. Have final responsibility for the custody of contributions:

BOARD OF DIRECTORS

1110 AMERICAN PARKWAY NE F-120 ALLENTOWN, PA 18109

C. Have final responsibility for final distribution of contributions:

BOARD OF DIRECTORS

1110 AMERICAN PARKWAY NE F-120 ALLENTOWN, PA 18109

D. Are responsible for custody of financial records:

SEE STATEMENT 4

23. Are any officers, directors, trustees, or employees related by blood, marriage, or adoption to:

A. Any other officer, director, trustee, or employee? Yes ☐ No ☒

B. Any officer, agent, or employee of any professional fundraising counsel or solicitor under contract with organization? ** Yes ☐ No ☒

C. Any officers, agents or employees of any supplier or vendor providing goods or services? ** ☐ Yes ☒ No

**(this includes any officer, director, trustee, or employee of the charitable organization who is also an officer, director, trustee, employee or owner of a professional fundraising counsel, professional solicitor, supplier or vendor)

If “Yes” is checked to any of the above, attach a list of related individuals including names, business, and residence addresses of related parties.

24. Has the organization or any of its present officers, directors, executive personnel or trustees ever:

A. Been found to have engaged in unlawful practices in the solicitation of contributions or administration of charitable assets or been enjoined from soliciting contributions or currently has such proceedings pending in this or any other jurisdiction? Yes ☐ No ☒

B. Had its registration or license to solicit contributions denied, suspended, or revoked by any governmental agency? Yes ☐ No ☒

C. Entered into any legally enforceable agreement (such as a consent agreement, an assurance of voluntary compliance or discontinuance or any similar agreement) with any district attorney, Office of Attorney General, or other local or state governmental agency? Yes ☐ No ☒

(If "Yes" is checked in response to any of the above, attach a written explanation, including the reasons for actions, and copies of all relevant documents.)
UNIVERSITY OF THE GREATER LEHIGH VALLEY

Certification - This registration statement must be signed by two different officers of the organization, one of whom shall be the chief fiscal officer or the equivalent.

I certify that the information provided in this registration, including all statements and attached documentation, is true and correct to the best of my knowledge, information and belief. I understand that the falsification of any statement or documentation made is subject to the penalties of 18 Pa.C.S. §4904 (relating to unsworn falsification to authorities) and 10 P.S. §162.17 (relating to administrative enforcement and penalties).

Signature of Chief Fiscal Officer

Date

Type or print name and title of Chief Fiscal Officer

Signature of Other Authorized Officer

Date

Type or print name and title of Other Authorized Officer

Checklist for registration:

☐ Completed registration statement properly signed and dated.

☐ A copy of the IRS 990/990EZ/990PF/990N Return and required schedules, signed and dated by an authorized officer

☐ Public Disclosure Form BCO-23 (if required)

☐ Applicable Financial Statements (audited, reviewed, compiled or internally prepared)

☐ Registration fee and any late filing fees

☐ Initial Registrants Only: IRS determination letter, articles of incorporation or charter and by-laws.

See Instructions for more information on completing this form and attachments.
FORM BCO-10  ALL PROFESSIONAL SOLICITORS  STATEMENT 1

NAME AND ADDRESS       PHONE NUMBER

NONE

CONTRACT BEGIN DATE   CONTRACT END DATE   SOLICIT DATE

FORM BCO-10  PROFESSIONAL FUNDRAISING COUNSELS  STATEMENT 2

NAME AND ADDRESS       PHONE NUMBER

NONE

CONTRACT BEGIN DATE   CONTRACT END DATE   SERVICE DATE

FORM BCO-10  OFFICERS, DIRECTORS, TRUSTEES AND EXECUTIVES  STATEMENT 3

NAME AND ADDRESS       TITLE

DAVID LEWIS
1110 AMERICAN PARKWAY NE, NO. F-120
ALLENTOWN, PA  18109

NAME AND ADDRESS       TITLE

MARCI LESKO
1110 AMERICAN PARKWAY NE, NO. F-120
ALLENTOWN, PA  18109

NAME AND ADDRESS       TITLE

PETER RUGGIERO
1110 AMERICAN PARKWAY NE, NO. F-120
ALLENTOWN, PA  18109
<table>
<thead>
<tr>
<th>NAME AND ADDRESS</th>
<th>TITLE</th>
</tr>
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<tbody>
<tr>
<td>ANNE BAUM</td>
<td>BOARD MEMBER</td>
</tr>
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<td>1110 AMERICAN PARKWAY NE, NO. F-120</td>
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<td>ALLENTOWN, PA 18109</td>
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<tr>
<td>MEGAN BESTE</td>
<td>BOARD MEMBER</td>
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<tr>
<td>1110 AMERICAN PARKWAY NE, NO. F-120</td>
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<tr>
<td>WENDY BORN</td>
<td>BOARD MEMBER</td>
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<tr>
<td>THOMAS DAUB</td>
<td>BOARD MEMBER</td>
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<td>TRISHA R. HIGGINS, CPA</td>
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<td>JOHN MARZANO</td>
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## UNITED WAY OF THE GREATER LEHIGH VALLEY

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<thead>
<tr>
<th>NAME AND ADDRESS</th>
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<tr>
<td>DAVID NOEL 1110 AMERICAN PARKWAY NE, NO. F-120</td>
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<td>THOMAS PARKER 1110 AMERICAN PARKWAY NE, NO. F-120</td>
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<td>DR. AMEESH PATEL 1110 AMERICAN PARKWAY NE, NO. F-120</td>
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<tr>
<td>DR. JOSEPH ROY 1110 AMERICAN PARKWAY NE, NO. F-120</td>
<td>BOARD VICE CHAIR</td>
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</table>
UNITED WAY OF THE GREATER LEHIGH VALLEY
23-2657933

NAME AND ADDRESS                     TITLE
ASHLEY RUSSO                         BOARD MEMBER
1110 AMERICAN PARKWAY NE, NO. F-120  ALLENTOWN, PA 18109

NAME AND ADDRESS                     TITLE
SALEEM SAAB                          BOARD MEMBER
1110 AMERICAN PARKWAY NE, NO. F-120  ALLENTOWN, PA 18109

NAME AND ADDRESS                     TITLE
DR. BILL SCHANINGER                  BOARD MEMBER
1110 AMERICAN PARKWAY NE, NO. F-120  ALLENTOWN, PA 18109

NAME AND ADDRESS                     TITLE
JOHN WERKHEISER                      BOARD MEMBER
1110 AMERICAN PARKWAY NE, NO. F-120  ALLENTOWN, PA 18109

FORM BCO-10                         CUSTODY OF FINANCIAL RECORDS  STATEMENT 4

NAME AND ADDRESS
DAVID LEWIS, PRESIDENT              
1110 AMERICAN PARKWAY NE F-120 ALLENTOWN, PA 18109

NAME AND ADDRESS
DEBRA KLOCEK, VP OF FINANCE AND ADMINISTRATION
1110 AMERICAN PARKWAY NE F-120 ALLENTOWN, PA 18109

FORM BCO-10                         RELATED SUPPLIER OR VENDOR  STATEMENT 5

NAME AND ADDRESS
ASR MEDIA PRODUCTIONS               
410 MAIN ST HELLERTOWN, PA 18055

BUSINESS
BOARD MEMBER ASHLEY RUSSO IS THE OWNER