

# Application Form

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## *Organization Information*

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If you would like to complete this application in Word first and copy your answers over later, use the following link: [Download Application](#)

The evaluation rubric that will be used to score your request is now available here: [Download Rubric](#)

Please pay attention to character limits while working on your draft. These limits include spaces.

### Organization Name\*

United Way Suncoast

### Proposal Name\*

Please choose a short name to identify this project within the grant portal:

Technology Updates to Support Pinellas ALICE Families

### EIN\*

59-3725701

### Incorporation Year\*

What year did your organization incorporate? This will be the year listed on your determination letter from the Internal Revenue Service.

1924

### Organizational Mission Statement\*

What is your organization's mission statement? This should be no longer than one or two sentences.

To provide leadership that improves lives and creates lasting community change by mobilizing the caring people of our communities to give, advocate, and volunteer. United Way Suncoast provides pathways to education and financial stability that give everyone in our community the freedom to rise.

### Unique Entity ID (SAM)

Please provide your organization's Unique Entity ID number. This is a specific number used by the federal government to identify your organization. **This is different from a DUNS number, which the federal government no longer uses.**

If you do not have a Unique Entity ID number, you can create an account on SAM.gov and apply for one here (it is free and may take 3-4 days for approval): <https://sam.gov/content/home>

This field is optional as to not stop a qualifying organization from applying. **However**, a Unique Entity ID number will be required if your organization is approved for a grant. Your organization should apply for a number now if it does not yet have one.

Character Limit: 12

WNLZLSAA2H23

### Annual Operating Budget Size\*

Please provide the amount of your annual operating budget, (expenditures only) for your entire organization.

\$17,923,515.00

### Amount Requested\*

The maximum grant amount is \$199,999.

\$92,871.00

### Parent Non-Profit/Subsidiaries\*

If your organization has a parent non-profit that has multiple subsidiaries, will multiple subsidiaries be applying in this process?

#### Example

Better Tomorrow is the parent non-profit of three organizations. Two of those organizations want to apply in this process. Both would select "Yes" on this question.

No

## *Request Specifics*

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### Organization Programmatic Background\*

Please describe the programming your organization offers to the community and the length of time it has been doing so. What does your organization **do** and **how long** has it been doing it?

United Way Suncoast has been serving the Suncoast community for nearly 100 years, since 1924, working tirelessly to eliminate the constraints that prevent families from thriving. In July 2002, the United Ways of Hillsborough and Pinellas counties combined operations to better serve the Tampa Bay region. A decade later, UW of Sarasota consolidated creating United Way Suncoast — representing a four-county region including DeSoto. And in 2017, the UW of Manatee joined the Suncoast region bringing the total number of counties served to five. For some programs, UWS provides leadership and staffing to organize resources and

serve as a bridge between partner agencies. For other programs, UWS supports by funding partners to deliver needed services. And, when impactful, UWS provides the services themselves.

This request supports UWS led work in Pinellas County: Volunteer Income Tax Assistance (VITA) and two UWS Neighborhood Resource Centers-Campbell Park in St. Petersburg and North Greenwood in Clearwater. Both the VITA program and Neighborhood Resource Centers serve residents countywide. North Greenwood Resource Center opened in 2012 and the Campbell Park Resource opened in 2017. UWS has led the VITA program in Pinellas for nearly a decade.

United Way Suncoast's financial stability initiatives and the resource centers follow a two-pronged approach: 1) Working with clients on access to services, employment preparation and retention (resume, mock interviews, soft skills, etc.) and 2) Cultivate and maintain relationships with community partners and prospective employers. These services include Financial Case Management (Rental, Utility, Water, and other emergencies), On Site Food Bank, Transportation Assistance, Financial Education Workshops (Savings, debt management, home buyer, identity theft, & others), Free Tax Preparation (VITA), Legal Assistance, Financial goal setting/coaching, and Workforce Development-CNA/Phlebotomy Certifications.

## Community Need\*

Please describe the community need that exists for your programming. If you are able to cite quantitative, local data, that will strengthen your proposal.

For many families making ends meet is a challenge that requires sacrifices. Income stability is crucial in developing an environment conducive to learning, mental health, and wellness. 43% of Suncoast households are struggling financially. When earned wages don't support the basic needs of a family and when debt and lack of money management skills rob individuals of their dreams, a cycle of generational poverty can have implications for present and future generations. UWS calls this the ALICE (Asset-limited, Income Constrained, Employed) population. Over 2/3 of the Suncoast community are considered financially illiterate and 44% of Suncoast households or ALICE families cannot afford an unexpected expense of \$400 (FDIC 2019).

The ALICE Report, which describes a survival budget for an average Florida household (2 adults, 1 infant, and 1 preschooler) describes that in order for a family to afford basic needs (housing, childcare, food, transportation, health care, and taxes) as of 2021, a household needs at least combined income of \$54,084 to survive in Pinellas County.

UWS work supports two areas of focus identified in the Pinellas County Community Health Needs Assessment: Socioeconomic factors and collaborative partnerships. For any person in the community, UWS offers tools to increase financial stability through various interventions including VITA, Bank On, workforce development programs, and financial coaching and the Resource Centers work in coordination to provide these opportunities or to navigate resident's public benefit opportunities or partner programs/services. These programs aim to increase asset development by working with residents to provide free tax preparation, access to banking supports, certificate training, and nonpredatory volunteers who have financial expertise to provide financial education. Collectively with strategic community partners, UWS provides opportunities for all in our community with the freedom to rise.

## Negative Economic Impact on Organization\*

**The following question is the keystone of a strong application in this process. If your organization cannot demonstrate a negative economic impact from the pandemic, your application will not qualify for committee review. If you are uncertain about what constitutes negative economic impact or how to demonstrate it, please**

**contact PCF staff for technical assistance.**

Describe your organization's negative economic impact arising from the COVID-19 pandemic. Examples could include:

- A reduction in revenue from 2019 to 2020
- Inflationary pressures
- Increases in demand for services that have not been compensated for through new revenue
- The use of reserves for unbudgeted expenses since the onset of the pandemic, and such use of reserves has prevented the purchase of capital assets
- A need for capital assets to offset community need for which your organization does not have the resources to purchase due to the negative economic harm from the pandemic
- A need for additional capital assets to adapt operations to accommodate health and safety guidelines by the CDC
- Growth in restricted pandemic-related revenue that does not permit capital asset acquisition

**You have the option to upload supporting documentation regarding negative economic impact. However, please limit your upload to no more than five pages.**

**Note: If you are applying for both a Small Purchase and Large Project, you may reuse the answer for this question PROVIDED THAT the negative economic impact is relevant to both requests. The Large Project Letter of Intent does not permit uploads to support the answer to this question.**

The United Way Suncoast in reply to the overwhelming needs the pandemic for families opened a Rapid Response Fund to support non-profit human services organizations who serve individuals and families in United Way Suncoast's five-county footprint who have been affected by COVID-19. United Way Suncoast seeded the fund with \$150,000 in reserves. United Way Suncoast supported organizations whom served 100% low to moderate income families in the priority categories of \* Emergency Food Assistance, Food Bank Supports, Housing Stability Needs, Benefits Enrollment, Shelter, Utility Bills, Medical Bills, Mental Health Needs, Mortgage Payments, and Childcare. In addition to the fund, United Way Suncoast created a centralized Coronavirus Assistance Center which provided resources and information for our local community with links to a variety of resources including foodbanks, SBA loans, educational resources for students, free online tax prep, and much more to help individuals and families navigate these challenging times. Individual requests for support were managed through our funded partnerships with local 2-1-1s.

The on-the-groundwork of UWS' local resource centers had to expand as with new resources and virtual capabilities. UWS trained team members and volunteers to provide navigation of Emergency Rental Assistance funds for tenants and landlords. Additionally, with economic stimulus payments from the CARES Acts and American Rescue Plans for individuals tied to tax returns, UWS saw an increase in the need for Volunteer Income Tax Assistance. While many VITA programs were unable to operate in 2020 due to scarcity of volunteers, UWS continued services and increased spending on resources to begin to adapt the VITA program virtually and through drop off services. This growth has increased demand for UWS Financial Stability Initiatives and resource centers to connect residents and volunteers virtually.

With the closing of many workplaces in 2020 and the financial instability of the pandemic, United Way Suncoast had a significant loss in fundraising from its traditional workplace campaigns and did not put on any in person fundraising events. Businesses closed their doors and put many employees on furlough, which hindered UWS from entering those workplaces to ask team members to give through payroll deductions or receiving deductions as team members were laid off or furloughed. UWS estimates a close to \$2 million loss in fundraising campaign revenue in 2020. UWS received a PPP loan of \$1MM in 2020 that was forgiven in 2021, but that still did not cover the loss in campaign fundraising revenue or the increase in expenses for new program support and services because of COVID-19.

## Proposal Description\*

The American Rescue Plan Act requires a request that is reasonable and proportional to the level of economic impact your organization experienced. This means the request you describe below should not be greater than the economic harm your organization has suffered.

Please describe your purchase proposal and address the following:

- What will you be purchasing with these funds?
- What is the estimated lifespan of the purchase/improvement?
- How does it address the negative economic harm you described in the previous question?

The VITA program and UWS Resource Centers in tandem in 2020/2021 updated and trained team members to provide services virtually which resulted in increased training, equipment, and software costs to pivot these support services on top of UWS' campaign and event fundraising losses. By purchasing laptops and tablets to update outdated equipment for VITA, this grant would empower volunteers with up-to-date technology to support residents to receive tax returns and stability supports--bringing a positive outcome of economic impact back to Pinellas and supporting the investments and enhancement UWS has already expended to transform the programs virtually. UWS will continue in-person sites and updating printers, scanners, and tablets would increase the quality and ease of service the financial stability initiatives can provide residents. In non-tax season months, UWS can temporarily repurpose equipment to support volunteers in other financial stability initiatives for year-round use.

The networking equipment consists of the Firewalls, Switches, and Wireless Access Points. The Firewall is a gate with a security system. It says which internet traffic can come in and what can go out. The Switches control the ports getting internet in the wall and sends the internet from the firewall to the Wireless Access Points. Data and IT security is important to protect clients and the organization. UWS is in need to replace the equipment as some of it is not owned by United Way Suncoast and was leased from a vendor which is expiring. The parts UWS does own, UWS is seeking to replace to stick with 1 or 2 manufacturers of its networking equipment as opposed to it being a Hodge-podge of different IT vendors which can complicate IT and increase costs. Supporting this request will decrease future operating costs.

The current Resource Centers, each with their own computer lab desktops and laptops are needing to be upgraded due to them being too old according to Microsoft standards. The laptops and desktops are used by the community to get access to resources they need for life. Many federal, state, and local benefits must be completed through online applications. The computer labs at each center serve as a public use for residents to find job postings, edit resumes, and support students completing their online assignments, participate in virtual school, or complete GED or retention credits.

UWS expects all these technology updates to last at minimum 3 to 5 years.

## Guiding Principles - Client Impact\*

The American Rescue Plan Act, which provides the funding for this grant program, aims to ensure an equitable recovery from the COVID-19 pandemic. The term "equity" is defined as:

The consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment, such as Black, Latino, and

Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color; members of religious minorities; lesbian, gay, bisexual, transgender, and queer (LGBTQ+) persons; persons with disabilities; persons who live in rural areas; and persons otherwise adversely affected by persistent poverty or inequality.

One of the guiding principles of this fund is that it will apply a lens of equity to ensure the needs of specified priority populations are met.

**Will this purchase benefit the community members defined above that have experienced disproportionate negative impacts from the COVID-19 pandemic? If so, how?**

UWS VITA program supports low income residents with a household income of \$74,000 or less, keep their hard-earned money by offering free income tax preparation. The VITA program increases the amount of disposable income for hard-working families by saving them an average of \$200 on tax preparation and ensuring they receive all the tax credits they are eligible for, including the Earned Income Tax Credit (EITC) and the Child Tax Credit (CTC), which can give families thousands of extra dollars to support themselves. During the 2021 tax season, in Pinellas County, 2,282 tax returns were prepared by trained VITA volunteers equating to \$4,324,382 in money back to Pinellas families' wallets (\$570,720 in fees saved and \$3,753,662 in refunds). Additionally, community members received \$1,872,464 in total credits (EITC \$1,076,753, child tax credit \$57,761 and additional CTC \$737,950). The recipients of EITC tend to spend their credits quickly and locally, which produces an estimated community economic impact "multiplier effect" of \$1.50 to \$2.00 for each \$1 in EITC received.

North Greenwood is a neighborhood located near downtown Clearwater. Total population in this neighborhood is about 2,000 with almost 50% living at or below the poverty line. The population is characterized as 77.6% Black/African American / 16% White and 6.9% Hispanic or Latino.

Campbell Park is a neighborhood located in South St. Petersburg. Total population in this neighborhood is about 5,000 with almost 53% living at or below the poverty line. The population is characterized as 86% Black/African American, 7.8% Two or more races, 3% White, and 2.1% Hispanic or Latino.

The demographics of residents receiving supports from United Way Suncoast vary in terms of age and type of support, but a consistent theme among those served in these programs is a high number of persons of color, single parents with children, low-income, unemployed persons, and persons with disabilities.

## Number Served\*

How many people will directly benefit from this capital purchase annually?

3000

## Unduplicated vs. Duplicated\*

Is the number indicated above duplicated or unduplicated?

**Duplicated:** A client is counted each time they access services

**Unduplicated:** A client is counted once, regardless of the number of times they access services

**Example:** ABC Food Bank operates two mobile food pantries, one in Clearwater and one in St. Petersburg. Taylor, a Pinellas County resident, goes to both food pantries. If ABC Food Bank counts Taylor's visit TWICE, it is **duplicated**. If ABC Food Bank counts Taylor's visit ONCE, it is **unduplicated**.

Other (Explanation Required Below)

## Other (Explanation Required)

If you selected "Other" in the previous question, please explain how your organization determined the number of clients that will benefit from the proposed capital purchase.

The program goal for 2022 filing season is to prepare returns for 2,200 low-wage households in Pinellas matching the outcomes of the 2021 filing season for the county. Residents walking into United Way Suncoast's Resource Centers, on average, are facing more than one challenge for themselves or their family. In 2021/2022, UWS served over 900 unduplicated clients at the Campbell Park Resource Center and served over 400 unduplicated clients at the North Greenwood Resource Center. United Way Suncoast does not currently track whether a resident who received VITA services whether at a resource center, in-person site, or virtually is also a client of the neighborhood resource centers. UWS program managers would attest that an estimate of the number of residents seeking both services is low and majority unduplicated.

The American Rescue Plan Act (ARPA) prioritizes organizations that either have headquarters or carry out the majority of their operations inside Qualified Census Tracts (QCTs). QCTs are a standard method of identifying communities with a large proportion of low-income residents. The U.S. Department of Housing and Urban Development determines what areas qualify as QCT.

To assess if your organization serves or is headquartered in a QCT, use the following link:

[https://www.huduser.gov/portal/sadda/sadda\\_qct.html](https://www.huduser.gov/portal/sadda/sadda_qct.html)

In the top right-hand corner, choose the state of Florida and Pinellas County. Then on the left-hand side of the screen, click the box next to "Color QCT Qualified Tracts." The QCT zones are denoted in purple. You can also map your address by adding it into the address box at the top to see if your location is inside the zones.

Below, please provide the location of your operations and the location of your headquarters, if different.

### Headquarters Location\*

Please provide your organization's headquarters address as it appears on your Sunbiz account. To check your Sunbiz registration, you may search here: <https://dos.myflorida.com/sunbiz/search/>  
5201 W. Kennedy Blvd, Ste 600, Tampa, FL 33609

### QCT Determination - Headquarters\*

Is this organization headquartered in a QCT?



No

## Purchase Location\*

Where will the majority of the activities related to the purchase(s) take place?

### Examples

- If you are proposing the purchase of a van that will deliver to multiple areas within Pinellas County, specifically mention what areas those are.
- If your purchase enables remote access to your services, such as telehealth, provide geographical data around where the majority of your clients reside (presuming they will access your services from their residence).

United Way Suncoast operates in five counties throughout the greater Tampa Bay on the west coast of Florida- Pinellas, Hillsborough, Sarasota, Manatee, and DeSoto counties. The funds for this request be specifically for Pinellas County residents at large with the VITA program (in-person and virtually), UWS financial stability initiatives, and a focus on Pinellas residents in the surrounding neighborhoods of Campbell Park in St. Petersburg and North Greenwood in Clearwater (both locations are located in and serve residents with Qualified Census Tracts). All residents of Pinellas County are welcomed in UWS' Resource Centers.

North Greenwood Resource Center- 1310 North MLK Jr. Ave Clearwater, FL 33755  
Campbell Park Resource Center- 701 6th St S., Building 7. St. Petersburg, FL 33705

UWS operates in person VITA sites in Pinellas at:

- \*Americana Cove
- \*Campbell Park
- \*Childs Park YMCA
- \*Daystar Life Center
- \*Enoch Davis Center
- \*Goodwill St Pete
- \*GRAYDI NFC
- \*Hispanic Outreach Center
- \*Lealman and Asian Family Center
- \*Mattie Williams NFC
- \*MLK
- \*Tampa Bay Beaches Chamber of Commerce
- \*VA Center for Development and Civic Engagement

Mobile sites:

- \*BayCare Health
- \*Morton Plant Hospital
- \*St. Anthony's Hospital

## QCT Determination - Purchase\*

Does this organization's proposed purchase benefit residents of QCTs?

Yes

## *Community Connection*

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This section aims to capture general demographic data about your organization and to see how you engage with and represent the community you serve. PCF has generalized the demographic data questions more than it has in other processes because of the public nature of this process. PCF understands that identity disclosure can be a sensitive matter, and wants to respect your organization's board and staff. If your organization feels comfortable sharing more detailed demographic information, it may do so in the "Community Representation and Connection" section.

### **Community Representation and Connection\***

Describe how your organization is representative of, or has authentic connections to, the community your proposal seeks to serve. You can list other community-based organizations that work on programming with you and/or list examples of your work within this community.

United Way Suncoast defines low to moderate income populations using the federal poverty line but takes it a step further with a research-based report, ALICE report, which presents per county the population living above the poverty level yet have a difficult time affording the basics of housing, food, health care, childcare and transportation, despite working. ALICE is an acronym for Asset Limited, Income Constrained, Employed – households that earn more than the Federal Poverty Level, but less than the survival budget of living in different parts of the county (the ALICE Threshold). The ALICE families are hardworking and tax-paying individuals who go to work every day providing essential services in our community. From 2018 ALICE Report, 46% of Florida families are consider living below the ALICE Threshold. The number of households below the ALICE Threshold changes over time; households move in and out of poverty and their ALICE status as their circumstances improve or worsen.

United Way Suncoast operates its community resource center in North Greenwood in partnership with the City of Clearwater, Clearwater Police Dept., Pinellas County School District and St. Pete College. The Resource Center, located in a renovated police substation, provides information and referral for social services, financial assistance, youth services, and employment services for residents in this neighborhood. The Campbell Park Resource Center (CPRC) holds defined partnerships with Bay Area Legal Services, Feeding Tampa Bay, Suncoast Center, Pinellas County Urban League, Evara Health, and Pinellas County Schools to provide critical services around food insecurity, eviction prevention, job readiness, workforce development, health, and emergency needs.

UWS convenes a regional network of financial institutions, nonprofits, and municipalities, as the founding and leading agency for the Financial Stability Network (FSN), serving Pinellas and Hillsborough County, this group has over 60 active organizations represented and meet every other month to "Connect, Learn, Collaborate." Partners within these 60 organizations includes the National Disability Institute, which focuses on the financial health and well-being of people with disabilities; Disability Achievement Center, which is a network for individuals with disabilities; Project Prosper, which empowers local immigrants in financial stability; Hispanic Services Council, a local support for Hispanic individuals; and many others.

### **Leadership Demographics - Board Membership\***

Do your board members consider themselves a member of one or more of the following populations? Check all that apply.

- BIPOC defined as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color
- LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer+)
- Neurodiverse/physically disabled

BIPOC

### Leadership Demographics - Executive Level Leadership Team\*

Does your executive leadership team consider themselves a member of one or more of the following populations? Check all that apply.

- BIPOC defined as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color
- LGBTQ+ (Lesbian, Gay, Bisexual, Transgender, Queer+)
- Neurodiverse/physically disabled

If your organization is volunteer-run and does not have an executive leadership team, please select "Not applicable."

BIPOC

### Leadership Demographics - CEO/Executive Director\*

Does your CEO/Executive Director consider themselves a member of one or more of the following populations? Check all that apply.

- BIPOC defined as Black, Latino, and Indigenous and Native American persons, Asian Americans and Pacific Islanders and other persons of color
- LGBTQ+ defined as Lesbian, Gay, Bisexual, Transgender, Queer+
- Neurodiverse/physically disabled

If your organization is volunteer-run and does not have an executive leader, please select "Not applicable."

None of the above

## *Proposal Costs*

### Purchase Estimates/Bids\*

**You must combine all bids/estimates into one file.**

**Attach current verifiable bids, estimates, or price lists [from your potential vendor(s)]. Please ensure there is a date listed or when you obtained these estimates/bids, as they must be from within the past sixty (60) days.**

- If your purchase is **BELOW** \$75,000, you must upload TWO verifiable bids or estimates for the proposed purchases.
- If your purchase is **EQUAL TO** or **MORE THAN** \$75,000, you must upload THREE verifiable bids or estimates for your proposed purchases.

This can be as simple as screenshots from Amazon or Best Buy (though PCF does not endorse or recommend any specific vendor) or may be from specialized vendors that sell your proposed purchase. If you have concerns regarding bids or estimates, please reach out to PCF staff.

United Way Suncoast ARPA Capital Bids.pdf

### Sole Source\*

In some cases, a proposed small purchase is only available from a single vendor, and as such, only one bid/estimate can be uploaded. If this is the case for your organization, please explain in the field below. Otherwise, write "N/A" below.

N/A

### Related Parties\*

Are any of the contractors/vendors that have provided bids/estimates a related party to your organization?

#### Examples of Related Parties

- A board member that owns the contracting company that provided a bid
- The relative of a director, officer, or executive team member owns a company that provided an estimate
- The CEO of the applying organization has a financial interest in the construction company providing a bid

**If yes**, identify the vendor and describe the relationship.

**If no**, write "No related parties below."

No related parties below.

## Budget Summary\*

Please use **THIS TEMPLATE** to indicate costs and any cash match your organization may have for the proposed purchases. Note: this spreadsheet will automatically round numbers to make it easier to read for committee members.

Please note that indirect costs are not permitted for small purchases.

If you have additional notes to add to your budget summary, you may do so in the text box below.

United Way Suncoast Budget-Small-Capital-Purchases.xlsx

UWS is requesting funding for technology upgrades and replacement for equipment in UWS Neighborhood Resource Centers and the VITA program. The Laptops and Desktops in the request for the Neighborhood Resource Centers will support residents in the centers' computer labs, support student academic development, and workforce programming. These requests are higher expenses than laptops for the VITA program because UWS expects more use over time of this equipment as more residents and students will utilize them and need stronger capabilities and a onetime cost warranty. The laptops for the VITA program will be used for at least 5 months of the year by trained volunteer tax preparers who have basic computer and internet needs to support Pinellas residents. The printers, scanners, tablets, toner will be used as well by volunteers to support residents tax returns.

## Other Funding Sources\*

Please describe any other funding not already mentioned that your organization has applied for or obtained for this purchase.

This includes but is not limited to Community Block Development Grants (CBDG), local government grants (including Tourist Development Council funding), foundation grants, and private donors (you do not need to disclose donor identities but simply indicate the amount raised for this purchase). This includes any matching grants or in-kind contributions you may have obtained.

**Please be sure these other funding sources are represented in the "Applicant Match" column in the budget summary uploaded above.**

N/A

## Changes in Operating Costs\*

Please answer this question based on the descriptions below:

- If this project **increases** ongoing operational costs (programmatic, operating maintenance or other costs), how will you compensate for the difference?
- If this purchase **decreases** ongoing operating costs, how will it do so?
- If this purchase **does not affect** operating costs, please note so below.

This support would decrease ongoing operating costs for the Neighborhood Resource Centers by eliminating the need to lease current equipment will provide cost savings over the life of the equipment. UWS includes IT maintenance costs for VITA equipment and would not affect operating costs for the program. By supporting these capital requests for these programs, UWS expects these upgrades to encourage team members, volunteers, and residents to embrace technology such as having virtual appointments and communicating electronically as needed to reduce operating costs.

## *Organization Documentation*

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**Please reach out to PCF staff if you have trouble uploading the files below. We are able to assist with file conversion and file compression.**

### **Organization Budget\***

Please upload your most recent, board-approved organizational budget for this fiscal year. PDF and Excel documents are accepted.

United Way Suncoast Summary Budget FY 2023.pdf

### **Board of Directors List\***

Please upload your Board of Directors list.

Excel, Word, and PDF file formats are accepted.

All Boards Reporting Roster 6.7.22.pdf

### **IRS Form 990\***

Please upload a PDF copy of your most recently submitted IRS Form 990.

**If Form 990 from your most recent fiscal year is delayed or you have received an extension, please explain in the text space below. You may also explain if you don't have a Form 990 due to organization type.** You should still upload the most recent publicly available 990.

If you file a Form 990-EZ and do not have anything to attach, please note so below.

Only PDF files are permitted.

06\_30\_2021 IRS 990 UW Suncoast\_Public Disclosure.pdf

### **Most Recent Financial Statements\***

Upload a PDF version of your most recent financial statements. If you have audited financial statements, please upload the most recently conducted audit. If you do not have a recent audit, please explain why.

06\_30\_2021\_Audited Financials\_UW Suncoast.pdf

## *Insurance Requirements*

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### **Evidence of Insurance Coverage\***

Grantees of the ARPA Nonprofit Capital Project Fund will be required to maintain appropriate insurance related to your operations and this purchase. PCF will determine whether this coverage is appropriate.

Please upload evidence of insurance.

**If your organization does not have evidence of insurance coverage, please provide an explanation as to why.**

Certificate of Insurance-Sept 2022.pdf

### **Insurance Requirement\***

**If you are awarded a contract from the ARPA Nonprofit Capital Project Fund, you will be required to list Pinellas Community Foundation as an additional insured through your general liability insurance or other appropriate coverages for the duration of the contract. If you would like to check with your insurance carrier on how to do this, here is the information about PCF you will need:**

Pinellas Community Foundation  
17755 US Highway 19 N  
Suite 150  
Clearwater, FL 33764  
727-531-0058

**Please check the box below to indicate that you understand and will be able to comply with this requirement if you are awarded a contract.**

**PCF will not ask for a certificate naming us as additional insured until the contracting stage.**

Yes, I understand and will comply with this requirement if awarded a contract.

## *Post-Grant Requirements*

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### **Reporting Requirements Acknowledgment\***

Grantees will be required to submit a pre-award agreement within two weeks of receiving an award notice. In addition, grantees will be required to submit a report within 30 days after the purchase is completed.

Financial information justifying all expenditures will also need to be provided. This includes but is not limited to:

- Invoices
- Canceled checks
- Credit card statements, along with a record of paying the credit card.

If you have any questions, please contact Rose Cervantes, ARPA Program Officer at rcervantes@pinellascf.org. Yes, I agree to submit this grant agreement and impact report within the specified timeframes.

## *Additional Information*

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### Budget Summary

**NO LONGER USED, REPLACED IN APP WITH UPLOAD FIELD INCLUDED**

**Please use THIS TEMPLATE to indicate costs and any cash match your organization may have for the proposed purchases.**

Please note that indirect costs are not permitted for small purchases.

If you have additional notes to add to your budget summary, you may do so in the text box below.

### Additional Upload

If you have something to share, you can upload it here in PDF format.

UWS Pinellas Impact.pdf

### Anything else to share?

Is there anything else that you would like Pinellas Community Foundation to know or other information your organization would like to share that isn't addressed elsewhere in this application?

*[Unanswered]*

### Brief Project Descriptor

Please briefly describe this organization's request.



## File Attachment Summary

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### *Applicant File Uploads*

- United Way Suncoast ARPA Capital Bids.pdf
- United Way Suncoast Budget-Small-Capital-Purchases.xlsx
- United Way Suncoast Summary Budget FY 2023.pdf
- All Boards Reporting Roster 6.7.22.pdf
- 06\_30\_2021 IRS 990 UW Suncoast\_Public Disclosure.pdf
- 06\_30\_2021\_Audited Financials\_UW Suncoast.pdf
- Certificate of Insurance-Sept 2022.pdf
- UWS Pinellas Impact.pdf

United Way Suncoast  
ARPA Nonprofit Capital Project Fund - Small Purchases  
September 2022  
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9. Tablet .....	12
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Appendix	14

## Neighborhood Resource Center

### 1. Laptop with Warranty

Bid#1 (Preferred Choice)- HP ENVY x360 Convert 15.6", touch screen, Windows 11 Home, Intel® Core™ i5, 8GB RAM, 256GB SSD, FHD

HOME / HP ENVY X360 CONVERT 15.6", TOUCH SCREEN, WINDOWS 11 HOME, INTEL® CORE™ I5, 8GB RAM, 256GB SSD, FHD



19

**SPECIAL OFFERS**  
Save 5% on select accessories with PC purchase | Save 10% on select monitors with PC purchase | Labor Day Sale  
[LEARN MORE](#)

★★★★★ 0/5 ENERGY STAR | NEW | HOME

**HP ENVY x360 Convert 15.6", touch screen, Windows 11 Home, Intel® Core™ i5, 8GB RAM, 256GB SSD, FHD**

SCREEN SIZE 15.6"  
COLOR Natural silver aluminum

- Windows 11 Home
- 12th Generation Intel® Core™ i5 processor
- Intel® Iris® X\* Graphics
- 8 GB memory; 256 GB SSD storage
- 15.6" diagonal FHD touch display [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

1,200.00 ~~SAVE \$230.00~~  
**\$1,002.49**

[ADD TO CART](#)


**PROTECT YOUR DEVICE WITH AN HP CARE PACK**  
[LEARN MORE](#)

<input type="radio"/> 1-Year Standard Warranty	Included
<input type="radio"/> HP 2 Year w/Accidental Care	<del>266.00</del> \$192.74
<input checked="" type="radio"/> HP 3 Year Accidental Damage Protection w/Pickup And Return Service For Consumer Notebook	<b>HP RECOMMENDS</b> <del>226.00</del> \$202.50

**IN STOCK** Ships in 1 business day

Bid #2-HP ENVY x360 Convert 15.6", touch screen, Windows 11 Home, Intel® Core™ i5, 8GB RAM, 256GB SSD, FHD plus Warranty

HOME / LAPTOPS / CREATORS / HP ENVY X360 / HP ENVY X360 2-IN-1 - LAPTOP 15Z-EY000



18

**SPECIAL OFFERS**  
FREE Storewide Shipping | Save 5% on select accessories with PC purchase | Save 10% on select monitors with PC purchase  
[LEARN MORE](#)

★★★★★ 4.5/5 (4) ENERGY STAR | HOME

**HP ENVY x360 2-in-1 - Laptop 15z-ey000**

**CUSTOMIZABLE**

SCREEN SIZE 15.6"

- Windows 11 Home
- AMD Ryzen™ 5 5625U (up to 4.3 GHz, 16 MB L3 cache, 6 cores, 12 threads) + AMD Radeon™ Graphics
- 8 GB DDR4-3200 SDRAM (2 X 4 GB)
- 256 GB PCIe® NVMe™ M.2 SSD [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

Starting at ~~839.00~~ **SAVE \$225.00**  
**\$614.99**

[ADD TO CART](#) [CUSTOMIZE & BUY](#)

**PayPal CREDIT** Pay over 12 months at 0% APR. Min purchase required.

ADD TO COMPARE Product # 54L3TAV\_3



# HP Care Pack

### SPECIAL OFFERS

Risk Free | Save \$61 Instantly

[LEARN MORE](#)

★★★★☆ 4.2/5 (145)

## HP 3 year w/Accidental Damage

DIGITAL

- Get 100% money back (excluding tax)
- Accidental damage protection
- Hardware Repair Coverage
- Coverage begins day of PC purchase
- No extra fees for repairs

~~246.00~~ SAVE \$61.75

**\$185.24**

[Earn 1X HP Rewards Points](#)

[ADD TO CART](#)


HP Care Packs are delivered electronically [SEE DETAILS](#)

Product # U9Y59E

## 2. Desktop Computers

### Bid #1 (Preferred Choice)- HP ProDesk 600 G6 Desktop Mini PC

HOME / BUSINESS / HP PRO DESKTOPS / HP PRODESK 600 MINI / HP PRODESK 600 G6 DESKTOP MINI PC



★★★★☆ 4.2/5 (20)

**HP ProDesk 600 G6 Desktop Mini PC** BUSINESS

- Windows 10 Pro
- Intel® Core™ i5-10500 (3.1 GHz base frequency, up to 4.5 GHz with Intel® Turbo Boost Technology, 12 MB L3 cache, 6 cores)
- 16 GB memory, 256 GB SSD storage
- Intel® UHD Graphics 630 [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

LISTEN ~~SAVE \$873.00~~  
**\$716.00** [Earn 1X HP Rewards Points](#)

OUT OF STOCK

PROTECT YOUR DEVICE WITH AN HP CARE PACK [LEARN MORE](#)


<input checked="" type="radio"/> 3-Year Standard Warranty	Included
<input type="radio"/> HP 3 year Next Business Day Onsite w/Accidental Damage Protection Desktop HW Supp	<del>\$66.00</del> <b>\$33.75</b>
<input type="radio"/> HP 3 Year Operating System Restoration, Data Recovery, Software Support Onsite Warranty (6 calls Only)	<b>HP RECOMMENDS</b> <del>\$24.00</del> <b>\$44.25</b>

**CURRENTLY OUT OF STOCK** Ships in 1 business day

**SPECIAL OFFERS**  
 Save 5% on select accessories with PC purchase | Save 10% on select monitors with PC purchase | Labor Day Sale  
[LEARN MORE](#)

### Bid #2-HP ProDesk 600 G6 Desktop Mini PC

HOME / BUSINESS / HP THIN CLIENTS / HP T640 THIN CLIENT / HP T640 THIN CLIENT WI-FI



★★★★☆ 0/5

**HP t640 Thin Client Wi-Fi** ENERGY STAR

- Windows 10 IoT Enterprise for Thin Clients
- AMD Ryzen™ R1505G (2.4 GHz base clock, up to 3.3 GHz max boost clock, 4 MB L3 cache, 2 cores)
- 8 GB DDR4-2400 MHz RAM (2 x 4 GB) [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

**\$730.00** [Earn 1X HP Rewards Points](#)

[ADD TO CART](#)

PROTECT YOUR DEVICE WITH AN HP CARE PACK [LEARN MORE](#)

<input checked="" type="radio"/> 3-Year Standard Warranty	Included
<input type="radio"/> HP 3 year Next Business Day Response Advanced Exchange Thin Client Hardware Support	<b>HP RECOMMENDS</b> <del>\$88.00</del> <b>\$66.00</b>

**IN STOCK** Ships in 40 business days

[ADD TO COMPARE](#) Product # 426U7UT#ABA

**SPECIAL OFFERS**  
 Save 5% on select accessories with PC purchase | Save 10% on select monitors with PC purchase | Labor Day Sale  
[LEARN MORE](#)

### 3. Network Switch

#### Bid #1 (Preferred Choice)-Switch Enterprise 24 PoE – Ubiquiti Inc.

##### Switch Enterprise 24 PoE Sold Out

SKU: USW-Enterprise-24-PoE

[Summary](#) [Datasheet](#) [Installation Guide](#)

**Layer 3, PoE switch with (12) 2.5GbE, PoE+ RJ45 ports, (12) GbE, PoE+ RJ45 ports, and (2) 10G SFP+ ports.**

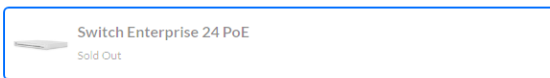
The Switch Enterprise 24 PoE (USW Enterprise 24 PoE) is a fully managed, Layer 3 switch with (12) 2.5GbE, PoE+ RJ45 ports, (12) GbE, PoE+ RJ45 ports, (2) 10G SFP+ ports, and a 400W total PoE supply. The USW Enterprise 24 PoE also features a 1.3" LCM color touchscreen that concisely displays key system and connection insights.

Additionally, the USW Enterprise 24 PoE offers enhanced power supply failure protection when connected to the SmartPower Redundant Power System ([USP RPS](#) sold separately). This switch can be monitored or configured from anywhere with the powerful, intuitive UniFi Network web application and mobile app.

##### Features:

- (1) 1.3" LCM color touchscreen with AR switch management
- (12) GbE, PoE+ RJ45 ports
- (12) 2.5GbE, PoE+ RJ45 ports
- (2) 10G SFP+ ports
- (1) USP RPS DC input
- 400W total PoE supply
- Layer 3 switching features
- Single-row RJ45 port layout for easy patch panel cable management

Managed with the UniFi Network application: **Version 5.14.12 and later**



**\$799** Sold Out

To subscribe to back in stock e-mails [Log in](#)

[Show Recommended Alternatives](#)

Free and easy return. [Read more](#)



##### Works with the UniFi Network Application



- Centrally manage multiple networks from an intuitive interface
- Enjoy real-time device insights and deep configuration options
- Upgrade device firmware remotely
- Manage network users and guests with ease
- Personalize the design, architecture, and privacy of guest hotspots
- Set up devices quickly and manage them on the go with a powerful mobile app

[And much more](#) →

#### Bid #2-Ubiquiti Switch Enterprise 24 PoE | 24-Port Managed Layer 3 Multi-Gigabit PoE Switch (USW-Enterprise-24-PoE)



Roll over image to zoom in



## Ubiquiti Switch Enterprise 24 PoE | 24-Port Managed Layer 3 Multi-Gigabit PoE Switch (USW-Enterprise-24-PoE)

Brand: Ubiquiti Networks  
★★★★★ 5 ratings

\$838<sup>41</sup>

Pay \$46.58/month for 18 months, interest-free upon approval for the Amazon Rewards Visa Card

### Product details

Brand	Ubiquiti Networks
Mounting Type	Panel Mount
Unit Count	1 Count
Number of Items	1

- Layer 3, PoE switch with (12) 2.5GbE, 802.3at PoE+ RJ45 ports, (12) GbE, 802.3at PoE+ RJ45 ports, and (2) 10G SFP+ ports
- (1) 1.3" LCM color touchscreen with AR switch management
- (12) GbE, 802.3at PoE+ RJ45 ports
- (12) 2.5GbE, 802.3at PoE+ RJ45 ports
- (2) 10G SFP+ ports
- (1) USP RPS DC input
- 400W total PoE supply
- Layer 3 switching features
- Single-row RJ45 port layout for easy patch panel cable management

\$838<sup>41</sup>

\$40.59 delivery **September 13 - 15**. Details

Select delivery location

**In stock.**

Usually ships within 2 to 3 days.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from Deal Targets  
Sold by Deal Targets

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

**Add a Protection Plan:**

- 3-Year Protection for \$80.99
- 4-Year Protection for \$105.99

Add to List

#### 4. Firewall

### Bid#1 (Preferred Choice)-SonicWall TZ470 Secure Upgrade Plus 2YR Advanced Edition (02-SSC-6798)



Roll over image to zoom in



#### SonicWall TZ470 Secure Upgrade Plus 2YR Advanced Edition (02-SSC-6798)

Visit the Sonicwall Store  
 ★★★★★ 2 ratings | 5 answered questions

\$1,706<sup>76</sup>

Thank you for being a Prime member. Get a \$100 Gift Card: Pay \$1,606.76 upon approval for the Amazon Prime Rewards Visa Card.

Not eligible for Amazon Prime. Available with free Prime shipping from other sellers on Amazon.

Size: **2YR Advanced Edition**

\$1,605.78
  **\$1,706.76**
 \$2,437.38

#### Product details

Brand	Sonicwall
Connectivity Technology	USB, Ethernet
Item Weight	0.83 Kilograms
Control Method	App
Item Dimensions LxWxH	5.31 x 7.48 x 1.38 inches

- The latest SonicWall TZ470 series, are the first desktop form factor nextgeneration firewalls (NGFW) with 10 or 5 Gigabit Ethernet interfaces. The series consist of a wide range of products to suit a variety of use cases.
- Reduce complexity and get the business running without relying on IT personnel with easy onboarding using SonicExpress App and Zero-Touch Deployment, and easy management through a single pane of glass
- Drive business growth by investing in next-gen appliances with multi-gigabit and advanced security features, to future-proof against the changing network and security landscape
- SonicWall Advanced Gateway Security Suite keeps your network safe from zero-day attacks, viruses, intrusions, botnets, spyware, Trojans, worms and other malicious attacks. Examine suspicious files at the gateway in a cloud-based multi-layered sandbox for inspection to keep your network safe from unknown threats. As soon as new threats are identified and often before

\$1,706<sup>76</sup>

FREE delivery **September 13 - 16.** Details

Or fastest delivery **September 12 - 15.** Details

Deliver to Daniel - Safety Harbor 34695

**In stock.**  
Usually ships within 2 to 3 days.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from SerenIT  
 Sold by SerenIT  
 Customer Service SerenIT

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

#### Add a Protection Plan:

- 4-Year Protection for \$167.99
- 3-Year Protection for \$133.99
- Multiple Device Monthly Protection (Renews Monthly Until Cancelled) for \$16.99/month

Add to List

### Bid #2-SonicWall TZ470 Secure Upgrade Plus 3YR Essential Edition (02-SSC-6797)



Roll over image to zoom in



#### SonicWall TZ470 Secure Upgrade Plus 3YR Essential Edition (02-SSC-6797)

Visit the Sonicwall Store  
 ★★★★★ 10 ratings

\$2,036<sup>43</sup>

Pay \$169.70/month for 12 months (plus S&H, tax) with 0% interest equal monthly payments when you're approved for the Prime Store Card.

Not eligible for Amazon Prime. Available with free Prime shipping from other sellers on Amazon.

Size: **3YR Essential Edition**

\$1,223.60
  **\$1,511.73**
 \$2,036.43

#### Product details

Brand	Sonicwall
Connectivity Technology	USB, Ethernet
Item Weight	0.83 Kilograms
Number of Ports	10
Control Method	App
Data Transfer Rate	2 Gigabits Per Second

- The latest SonicWall TZ470 series, are the first desktop form factor nextgeneration firewalls (NGFW) with 10 or 5 Gigabit Ethernet interfaces. The series consist of a wide range of products to suit a variety of use cases.
- Reduce complexity and get the business running without relying on IT personnel with easy onboarding using SonicExpress App and Zero-Touch Deployment, and easy management through a single pane of glass
- Drive business growth by investing in next-gen appliances with multi-gigabit and advanced security features, to future-proof against the changing network and security landscape
- Essential Protection Service Suite: includes Capture Advanced Threat Protection, Gateway Anti-Virus, Anti-Spyware, Intrusion Prevention, Application Firewall Service, Content Filtering Premium Services, Anti-Spam and 24x7 Support with firmware.

Buy new:

\$2,036<sup>43</sup>

FREE delivery **September 13 - 16.** Details

Or fastest delivery **September 12 - 15.** Details

Deliver to Daniel - Safety Harbor 34695

**In stock.**  
Usually ships within 2 to 3 days.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from SerenIT  
 Sold by SerenIT  
 Customer Service SerenIT

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

#### Add a Protection Plan:

- 4-Year Protection for \$184.99
- 3-Year Protection for \$147.99
- Multiple Device Monthly Protection (Renews Monthly Until Cancelled) for \$16.99/month



## 5. Wireless Access Point

### Bid#1 (Preferred Choice)- UniFi6 Enterprise – Ubiquiti Inc.

# UniFi6 Enterprise Sold Out

SKU: U6-Enterprise-US

[Summary](#) [Datasheet](#) [Installation Guide](#)


Powerful, ceiling-mounted WiFi 6E access point designed for seamless multi-band coverage in high-density networks.

#### Features:

- WiFi 6 support (2.4/5/6 GHz bands)
- 10.2 Gbps aggregate throughput rate
- (1) 2.5GbE RJ45 port (PoE In)
- Powered with PoE+

**Note:** 6 GHz operation is supported in [these countries](#).

Managed with the UniFi Network application: **Version 7.1.66 and later (US)/ 7.2.91 and later (Elsewhere)**

 **UniFi6 Enterprise**  
Sold Out

**\$299** Sold Out

To subscribe to back in stock e-mails [Login](#)



#### Adopt the U6-Enterprise in Minutes with Your UniFi Network Application and:

- Centrally manage multiple networks from an intuitive interface
- Enjoy real-time device insights and deep configuration options
- Upgrade device firmware remotely

### Bid #2-Ubiquiti UniFi 6 Pro Access Point | US Model | PoE Adapter not Included (U6-Pro-US)

Electronics > Computers & Accessories > Networking Products > Wireless Access Points



Click image to open expanded view



#### Ubiquiti UniFi 6 Pro Access Point | US Model | PoE Adapter not Included (U6-Pro-US)

Brand: Ubiquiti Networks

★★★★★ 56 ratings | 19 answered questions

**Amazon's Choice** for "unifi access point"

**\$208<sup>99</sup>**

**Pay \$34.83/month for 6 months, interest-free upon approval for the Amazon Prime Rewards Visa Card**

Not eligible for Amazon Prime. Available with free Prime shipping from other sellers on Amazon.

- Indoor, dual-band WiFi 6 access point that can support over 300 clients with its 5.3 Gbps aggregate throughput rate.
- Dual-band WiFi 6 (802.11ax)
- 5 GHz (4x4 MU-MIMO) band with a 4.8 Gbps throughput rate
- 2.4 GHz (2x2 MIMO) band with a 573.5 Mbps throughput rate
- Operates at full 4x4 MIMO with 160 MHz bandwidth
- 300+ concurrent client capacity
- Guest Traffic Isolation, which enhances wireless network security and lowers traffic congestion

✓ Show more

[Report incorrect product information.](#)

**\$208<sup>99</sup>**

FREE delivery **September 14 - 16**. Details

Or fastest delivery **Tuesday, September 13**. Order within 1 hr 21 mins. Details

Deliver to Daniel - Safety Harbor 34695

**In Stock.**

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from Lucky Store 4 You  
Sold by Lucky Store 4 You  
Customer Service: Lucky Store 4 You

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

**Add a Protection Plan:**

4-Year Protection for **\$44.99**

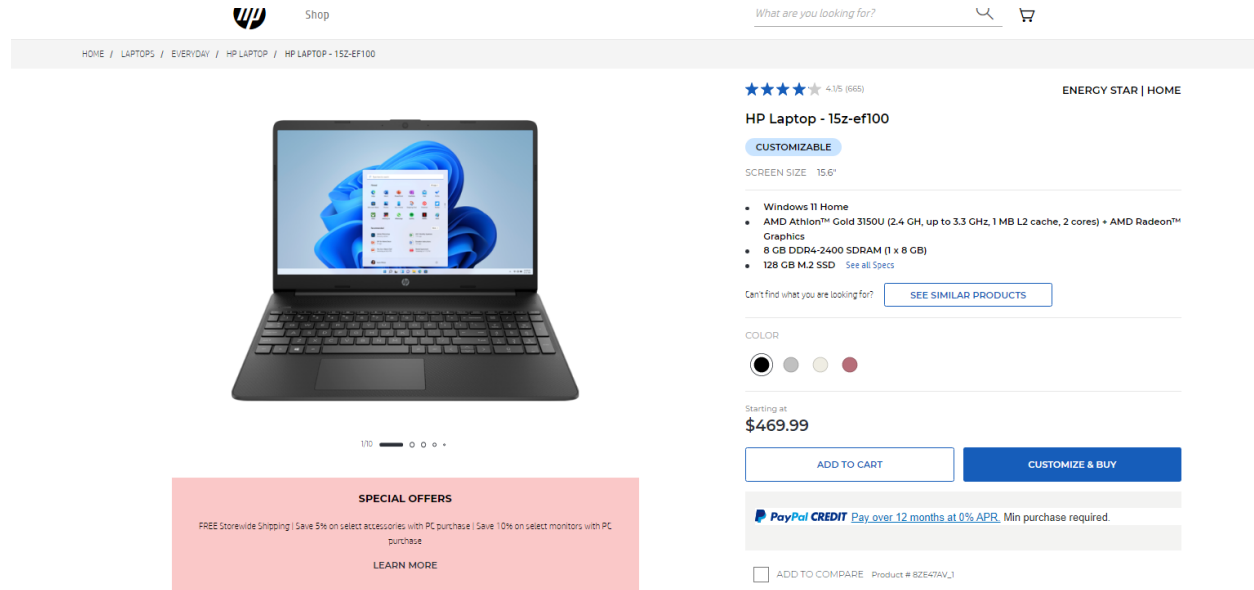
3-Year Protection for **\$33.99**

Add to List

# VITA Program

## 6. Laptops-VITA program

### Bid#1 (Preferred Choice)-HP Laptop - 15z-ef100



Shop

What are you looking for?

HOME / LAPTOPS / EVERYDAY / HP LAPTOP / HP LAPTOP - 15Z-EF100

ENERGY STAR | HOME

★★★★☆ 4.1/5 (666)

**HP Laptop - 15z-ef100**

CUSTOMIZABLE

SCREEN SIZE 15.6"

- Windows 11 Home
- AMD Athlon™ Gold 3150U (2.4 GHz, up to 3.3 GHz, 1 MB L2 cache, 2 cores) + AMD Radeon™ Graphics
- 8 GB DDR4-2400 SDRAM (1 x 8 GB)
- 128 GB M.2 SSD [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

COLOR

Starting at **\$469.99**

[ADD TO CART](#) [CUSTOMIZE & BUY](#)

**PayPal CREDIT** [Pay over 12 months at 0% APR.](#) Min purchase required.

ADD TO COMPARE Product # 8ZE47AV\_1


**SPECIAL OFFERS**

FREE Storewide Shipping | Save 5% on select accessories with PC purchase | Save 10% on select monitors with PC purchase

[LEARN MORE](#)

### Bid #2-2021 Newest HP 15z-ef100 15.6" HD Laptop w/ WLED Backlit Display (AMD Ryzen 3 3250U 2-Core, 8GB RAM, 256GB SSD, AMD Radeon, 1366x768, WiFi, Bluetooth, Webcam, W11H) w/Hub

Electronics > Computers & Accessories > Computers & Tablets > Laptops > Traditional Laptops



2021 Newest HP 15z-ef100 15.6" HD Laptop w/ WLED Backlit Display (AMD Ryzen 3 3250U 2-Core, 8GB RAM, 256GB SSD, AMD Radeon, 1366x768, WiFi, Bluetooth, Webcam, W11H) w/Hub

Visit the HP Store

★★★★☆ 4 ratings

**\$439<sup>00</sup>**

**prime**

Pay \$36.58/month for 12 months, interest-free upon approval for the Amazon Prime Rewards Visa Card

Capacity: 8GB RAM|256GB SSD|Win11H

<b>8GB RAM 256GB SSD Win11H</b>	8GB RAM 256GB SSD Win11Pro
8GB RAM 512GB SSD Win11H	8GB RAM 512GB SSD Win11Pro
16GB RAM 1TB SSD Win11H	16GB RAM 1TB SSD Win11Pro
16GB RAM 256GB SSD Win11H	16GB RAM 256GB SSD Win11Pro
16GB RAM 512GB SSD Win11H	16GB RAM 512GB SSD Win11Pro
32GB RAM 512GB SSD Win11H	32GB RAM 512GB SSD Win11Pro

Brand HP

Series 15z-ef100

Screen Size 15.6 Inches

Hard Disk Size 256 GB

CPU Model AMD R Series

Ram Memory 8 GB

Installed Size

[See more](#)

**About this item**

**\$439<sup>00</sup>**

**prime**

FREE delivery Saturday, September 10. Order within 1 hr 18 mins. Details

Deliver to Daniel - Safety Harbor 34695

**Only 17 left in stock - order soon.**

Qty: 1

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[Buy Now](#)

Secure transaction

Ships from GreatPriceTech...  
Sold by GreatPriceTech...  
Customer Service Amazon.com

Details

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

**Add a Protection Plan:**

- 4-Year Protection for **\$99.99**
- 2-Year Protection for **\$61.99**
- Multiple Device Monthly Protection (Renews Monthly Until Cancelled) for **\$16.99/month**

**Add an Accessory:**

- Microsoft 365 Family 13 Months Free, Plus 12-Mo... **\$89.99**
- Microsoft 365 Personal 1 **\$69.99**

## 7. Printers

### Bid#1 (Preferred Choice)- HP LaserJet Pro 3001dwe Wireless Printer with HP+

HOME / BUSINESS / PRINTERS / HP LASERJET PRO PRINTER / HP LASERJET PRO 3001DWE WIRELESS PRINTER WITH HP+

★★★★☆ 3.8/5 (4) ENERGY STAR | NEW | SMALL MEDIUM BUSINESS

#### HP LaserJet Pro 3001dwe Wireless Printer with HP+

FUNCTIONS Print

- Print, wireless and auto 2-sided printing
- Fast speeds for professional quality black & white prints
- HP Wolf Pro security settings
- Eligible for money-saving HP Instant Ink [See all Specs](#)

Can't find what you are looking for? [SEE SIMILAR PRODUCTS](#)

**\$239.00** [Earn 1X HP Rewards Points](#)

**ADD TO CART**

**IN STOCK** Ships in 1 business day

ADD TO COMPARE Product # 3G650E#BG3

### Bid#2-HP LaserJet Pro 3001dwe Wireless Black & White Printer with HP+ Smart Office Features

Office Products > Office Electronics > Printers & Accessories > Printers > Laser Printers

HP LaserJet Pro 3001dwe Wireless Black & White Printer with HP+ Smart Office Features

Visit the HP Store  
★★★★☆ 1,113 ratings | 137 answered questions  
**Amazon's Choice** for "hp+laserjet+pro+3001dwe+wireless+printer+with+..."

**\$239.00**  
**prime** & FREE Returns

Pay \$39.83/month for 6 months, interest-free upon approval for the Amazon Prime Rewards Visa Card

Style: **New Version: HP+, LaserJet Pro 3001dwe**

<b>New Version: HP+, LaserJet Pro 3001dwe</b> \$239.00 <b>prime</b>	<b>New Version: LaserJet Pro 3001dw</b> \$239.00 <b>prime</b>
<b>Old Version: M203dw</b> \$209.00 <b>prime</b>	

**Brand** HP  
**Connectivity Technology** Wi-Fi, USB, Ethernet  
**Printing Technology** Laser  
**Color** White  
**Model Name** New Version: HP+, LaserJet Pro 3001dwe  
[See more](#)

**About this item**

- **BEST FOR SMALL TEAMS** – Print professional-quality black & white documents and reports with auto 2-sided printing. Easy to set up and manage in the office or remotely. Ideal for up to 7 users.

**\$239.00**  
**prime** & FREE Returns

**FREE delivery Friday, September 9.** Order within 9 hrs 14 mins

**Deliver to Daniel - Safety Harbor 34695**

**In Stock.**  
Qty: 1

**Add to Cart**  
**Buy Now**

**Secure transaction**  
Ships from Amazon.com  
Sold by Amazon.com  
Customer Service Amazon.com  
Packaging Shows what's in...

**Details**  
Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt  
Support: Free Amazon product support included

**Add a Protection Plan:**  
 4-Year Protection for \$44.99  
 3-Year Protection for \$33.99


**Add an Accessory:**  
 HP Instant Ink \$5 Prepaid Code - The Smart Ink a... \$5.00  
 Original HP 148A Black Laserjet Toner Cartridge... \$108.32  
 Original HP 148X Black Laserjet Toner Cartridge... \$215.99


Roll over image to zoom in

## 8. Scanners

### Bid#1 (Preferred Choice)- HP ScanJet Pro 2000 s2 Sheet-feed Scanner

HOME / BUSINESS / PRINTERS / HP SCANJET / HP SCANJET PRO 2000 S2 SHEET-FEED SCANNER



17 

**SPECIAL OFFERS**  
FREE Storewide Shipping | Labor Day Sale  
[LEARN MORE](#)

★★★★☆ 3.6/5 (9) ENERGY STAR | BUSINESS | HOME AND HOME OFFICE

**HP ScanJet Pro 2000 s2 Sheet-feed Scanner**

- Scans up to 35 ppm / 70 IPM
- Scan to text, PDF and more with built in OCR
- Includes 50 page ADF and HP Instant on scanning
- Small and slim desktop design [See all Specs](#)

**\$369.00** [Earn 1X HP Rewards Points](#)

**ADD TO CART**

**PROTECT YOUR DEVICE WITH AN HP CARE PACK**  
[LEARN MORE](#)

<input checked="" type="radio"/> 1-Year Standard Warranty	Included
<input type="radio"/> HP 3 year Exchange Hardware Support for ScanJet Pro 2xxx	\$80.00
<input type="radio"/> HP 3 year Next Business Onsite Exchange Hardware Support for ScanJet Pro 2xxx	<b>HP RECOMMENDS</b> \$91.00

**IN STOCK** Ships in 1 business day

[ADD TO COMPARE](#) Product # 6FW06A4BGJ

### Bid #2-HP Scanjet Pro 2000 s2 Sheet-Feed Scanner (6FW06A)




Roll over image to zoom in

**HP Scanjet Pro 2000 s2 Sheet-Feed Scanner (6FW06A)**

Visit the HP Store  
★★★★☆ 82 ratings | 13 answered questions  
**Amazon's Choice** for "hp scanjet pro 2000 s2 sheet-feed scanner"  
Climate Pledge Friendly

**\$369<sup>00</sup>**  
✓ **prime** One-Day & FREE Returns  
Pay **\$30.75/month for 12 months, interest-free upon approval for the Amazon Prime Rewards Visa Card**

May be available at a lower price from other sellers, potentially without free Prime shipping.

**Product details**

<b>Media Type</b>	Laser Paper, Pre-punched Paper, Cut Sheet Paper, Cheques, Business Card
<b>Scanner Type</b>	Document, Business Card
<b>Brand</b>	HP
<b>Model Name</b>	6FW06A#BGJ
<b>Connectivity Technology</b>	USB
<b>Item Dimensions LxWxH</b>	16.2 x 12.2 x 11.8 inches

- Produce scans at up to 35 ppm/70 ipm with two-sided scanning that captures both sides at once
- Free up space for work: this HP ScanJet Pro is small and slim—a modern design perfect for the desktop
- Load up to 50 pages into the automatic document feeder for fast, unattended scanning
- Scan images directly into applications with included and full-featured TWAIN and ISIS
- Easily transfer scans into editable text, searchable PDF files, and more file types, using built-in OCR
- Connectivity Technology: Usb
- Paper Size: 2 X 3 To 8.5 X 122

[See more product details](#)

**Buy new:**  
**\$369<sup>00</sup>**  
✓ **prime** One-Day & FREE Returns  
FREE delivery **Tomorrow, September 8.** Order within 3 hrs 28 mins  
Deliver to Daniel - Safety Harbor 34695  
**In Stock.**  
Qty: 1  
**Add to Cart**  
**Buy Now**

**Secure transaction**  
Ships from Amazon.com  
Sold by Amazon.com  
Customer Service Amazon.com  
Packaging Shows wha...  
Details  
Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt  
Support: Free Amazon product support included  
**Add a Protection Plan:**  
 4-Year Protection for \$44.99  
 3-Year Protection for \$33.99  
 Multiple Device Monthly Protection (Renews Monthly Until Cancelled) for \$16.99/month

## 9. Tablets

### Bid#1 (Preferred Choice)- Fire HD 8 tablet, 8" HD display, 32 GB, latest model (2020 release)

### Bid #2-All-new Fire 7 tablet, 7" display, 16 GB, 30% faster processor

## 9. Toner

### Bid#1 (Preferred Choice)- Original HP 138A Black Laserjet Toner Cartridge



Roll over image to zoom in



#### Original HP 138A Black Laserjet Toner Cartridge | This Cartridge Works with: HP Laserjet Pro 3001dwe, 3001dw and HP Laserjet Pro MFP 3101 fdwe, 3101fdw | W1380A

Visit the HP Store

★★★★☆ 1 rating

Price: **\$59.99** ✓prime One-Day & FREE Returns

Pay **\$10.00/month for 6 months**, interest-free upon approval for the Amazon Prime Rewards Visa Card

May be available at a lower price from other sellers, potentially without free Prime shipping.

- Count on high-quality, reliable printing and save time by avoiding common printing problems: Original HP Toner provides the printing experience crucial for office productivity
- This cartridge works with: HP LaserJet Pro 3001dwe, 3001dw and HP LaserJet Pro MFP 3101 fdwe, MFP 3101fdw
- Cartridge yield (approx.): 2,900 pages
- Use Original HP Toner Cartridges to eliminate toner leaks and premature failures
- Buy sustainable—100% of Original HP Toner Cartridges contain recycled content
- Help protect your printer from malicious code and maintain the integrity of your data with Original HP's tamper-resistant chips, firmware and packaging
- Original HP Toner is committed to office air quality—HP voluntarily designs and tests its printing systems to meet eco-label emissions guidelines
- What's in the box: 1 new Original HP 138A Black LaserJet Toner Cartridge (W1380A)

[Report incorrect product information.](#)

#### One-time purchase:

\$59.99

✓prime One-Day

& FREE Returns

FREE delivery **Tomorrow, September 8.** Order within 5 hrs 8 mins

Deliver to Daniel - Safety Harbor 34695

In Stock.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from Amazon.com  
Sold by Amazon.com  
Customer Service Amazon.com  
Packaging Shows wha...

Details

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

Add a gift receipt for easy returns

#### Subscribe & Save:

\$59.99

### Bid #2- Original HP 138X Black Laserjet Toner Cartridge

Office Products > Office Electronics > Printers & Accessories > Printer Parts & Accessories > Printer Ink & Toner > Toner Cartridges



Roll over image to zoom in



#### Original HP 138X Black Laserjet Toner Cartridge - This cartridge works with: HP LaserJet Pro 3001, MFP 3101

Visit the HP Store

Price: **\$113.99** ✓prime One-Day & FREE Returns

Pay **\$19.00/month for 6 months**, interest-free upon approval for the Amazon Prime Rewards Visa Card

May be available at a lower price from other sellers, potentially without free Prime shipping.

- Count on high-quality, reliable printing and save time by avoiding common printing problems: Original HP Toner provides the printing experience crucial for office productivity
- This cartridge works with: HP LaserJet Pro 3001dwe, 3001dw and HP LaserJet Pro MFP 3101 fdwe, MFP 3101fdw
- Cartridge yield (approx.): 9,500 pages
- Use Original HP Toner Cartridges to eliminate toner leaks and premature failures
- Buy sustainable—100% of Original HP Toner Cartridges contain recycled content
- Help protect your printer from malicious code and maintain the integrity of your data with Original HP's tamper-resistant chips, firmware and packaging
- Original HP Toner is committed to office air quality—HP voluntarily designs and tests its printing systems to meet eco-label emissions guidelines
- What's in the box: 1 new Original HP 138X Black LaserJet Toner Cartridge (W1380X)

[Report incorrect product information.](#)

#### One-time purchase:

\$113.99

✓prime One-Day

& FREE Returns

FREE delivery **Tomorrow, September 8.** Order within 5 hrs 38 mins

Deliver to Daniel - Safety Harbor 34695

In Stock.

Qty: 1

Add to Cart

Buy Now

Secure transaction

Ships from Amazon.com  
Sold by Amazon.com  
Customer Service Amazon.com  
Packaging Shows wha...

Details

Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt

Add a gift receipt for easy returns


#### Subscribe & Save:

\$113.99

✓prime

First delivery on Sep 8

Ships from: Amazon.com  
Sold by: Amazon.com



Original HP 410A Cyan, Magenta, Yellow Toner Cartridges (3-pack) | Works with HP Color LaserJet Pro M452 Series...

★★★★☆ 1,037 | \$343.89 ✓prime

[Shop now >](#)

Amazon

Appendix

Laptop (Resource Centers)	<a href="#">HP ENVY x360 Convert 15.6", touch screen, Windows 11 Home, Intel® Core™ i5, 8GB RAM, 256GB SSD, FHD</a>	<a href="#">HP ENVY x360 Convert 15.6", touch screen, Windows 11 Home, Intel® Core™ i5, 8GB RAM, 256GB SSD, FHD</a>
Laptop Warranty	<a href="#">HP 2 year Pickup and Return Support w/Accidental Damage Protection Pavilion / Envy 13 14 15 NB</a>	<a href="#">HP® 3 year w/Accidental Damage (U9YS9E)</a>
Desktop	<a href="#">HP ProDesk 600 G6 Desktop Mini PC</a>	<a href="#">HP ProDesk 600 G6 Desktop Mini PC</a>
Switch	<a href="#">Switch Enterprise 24 PoE – Ubiquiti Inc.</a>	<a href="#">Amazon.com: Ubiquiti Switch Enterprise 24 PoE   24-Port Managed Layer 3 Multi-Gigabit PoE Switch (USW-Enterprise-24-PoE) : Electronics</a>
Firewall	<a href="#">Amazon.com: SonicWall TZ470 Secure Upgrade Plus 3YR Threat Edition (02-SSC-7263) : Electronics</a>	<a href="#">Amazon.com: SonicWall TZ470 Secure Upgrade Plus 3YR Essential Edition (02-SSC-6797) : Electronics</a>
Wireless Access Point	<a href="#">UniFi6 Enterprise – Ubiquiti Inc.</a>	<a href="#">Amazon.com: Ubiquiti UniFi 6 Pro Access Point   US Model   PoE Adapter not Included (U6-Pro-US) : Electronics</a>
Laptops (VITA)	<a href="#">HP Laptop - 15z-ef100</a>	<a href="#">Amazon.com: 2021 Newest HP 15z-ef100 15.6" HD Laptop w/ WLED Backlit Display (AMD Ryzen 3 3250U 2-Core, 8GB RAM, 256GB SSD, AMD Radeon, 1366x768, WiFi, Bluetooth, Webcam, W11H) w/Hub : Electronics</a>
Printer	<a href="#">HP LaserJet Pro 3001dwe Wireless Printer with HP+</a>	<a href="#">Amazon.com: HP LaserJet Pro 3001dwe Wireless Black &amp; White Printer with HP+ Smart Office Features : Electronics</a>
Scanner	<a href="#">HP ScanJet Pro 2000 s2 Sheet-feed Scanner</a>	<a href="#">Amazon.com: HP Scanjet Pro 2000 s2 Sheet-Feed Scanner (6FW06A) : Office Products</a>
Tablet	<a href="#">Amazon Official Site: Fire HD 8 Tablet, 8" Display, 2020 release</a>	<a href="#">Amazon Official Site: Fire 7 tablet, 7" Display, 2022 release</a>
Toner	<a href="https://www.amazon.com/Original-HP-Black-Laserjet-Cartridge/dp/B09Z4W4MVN/ref=sr_1_2?crid=10UPBNLM8U0YJ&amp;keywords=HP+138A&amp;qid=1662470693&amp;sprefix=hp+138a+%2Caps%2C164&amp;sr=8-2">https://www.amazon.com/Original-HP-Black-Laserjet-Cartridge/dp/B09Z4W4MVN/ref=sr_1_2?crid=10UPBNLM8U0YJ&amp;keywords=HP+138A&amp;qid=1662470693&amp;sprefix=hp+138a+%2Caps%2C164&amp;sr=8-2</a>	<a href="#">Amazon.com: Original HP 138X Black Laserjet Toner Cartridge - This cartridge works with: HP LaserJet Pro 3001, MFP 3101 : Office Products</a>





**FISCAL YEAR 2023 SUNCOAST BUDGET**

	PROGRAM SERVICES					SUPPORTING SERVICES			TOTAL
	Youth & Education	Placed Based Initiatives	Financial Stability	Community Support Services	Total Programs	Fundraising	Operations	Total Supporting Services	
<b>SOURCE OF FUNDS</b>									
<b>Public Revenue</b>									
Campaign contributions					-	15,420,742		15,420,742	15,420,742
Donor designations					-	(1,829,153)		(1,829,153)	(1,829,153)
Uncollectible provision					-	(1,143,221)		(1,143,221)	(1,143,221)
<b>NET PUBLIC REVENUE</b>	-	-	-	-	-	12,448,367		12,448,367	12,448,367
Grants and bequests	212,135	72,200	1,080,783		1,365,118		10,000	10,000	1,375,118
Service revenue					-	390,740	70,000	460,740	460,740
Investment, dividends, events				2,000	2,000	210,000	1,813,908	2,023,908	2,025,908
Net assets released	804,363		35,280		839,643			-	839,643
<b>TOTAL SOURCE OF FUNDS</b>	1,016,498	72,200	1,116,063	2,000	2,206,760	13,049,107	1,893,908	14,943,015	17,149,775
<b>USE OF FUNDS</b>									
<b>Direct Expenditures</b>									
Salary, benefits, taxes	953,530	481,460	497,493	804,057	2,736,540	1,724,320	1,213,772	2,938,092	5,674,632
Direct costs	1,442,025	704,545	1,198,978	262,333	3,607,880	237,165	512,050	749,215	4,357,094
Grants and allocations	3,734,753		2,186,081		5,920,834			-	5,920,834
<b>Total Direct Expenditures</b>	<b>6,130,307</b>	<b>1,186,005</b>	<b>3,882,552</b>	<b>1,066,390</b>	<b>12,265,254</b>	<b>1,961,485</b>	<b>1,725,822</b>	<b>3,687,307</b>	<b>15,952,561</b>
<b>Overhead Allocated</b>	323,050	149,935	184,392	232,163	889,540	533,727	547,688	1,081,415	1,970,955
<b>TOTAL EXPENDITURES</b>	6,453,357	1,335,939	4,066,944	1,298,553	13,154,794	2,495,212	2,273,510	4,768,721	17,923,515
<b>NET SOURCE/(USE) OF FUNDS</b>	<b>\$ (5,436,860)</b>	<b>\$ (1,263,739)</b>	<b>\$ (2,950,882)</b>	<b>\$ (1,296,553)</b>	<b>\$ (10,948,034)</b>	<b>\$ 10,553,895</b>	<b>\$ (379,601)</b>	<b>\$ 10,174,294</b>	<b>\$ (773,740)</b>

## 2022 Suncoast Board Roster

<b>Board Member</b>	
<p><b>Michael Attinella</b> Community Volunteer</p>	<p><b>Chad Loar</b> Regional President PNC</p>
<p><b>Lori Baggett</b> Associate General Counsel PODS Enterprises, LLC</p>	<p><b>Melva McKay Bass</b> <b>Hillsborough/Pinellas Area Board Representative</b> Chief Business Development Officer Suncoast Credit Union</p>
<p><b>Eric Bailey</b> Managing Principal CAPTRUST</p>	<p><b>Sara Nichols</b> CFO Appspace</p>
<p><b>James Camp</b> <b>Hillsborough/Pinellas Area Board Representative</b> Managing Director Raymond James</p>	<p><b>Rebecca Pickett</b> <b>Hillsborough/Pinellas Area Board Representative</b> Corporate Controller Better Choice Company</p>
<p><b>Kimberly Crum</b> Chief Human Resources Officer Pinellas County Government</p>	<p><b>David Pizzo, Vice Chair</b> Market President, West Florida Region Florida Blue</p>
<p><b>Scott Curtis</b> President, Private Client Group Raymond James Financial</p>	<p><b>Thais Rodriguez-Caez</b> Partner EY</p>
<p><b>Brian Deming, Chair</b> CEO Crucis</p>	<p><b>Stuart Rogel</b> President Graylan Ventures</p>
<p><b>Jacki Dezelski</b> <b>Manatee Area Board Representative</b> President/CEO Manatee Chamber of Commerce</p>	<p><b>Alex Sink</b> Community Volunteer</p>
<p><b>J.P. DuBuque</b> <b>Hillsborough/Pinellas Area Board Representative</b> President/CEO St. Petersburg Area EDC</p>	<p><b>Dr. R. Anthony Rolle</b> Professor and Dean College of Education USF</p>
<p><b>Jamie Egasti</b> Chairman Voyant Beauty</p>	<p><b>Sonja Rosario</b> SVP, Head of Client Experience Retail Business Banking Citibank</p>

<p><b>Estella Gray</b> Senior Regional Communications Lead Florida Blue</p>	<p><b>Mike Smith</b> Vice President, Business Banking Market Executive Fifth Third Bank</p>
<p><b>Kim Hopper</b> First Horizon Bank</p>	<p><b>Bob Thompson</b> <b>Manatee Area Board Representative</b> Community Volunteer</p>
<p><b>Rob Lane</b> <b>Sarasota/DeSoto Area Board Representative</b> Managing Shareholder Kerkering Barberio</p>	<p><b>Matthew Walker</b> <b>Young Leaders' Society Chair</b> Director Thomas Howell Ferguson CPAs</p>
<p><b>Traci Larsen, Treasurer</b> Florida Regional Credit Executive Regions Bank</p>	<p><b>Glenn Waters</b> BayCare Health System</p>

## 2022 Hillsborough/Pinellas Area Board Roster

<b>Board Member</b>	
<p><b>Robbie Artz</b> Director, Strategy and Development Tampa Bay Rays</p>	<p><b>Laura Hurd</b> Partner PricewaterhouseCoopers LLP</p>
<p><b>Melva McKay Bass, Vice Chair</b> Chief Business Development Officer Suncoast Credit Union</p>	<p><b>Sadaf Knight</b> CEO Florida Policy Institute</p>
<p><b>James Camp, Chair</b> Managing Director Raymond James</p>	<p><b>Matthew Liao-Troth</b> Vice President, Academic Affairs St. Petersburg College</p>
<p><b>Tammy Davis</b> Managing Director – Interim Resources Steven Douglas</p>	<p><b>Candy Olson</b> Child Advocate</p>
<p><b>Emily Diaz</b> VP, Program/Project Manager JPMorgan Chase</p>	<p><b>Rebecca Pickett</b> Corporate Controller Better Choice Company</p>
<p><b>J.P. DuBuque</b> President/CEO St. Pete Area EDC</p>	<p><b>Tabitha Roach</b> Vice President GTE Financial</p>
<p><b>Robin Gomez</b> City Manager City of Madeira Beach</p>	<p><b>Preston Scott</b></p>
<p><b>Annemarie Hare</b> Vice President – Wealth Strategist Northern Trust</p>	<p><b>Karl Strauch</b> VP of Marketing Port Tampa Bay</p>
<p><b>Carl Harness</b> Chief Human Services Administrator Hillsborough County</p>	

## 2022 Manatee Area Board Roster

<b>Board Member</b>
<b>Bruce Body</b> SVP Wealth Management Raymond James
<b>Susie Copeland</b> Community Volunteer
<b>Cheri Coryea, Chair</b> Principal Coryea Consulting LLC
<b>Jacki Dezelski, Vice Chair</b> President/CEO Manatee Chamber of Commerce
<b>Karen Droz</b> SVP, Senior Development Consultant Fifth Third Bank
<b>Michelle Grimsley</b> Lobbyist The Southern Group of Florida
<b>Barb Johnson</b> Community Volunteer
<b>Anisley Mena</b> Attorney Najmy Thompson
<b>Cynthia Saunders</b> Superintendent School District of Manatee County
<b>Debbie Tapp</b> Community Volunteer
<b>Bob Thompson</b> Community Volunteer

## 2022 Sarasota/DeSoto Area Board Roster

<b>Board Member</b>
<b>Dr. Brennan Asplen</b> Superintendent Sarasota County Schools
<b>Ashley Coone</b> CEO Ashley Coone Consulting
<b>Kimberly Hopper</b> SVP, Private Banking Group Manager First Horizon Bank
<b>Devaney Iglesias</b> External Affairs Manager Florida Power & Light Company
<b>Brad Johnson</b> Assistant County Administrator Sarasota County
<b>Heather Kasten</b> President/CEO Greater Sarasota Chamber of Commerce
<b>Nick Kouris</b> Local Market Leader, South West Florida Florida Blue
<b>Rob Lane</b> Managing Shareholder Kerkering Barberio
<b>Asena Mott</b> Campus Director South Florida State College
<b>Gerhard Toth, Chair</b> Business Banking Manager GTE Financial
<b>Steve Whitworth</b> Asst Program Lead Area Mgr Florida Power and Light

PUBLIC DISCLOSURE COPY

# TAX RETURN FILING INSTRUCTIONS

FORM 990

FOR THE YEAR ENDING

JUNE 30, 2021

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**PREPARED FOR:**

UNITED WAY SUNCOAST, INC.  
5201 W KENNEDY BLVD NO. 600  
TAMPA, FL 33609

---

**PREPARED BY:**

CBIZ MHM, LLC  
140 FOUNTAIN PKWY N, STE 410  
ST. PETERSBURG, FL 33716

---

**AMOUNT DUE OR REFUND:**

NOT APPLICABLE

---

**MAKE CHECK PAYABLE TO:**

NOT APPLICABLE

---

**MAIL TAX RETURN AND CHECK (IF APPLICABLE) TO:**

NOT APPLICABLE

---

**RETURN MUST BE MAILED ON OR BEFORE:**

NOT APPLICABLE

---

**SPECIAL INSTRUCTIONS:**

THIS COPY OF THE RETURN IS PROVIDED ONLY FOR PUBLIC DISCLOSURE PURPOSES. ANY CONFIDENTIAL INFORMATION REGARDING LARGE DONORS HAS BEEN REMOVED.

THIS RETURN HAS BEEN PREPARED FOR ELECTRONIC FILING. IF YOU WISH TO HAVE IT TRANSMITTED ELECTRONICALLY TO THE IRS, PLEASE SIGN, DATE, AND RETURN FORM 8879-EO TO OUR OFFICE. WE WILL THEN SUBMIT THE ELECTRONIC RETURN TO THE IRS. DO NOT MAIL A PAPER COPY OF THE RETURN TO THE IRS. RETURN FORM 8879-EO TO US BY MAY 16, 2022.

PLEASE NOTE THAT SHOULD YOU PROVIDE FORM 990 AND ITS ATTACHMENTS TO ANY THIRD PARTY, INCLUDING ANY STATE GOVERNMENT AGENCY, SCHEDULE B NAMES AND ADDRESSES SHOULD BE REDACTED.



Form **8879-EO**

# IRS e-file Signature Authorization for an Exempt Organization

OMB No. 1545-0047

For calendar year 2020, or fiscal year beginning JUL 1, 2020, and ending JUN 30, 2021

# 2020

Department of the Treasury  
Internal Revenue Service

▶ **Do not send to the IRS. Keep for your records.**  
▶ **Go to [www.irs.gov/Form8879EO](http://www.irs.gov/Form8879EO) for the latest information.**

Name of exempt organization or person subject to tax

Taxpayer identification number

**UNITED WAY SUNCOAST, INC.**

**59-3725701**

Name and title of officer or person subject to tax

**JESSICA MUROFF**  
**CEO**

## Part I Type of Return and Return Information (Whole Dollars Only)

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line **1a, 2a, 3a, 4a, 5a, 6a, or 7a** below, and the amount on that line for the return being filed with this form was blank, then leave line **1b, 2b, 3b, 4b, 5b, 6b, or 7b**, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return, then enter -0- on the applicable line below. **Do not** complete more than one line in Part I.

<b>1a</b> Form 990 check here ▶ <input checked="" type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990, Part VIII, column (A), line 12) .....	<b>1b</b> <u>40,544,184.</u>
<b>2a</b> Form 990-EZ check here ▶ <input type="checkbox"/>	<b>b</b> Total revenue, if any (Form 990-EZ, line 9) .....	<b>2b</b> _____
<b>3a</b> Form 1120-POL check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 1120-POL, line 22) .....	<b>3b</b> _____
<b>4a</b> Form 990-PF check here ▶ <input type="checkbox"/>	<b>b</b> Tax based on investment income (Form 990-PF, Part VI, line 5) .....	<b>4b</b> _____
<b>5a</b> Form 8868 check here ▶ <input type="checkbox"/>	<b>b</b> Balance due (Form 8868, line 3c) .....	<b>5b</b> _____
<b>6a</b> Form 990-T check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 990-T, Part III, line 4) .....	<b>6b</b> _____
<b>7a</b> Form 4720 check here ▶ <input type="checkbox"/>	<b>b</b> Total tax (Form 4720, Part III, line 1) .....	<b>7b</b> _____

## Part II Declaration and Signature Authorization of Officer or Person Subject to Tax

Under penalties of perjury, I declare that  I am an officer of the above organization or  I am a person subject to tax with respect to (name of organization) \_\_\_\_\_, (EIN) \_\_\_\_\_ and that I have examined a copy

of the 2020 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

**PIN: check one box only**

I authorize CBIZ MHM, LLC to enter my PIN 25701  
ERO firm name Enter five numbers, but do not enter all zeros

as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer or person subject to tax with respect to the organization, I will enter my PIN as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax ▶

Date ▶

## Part III Certification and Authentication

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN.

**50465100222**

Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature on the 2020 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of **Pub. 4163**, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature ▶ CBIZ MHM, LLC

Date ▶

**ERO Must Retain This Form - See Instructions**  
**Do Not Submit This Form to the IRS Unless Requested To Do So**

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2020)

Form **990**

**Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

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

**2020**

Department of the Treasury  
Internal Revenue Service

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

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

Open to Public Inspection

**A** For the 2020 calendar year, or tax year beginning **JUL 1, 2020** and ending **JUN 30, 2021**

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>UNITED WAY SUNCOAST, INC.</b> Doing business as Number and street (or P.O. box if mail is not delivered to street address) Room/suite <b>5201 W KENNEDY BLVD 600</b> City or town, state or province, country, and ZIP or foreign postal code <b>TAMPA, FL 33609</b> <b>F</b> Name and address of principal officer: <b>JESSICA MUROFF</b> <b>SAME AS C ABOVE</b>	<b>D</b> Employer identification number <b>59-3725701</b> <b>E</b> Telephone number <b>(813) 274-0900</b> <b>G</b> Gross receipts \$ <b>45,638,288.</b> <b>H(a)</b> Is this a group return for subordinates? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. See instructions <b>H(c)</b> Group exemption number ▶
<b>I</b> Tax-exempt status: <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
<b>J</b> Website: ▶ <b>WWW.UNITEDWAYSUNCOAST.ORG</b>		
<b>K</b> Form of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>L</b> Year of formation: <b>2001</b>
		<b>M</b> State of legal domicile: <b>FL</b>

**Part I Summary**

	<b>1</b>	Briefly describe the organization's mission or most significant activities: <b>TO PROVIDE LEADERSHIP THAT IMPROVES LIVES AND CREATES LASTING COMMUNITY CHANGE</b>		
	<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
<b>Activities &amp; Governance</b>	<b>3</b>	Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>24</b>
	<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>24</b>
	<b>5</b>	Total number of individuals employed in calendar year 2020 (Part V, line 2a)	<b>5</b>	<b>84</b>
	<b>6</b>	Total number of volunteers (estimate if necessary)	<b>6</b>	<b>3675</b>
	<b>7a</b>	Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
	<b>7b</b>	Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0.</b>
	<b>Revenue</b>	<b>8</b>	Contributions and grants (Part VIII, line 1h)	<b>Prior Year</b>
<b>9</b>		Program service revenue (Part VIII, line 2g)	<b>18,979,073.</b>	<b>38,846,249.</b>
<b>10</b>		Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>351,574.</b>	<b>217,475.</b>
<b>11</b>		Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>1,192,543.</b>	<b>1,480,251.</b>
<b>12</b>		Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>602.</b>	<b>209.</b>
<b>12</b>			<b>20,523,792.</b>	<b>40,544,184.</b>
<b>Expenses</b>	<b>13</b>	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>11,413,261.</b>	<b>10,831,400.</b>
	<b>14</b>	Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b>	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>5,531,730.</b>	<b>5,652,820.</b>
	<b>16a</b>	Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
	<b>b</b>	Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>2,116,454.</b>		
	<b>17</b>	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>2,945,506.</b>	<b>3,129,352.</b>
	<b>18</b>	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>19,890,497.</b>	<b>19,613,572.</b>
	<b>19</b>	Revenue less expenses. Subtract line 18 from line 12	<b>633,295.</b>	<b>20,930,612.</b>
<b>Net Assets or Fund Balances</b>	<b>20</b>	Total assets (Part X, line 16)	<b>Beginning of Current Year</b>	<b>End of Year</b>
	<b>21</b>	Total liabilities (Part X, line 26)	<b>44,526,386.</b>	<b>69,244,541.</b>
	<b>22</b>	Net assets or fund balances. Subtract line 21 from line 20	<b>9,747,774.</b>	<b>9,561,048.</b>
	<b>22</b>		<b>34,778,612.</b>	<b>59,683,493.</b>

**Part II Signature Block**

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

<b>Sign Here</b>	Signature of officer <b>JESSICA MUROFF, CEO</b> Type or print name and title	Date			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>PAUL DUNHAM</b>	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	PTIN <b>P00100222</b>
	Firm's name ▶ <b>CBIZ MHM, LLC</b>	Firm's EIN ▶ <b>27-3605969</b>			
	Firm's address ▶ <b>140 FOUNTAIN PKWY N, STE 410 ST. PETERSBURG, FL 33716</b>		Phone no. <b>727-572-1400</b>		

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

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: TO PROVIDE LEADERSHIP THAT IMPROVES LIVES AND CREATES LASTING COMMUNITY CHANGE BY MOBILIZING THE CARING PEOPLE OF OUR COMMUNITIES TO GIVE, ADVOCATE, AND VOLUNTEER. (CONTINUED ON SCHEDULE O)

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [X] 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 \$ 5,368,524. including grants of \$ 4,540,473. ) (Revenue \$ ) EARLY LEARNING: EARLY LEARNING IS CRITICALLY IMPORTANT TO ENSURING THAT CHILDREN ARE PREPARED FOR SCHOOL AND THAT THEY THRIVE IN THE EARLY YEARS OF THEIR EDUCATION, SETTING THE PATH FOR FUTURE SUCCESS. THE UNITED WAY SUNCOAST FOCUSES ON IMPROVING SCHOOL READINESS AND EARLY GRADE READING SKILLS FOR CHILDREN IN THE REGION. (CONTINUED ON SCHEDULE O)

4b (Code: ) (Expenses \$ 2,592,990. including grants of \$ 813,873. ) (Revenue \$ 80,974. ) SUPPORT SERVICES: A NETWORK OF SERVICES IS PROVIDED TO HELP INDIVIDUALS/FAMILIES MOVE PAST IMMEDIATE NEEDS TO FULLY PARTICIPATE IN UNITED WAY SUNCOAST'S PRIORITY AREAS OF EARLY LEARNING, YOUTH SUCCESS AND FINANCIAL STABILITY. PROGRAMS INCLUDE SCREENINGS AND TREATMENT OF DENTAL, VISION, AND ASTHMA ISSUES FOR CHILDREN; ACCESS TO IDENTIFIED LEGAL SUPPORTS FOR ADULTS, NUTRITION AND FOOD ASSISTANCE, AND INFORMATION/REFERRAL SERVICES. (CONTINUED ON SCHEDULE O)

4c (Code: ) (Expenses \$ 4,214,917. including grants of \$ 3,377,863. ) (Revenue \$ ) FINANCIAL STABILITY: TO ACHIEVE FINANCIAL STABILITY, FAMILIES MUST HAVE STABLE, ADEQUATE INCOME AS WELL AS STABLE, ADEQUATE FINANCIAL RESOURCES. STABLE, ADEQUATE INCOME IS DERIVED FROM A JOB PAYING FAMILY-SUSTAINING WAGES AND PUBLIC, EMPLOYER AND INFORMAL INCOME SUPPORTS AND SUBSIDIES. STABLE, ADEQUATE FINANCIAL RESOURCES INCLUDE SAVINGS AND ASSETS TO COVER UNEXPECTED EXPENSES, AFFORDABLE AND ACCESSIBLE GOODS AND SERVICES, AND SAFE, AFFORDABLE HOUSING. (CONTINUED ON SCHEDULE O)

4d Other program services (Describe on Schedule O.) (Expenses \$ 2,891,258. including grants of \$ 2,099,191. ) (Revenue \$ 136,501. )

4e Total program service expenses 15,067,689.

**Part IV Checklist of Required Schedules**

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

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

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....	<b>22</b> X	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....	<b>23</b> X	
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....	<b>24c</b>	
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....	<b>24d</b>	
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....	<b>27</b>	X
<b>28</b> 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):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28a</b>	X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28b</b>	X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in lines 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....	<b>29</b> X	
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	<b>34</b> X	
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>35a</b>	X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>35b</b>	
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? .....	<b>38</b> X	

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

**Part V Statements Regarding Other IRS Filings and Tax Compliance**

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

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

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

Table with columns for question number, question text, and Yes/No columns. Includes questions 2a through 16 regarding employee counts, tax returns, unrelated business income, foreign accounts, prohibited transactions, and charitable contributions.

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

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

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.		
	1a	24	
<b>b</b>	Enter the number of voting members included on line 1a, above, who are independent		
	1b	24	
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	X	
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
<b>6</b>	Did the organization have members or stockholders?	X	
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	X	
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b>	The governing body?	X	
<b>b</b>	Each committee with authority to act on behalf of the governing body?	X	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O		X

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

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

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed **FL**
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain on Schedule O)
- 19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records **DANIELLE LONG, VP FINANCE - (813) 274-0930**  
**5201 W KENNEDY BLVD, STE 600, TAMPA, FL 33609**

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See 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. See instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) JESSICA MUROFF PRESIDENT & CEO	45.00 1.00			X			205,811.	0.	7,345.	
(2) TIMOTHY DUTTON CEO UNITE PINELLAS	45.00 0.00					X	152,655.	0.	17,485.	
(3) EMERY IVERY CHIEF IMPACT OFFICER	45.00 0.00			X			154,802.	0.	13,070.	
(4) M. BRONWYN BEIGHTOL MANATEE AREA PRESIDENT	45.00 0.00					X	123,881.	0.	18,073.	
(5) BEMETRA SIMMONS CHIEF STRATEGY & OPERATIONS	45.00 0.00			X			131,179.	0.	957.	
(6) DALLAS SMITH JR. VP INFORMATION TECHNOLOGY	45.00 0.00					X	115,148.	0.	16,357.	
(7) JAN RESCH VP MAJOR GIFTS	45.00 0.00					X	109,664.	0.	11,678.	
(8) GAIL NURSEY CHIEF DEVELOPMENT OFFICER	45.00 0.00					X	103,028.	0.	4,391.	
(9) BRIAN DEMING CHAIR	1.00 0.00	X					0.	0.	0.	
(10) DAN VIGNE IMMEDIATE PAST CHAIR	1.00 0.00	X					0.	0.	0.	
(11) DAVID PIZZO VICE CHAIR	0.50 0.00	X					0.	0.	0.	
(12) KIMBERLY HOPPER SECRETARY	0.50 0.00	X					0.	0.	0.	
(13) TRACI LARSEN (1/1/21-6/30/21) TREASURER/FINANCE CHAIR	1.00 0.00	X					0.	0.	0.	
(14) DAVID WALKER (7/1/20-12/31/20) PAST TREASURER/FINANCE CHAIR	1.00 0.00	X					0.	0.	0.	
(15) LORI BAGGETT DIRECTOR (8/26/20-6/30/21)	0.25 0.00	X					0.	0.	0.	
(16) ERIC BAILEY DIRECTOR	0.25 0.00	X					0.	0.	0.	
(17) MELVA MCKAY BASS DIRECTOR (1/1/21-6/30/21)	0.25 0.00	X					0.	0.	0.	



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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) JAMES CAMP DIRECTOR (1/1/21-6/30/21)	0.25 0.00	X						0.	0.	0.
(19) SCOTT CURTIS DIRECTOR	0.25 0.00	X						0.	0.	0.
(20) JACKI DEZELSKI DIRECTOR	1.00 0.00	X						0.	0.	0.
(21) RAE DOWLING DIRECTOR	1.00 0.00	X						0.	0.	0.
(22) J.P. DU BUQUE DIRECTOR (1/1/21-6/30/21)	0.25 0.00	X						0.	0.	0.
(23) JAMIE EGASTI DIRECTOR (1/1/21-6/30/21)	0.50 0.00	X						0.	0.	0.
(24) MARK FERNANDEZ DIRECTOR	0.25 0.00	X						0.	0.	0.
(25) ESTELLA GRAY DIRECTOR	0.50 0.00	X						0.	0.	0.
(26) BILL MERRILL DIRECTOR	0.25 0.00	X						0.	0.	0.
<b>1b Subtotal</b>								1,096,168.	0.	89,356.
<b>c Total from continuation sheets to Part VII, Section A</b>								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b>								1,096,168.	0.	89,356.

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 **10**

	Yes	No
3 Did the organization list any <b>former</b> officer, director, trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>		X
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? <i>If "Yes," complete Schedule J for such individual</i>	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>		X

**Section B. Independent Contractors**

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

(A) Name and business address	(B) Description of services	(C) Compensation
UPIC SOLUTIONS, 334 BEECHWOOD RD, STE 403, FORT MITCHELL, KY 41017	IT DATA HOSTING SERVICES & SUPPORT	233,482.
CLIFTON LARSON ALLEN LLP, 201 N FRANKLIN ST, STE 2500, TAMPA, FL 33602	INTERIM ACCOUNTING SERVICES	127,587.

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 **2**

SEE PART VII, SECTION A CONTINUATION SHEETS

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

Table with 6 main columns: (A) Name and title, (B) Average hours per week, (C) Position, (D) Reportable compensation from the organization, (E) Reportable compensation from related organizations, (F) Estimated amount of other compensation. Rows include individuals like BECKY PICKETT, JULIO RAMIREZ, THAIS RODRIGUEZ-CAEZ, STUART ROGEL, KAREN RUSHING, ALEX SINK, ROBERT THOMPSON, and BOB DUTKOWSKY.

Total to Part VII, Section A, line 1c

**Part VIII Statement of Revenue**

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

			(A)	(B)	(C)	(D)	
			Total revenue	Related or exempt function revenue	Unrelated business revenue	Revenue excluded from tax under sections 512 - 514	
Contributions, Gifts, Grants and Other Similar Amounts	<b>1 a</b> Federated campaigns	<b>1a</b>	35,517.				
	<b>b</b> Membership dues	<b>1b</b>					
	<b>c</b> Fundraising events	<b>1c</b>					
	<b>d</b> Related organizations	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>	1,389,878.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above	<b>1f</b>	37,420,854.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$ 307,010.				
	<b>h Total.</b> Add lines 1a-1f			38,846,249.			
Program Service Revenue	<b>2 a</b> SERVICE FEES	Business Code	561110	136,501.	136,501.		
	<b>b</b> FUNDRAISING FEES		561110	80,974.	80,974.		
	<b>c</b>						
	<b>d</b>						
	<b>e</b>						
	<b>f</b> All other program service revenue						
	<b>g Total.</b> Add lines 2a-2f			217,475.			
Other Revenue	<b>3</b> Investment income (including dividends, interest, and other similar amounts)			510,672.		510,672.	
	<b>4</b> Income from investment of tax-exempt bond proceeds						
	<b>5</b> Royalties						
	<b>6 a</b> Gross rents	<b>6a</b>	(i) Real				
			(ii) Personal				
	<b>b</b> Less: rental expenses	<b>6b</b>					
	<b>c</b> Rental income or (loss)	<b>6c</b>					
	<b>d</b> Net rental income or (loss)						
	<b>7 a</b> Gross amount from sales of assets other than inventory	<b>7a</b>	(i) Securities	6,008,216.	55,467.		
			(ii) Other				
	<b>b</b> Less: cost or other basis and sales expenses	<b>7b</b>	5,075,818.	18,286.			
	<b>c</b> Gain or (loss)	<b>7c</b>	932,398.	37,181.			
<b>d</b> Net gain or (loss)			969,579.		969,579.		
<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	<b>8a</b>						
<b>b</b> Less: direct expenses	<b>8b</b>						
<b>c</b> Net income or (loss) from fundraising events							
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19	<b>9a</b>						
<b>b</b> Less: direct expenses	<b>9b</b>						
<b>c</b> Net income or (loss) from gaming activities							
<b>10 a</b> Gross sales of inventory, less returns and allowances	<b>10a</b>						
<b>b</b> Less: cost of goods sold	<b>10b</b>						
<b>c</b> Net income or (loss) from sales of inventory							
Miscellaneous Revenue	<b>11 a</b>	Business Code					
	<b>b</b>						
	<b>c</b>						
	<b>d</b> All other revenue		624190	209.		209.	
	<b>e Total.</b> Add lines 11a-11d			209.			
<b>12 Total revenue.</b> See instructions			40,544,184.	217,475.	0.	1,480,460.	

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	10,762,900.	10,762,900.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22	68,500.	68,500.		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	548,558.	322,137.	155,470.	70,951.
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	4,111,552.	2,089,351.	792,387.	1,229,814.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	92,198.	44,096.	17,433.	30,669.
<b>9</b> Other employee benefits	470,603.	273,731.	54,711.	142,161.
<b>10</b> Payroll taxes	429,909.	240,637.	55,450.	133,822.
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management				
<b>b</b> Legal	22,420.	10,211.	11,070.	1,139.
<b>c</b> Accounting	64,620.	31,478.	16,332.	16,810.
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	150,032.		150,032.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch. O.)	322,843.	97,002.	208,291.	17,550.
<b>12</b> Advertising and promotion	398,040.	3,827.	392,412.	1,801.
<b>13</b> Office expenses	372,007.	222,493.	110,801.	38,713.
<b>14</b> Information technology	583,648.	321,371.	145,485.	116,792.
<b>15</b> Royalties				
<b>16</b> Occupancy	673,782.	345,299.	140,365.	188,118.
<b>17</b> Travel	10,148.	5,092.	2,438.	2,618.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	39,732.	3,372.	35,027.	1,333.
<b>20</b> Interest	16,672.	454.	15,952.	266.
<b>21</b> Payments to affiliates	260,165.	124,972.	58,618.	76,575.
<b>22</b> Depreciation, depletion, and amortization	140,148.	75,157.	31,380.	33,611.
<b>23</b> Insurance	47,759.	25,072.	9,421.	13,266.
<b>24</b> Other expenses. Itemize expenses not covered above (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> _____				
<b>b</b> _____				
<b>c</b> _____				
<b>d</b> _____				
<b>e</b> All other expenses _____	27,336.	537.	26,354.	445.
<b>25</b> Total functional expenses. Add lines 1 through 24e	19,613,572.	15,067,689.	2,429,429.	2,116,454.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				
Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**

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

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	7,331,985.	<b>1</b>	23,808,798.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....	5,558,699.	<b>3</b>	7,187,384.
	<b>4</b> Accounts receivable, net .....	258,658.	<b>4</b>	253,333.
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	123,780.	<b>9</b>	84,159.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 4,151,523.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 2,548,288.	<b>10c</b>	1,603,235.
	<b>11</b> Investments - publicly traded securities .....	23,856,180.	<b>11</b>	29,103,358.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	5,822,435.	<b>15</b>	7,204,274.
<b>16 Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	44,526,386.	<b>16</b>	69,244,541.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	1,137,465.	<b>17</b>	1,041,386.
	<b>18</b> Grants payable .....	6,785,870.	<b>18</b>	7,591,109.
	<b>19</b> Deferred revenue .....	420,344.	<b>19</b>	470,807.
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....	1,030,500.	<b>24</b>	0.
	<b>25</b> 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 .....	373,595.	<b>25</b>	457,746.
	<b>26 Total liabilities.</b> Add lines 17 through 25 .....	9,747,774.	<b>26</b>	9,561,048.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	24,728,616.	<b>27</b>	47,552,234.
	<b>28</b> Net assets with donor restrictions .....	10,049,996.	<b>28</b>	12,131,259.
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> Total net assets or fund balances .....	34,778,612.	<b>32</b>	59,683,493.
	<b>33</b> Total liabilities and net assets/fund balances .....	44,526,386.	<b>33</b>	69,244,541.

**Part XI Reconciliation of Net Assets**

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	40,544,184.
2	Total expenses (must equal Part IX, column (A), line 25)	2	19,613,572.
3	Revenue less expenses. Subtract line 2 from line 1	3	20,930,612.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	34,778,612.
5	Net unrealized gains (losses) on investments	5	5,504,301.
6	Donated services and use of facilities	6	-14,955.
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain on Schedule O)	9	-1,515,077.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	59,683,493.

**Part XII Financial Statements and Reporting**

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

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

Form 990 (2020)

**SCHEDULE A**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

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

▶ Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

**2020**

Open to Public Inspection

Name of the organization **UNITED WAY SUNCOAST, INC.** Employer identification number **59-3725701**

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

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

- 1  A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2  A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 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.)
- 11  An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12  An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box 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 .....
- g Provide the following information about the supported organization(s).

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

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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	21834685.	25664942.	20619892.	18979073.	38846249.	125944841
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	21834685.	25664942.	20619892.	18979073.	38846249.	125944841
<b>5</b> 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) .....						35059758.
<b>6 Public support.</b> Subtract line 5 from line 4.						90885083.

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>7</b> Amounts from line 4 .....	21834685.	25664942.	20619892.	18979073.	38846249.	125944841
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	477,819.	501,833.	560,895.	600,396.	510,672.	2651615.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....	3,677.					3,677.
<b>11 Total support.</b> Add lines 7 through 10						128600133
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	1,961,535.
<b>13 First 5 years.</b> 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 <b>stop here</b> .....						<input type="checkbox"/>

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

<b>14</b> Public support percentage for 2020 (line 6, column (f), divided by line 11, column (f)) .....	<b>14</b>	70.67 %
<b>15</b> Public support percentage from 2019 Schedule A, Part II, line 14 .....	<b>15</b>	64.82 %
<b>16a 33 1/3% support test - 2020.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2019.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2020.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2019.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....		<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....		<input type="checkbox"/>



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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> 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 .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2016	(b) 2017	(c) 2018	(d) 2019	(e) 2020	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

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

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

<b>15</b> Public support percentage for 2020 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2019 Schedule A, Part III, line 15 .....	<b>16</b>	%

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

<b>17</b> Investment income percentage for 2020 (line 10c, column (f), divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from 2019 Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2020.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization

**b 33 1/3% support tests - 2019.** 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 box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? <i>If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV Supporting Organizations** (continued)

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

**Section B. Type I Supporting Organizations**

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

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> 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)? <i>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).</i>		

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

	Yes	No
<b>1</b> 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?		
<b>2</b> 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? <i>If "No," explain in Part VI how the organization maintained a close and continuous working relationship with the supported organization(s).</i>		
<b>3</b> By reason of the relationship described in line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? <i>If "Yes," describe in Part VI the role the organization's supported organizations played in this regard.</i>		

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

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
<b>2</b> Activities Test. Answer lines 2a and 2b below.		
<b>a</b> 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? <i>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.</i>	Yes	No
<b>b</b> Did the activities described in line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>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.</i>		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.		
<b>a</b> 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? <i>If "Yes" or "No" provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		

**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.

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

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

<b>Section C - Distributable Amount</b>			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

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

<b>Section D - Distributions</b>		<b>Current Year</b>
<b>1</b>	Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>
<b>2</b>	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>
<b>3</b>	Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>
<b>4</b>	Amounts paid to acquire exempt-use assets	<b>4</b>
<b>5</b>	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i> )	<b>5</b>
<b>6</b>	Other distributions ( <i>describe in Part VI</i> ). See instructions.	<b>6</b>
<b>7</b>	<b>Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>
<b>8</b>	Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions.	<b>8</b>
<b>9</b>	Distributable amount for 2020 from Section C, line 6	<b>9</b>
<b>10</b>	Line 8 amount divided by line 9 amount	<b>10</b>

<b>Section E - Distribution Allocations</b> (see instructions)	<b>(i) Excess Distributions</b>	<b>(ii) Underdistributions Pre-2020</b>	<b>(iii) Distributable Amount for 2020</b>
<b>1</b> Distributable amount for 2020 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2020 (reasonable cause required - <i>explain in Part VI</i> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2020			
<b>a</b> From 2015			
<b>b</b> From 2016			
<b>c</b> From 2017			
<b>d</b> From 2018			
<b>e</b> From 2019			
<b>f</b> <b>Total</b> of lines 3a through 3e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2020 distributable amount			
<b>i</b> Carryover from 2015 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2020 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2020 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2020, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>6</b> Remaining underdistributions for 2020. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>7</b> <b>Excess distributions carryover to 2021.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2016			
<b>b</b> Excess from 2017			
<b>c</b> Excess from 2018			
<b>d</b> Excess from 2019			
<b>e</b> Excess from 2020			

Schedule A (Form 990 or 990-EZ) 2020



**Schedule B**

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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2020**

Name of the organization

**UNITED WAY SUNCOAST, INC.**

Employer identification number

**59-3725701**

Organization type (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

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

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

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

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

501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

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

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

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

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

Name of organization  <b>UNITED WAY SUNCOAST, INC.</b>	Employer identification number  <b>59-3725701</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	<hr/> <hr/> <hr/>	\$ <u>20,000,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	<hr/> <hr/> <hr/>	\$ <u>5,601,409.</u>	Person <input checked="" type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	<hr/> <hr/> <hr/>	\$ <u>2,211,275.</u>	Person <input checked="" type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	<hr/> <hr/> <hr/>	\$ <u>1,031,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	<hr/> <hr/> <hr/>	\$ <u>1,030,500.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Name of organization  <b>UNITED WAY SUNCOAST, INC.</b>	Employer identification number  <b>59-3725701</b>
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____
	<div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div> <div style="border-bottom: 1px solid black; margin-bottom: 2px;"> </div>	\$ _____	_____

Name of organization  <b>UNITED WAY SUNCOAST, INC.</b>	Employer identification number  <b>59-3725701</b>
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

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

**SCHEDULE C**  
**(Form 990 or 990-EZ)**

**Political Campaign and Lobbying Activities**

OMB No. 1545-0047

**2020**

**Open to Public Inspection**

Department of the Treasury  
Internal Revenue Service

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

**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 <b>UNITED WAY SUNCOAST, INC.</b>	Employer identification number <b>59-3725701</b>
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**Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.**

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

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

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

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

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

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

**For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.** **Schedule C (Form 990 or 990-EZ) 2020**

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

- A** Check  if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures).
- B** Check  if the filing organization checked box A and "limited control" provisions apply.

<b>Limits on Lobbying Expenditures</b> (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals
<b>1a</b> Total lobbying expenditures to influence public opinion (grassroots lobbying) .....			
<b>b</b> Total lobbying expenditures to influence a legislative body (direct lobbying) .....			
<b>c</b> Total lobbying expenditures (add lines 1a and 1b) .....			
<b>d</b> Other exempt purpose expenditures .....		19,613,572.	
<b>e</b> Total exempt purpose expenditures (add lines 1c and 1d) .....		19,613,572.	
<b>f</b> Lobbying nontaxable amount. Enter the amount from the following table in both columns.		1,000,000.	
<b>If the amount on line 1e, column (a) or (b) is:</b>	<b>The lobbying nontaxable amount is:</b>		
Not over \$500,000	20% of the amount on line 1e.		
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.		
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.		
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.		
Over \$17,000,000	\$1,000,000.		
<b>g</b> Grassroots nontaxable amount (enter 25% of line 1f) .....		250,000.	
<b>h</b> Subtract line 1g from line 1a. If zero or less, enter -0- .....		0.	
<b>i</b> Subtract line 1f from line 1c. If zero or less, enter -0- .....		0.	
<b>j</b> If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year? .....		<input type="checkbox"/> Yes <input type="checkbox"/> No	

**4-Year Averaging Period Under Section 501(h)**  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the separate instructions for lines 2a through 2f.)

<b>Lobbying Expenditures During 4-Year Averaging Period</b>					
Calendar year (or fiscal year beginning in)	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) Total
<b>2a</b> Lobbying nontaxable amount	1,000,000.	1,000,000.	1,000,000.	1,000,000.	4,000,000.
<b>b</b> Lobbying ceiling amount (150% of line 2a, column(e))					6,000,000.
<b>c</b> Total lobbying expenditures	65,400.	5,700.			71,100.
<b>d</b> Grassroots nontaxable amount	250,000.	250,000.	250,000.	250,000.	1,000,000.
<b>e</b> Grassroots ceiling amount (150% of line 2d, column (e))					1,500,000.
<b>f</b> Grassroots lobbying expenditures	62,900.				62,900.

Schedule C (Form 990 or 990-EZ) 2020

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

For each "Yes" response on lines 1a through 1i below, provide in Part IV a detailed description of the lobbying activity.	(a)		(b)
	Yes	No	Amount
<b>1</b> 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:			
<b>a</b> Volunteers? .....			
<b>b</b> Paid staff or management (include compensation in expenses reported on lines 1c through 1i)? ..			
<b>c</b> Media advertisements? .....			
<b>d</b> Mailings to members, legislators, or the public? .....			
<b>e</b> Publications, or published or broadcast statements? .....			
<b>f</b> Grants to other organizations for lobbying purposes? .....			
<b>g</b> Direct contact with legislators, their staffs, government officials, or a legislative body? .....			
<b>h</b> Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means? .....			
<b>i</b> Other activities? .....			
<b>j</b> Total. Add lines 1c through 1i .....			
<b>2a</b> Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? .....			
<b>b</b> If "Yes," enter the amount of any tax incurred under section 4912 .....			
<b>c</b> If "Yes," enter the amount of any tax incurred by organization managers under section 4912 .....			
<b>d</b> If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year? .....			

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

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

**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."**

<b>1</b> Dues, assessments and similar amounts from members .....	<b>1</b>
<b>2</b> Section 162(e) nondeductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).	
<b>a</b> Current year .....	<b>2a</b>
<b>b</b> Carryover from last year .....	<b>2b</b>
<b>c</b> Total .....	<b>2c</b>
<b>3</b> Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues .....	<b>3</b>
<b>4</b> 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? .....	<b>4</b>
<b>5</b> Taxable amount of lobbying and political expenditures (See instructions) .....	<b>5</b>

**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.

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**SCHEDULE D**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.**  
▶ **Attach to Form 990.**

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

OMB No. 1545-0047

**2020**

**Open to Public Inspection**

**Name of the organization** UNITED WAY SUNCOAST, INC. **Employer identification number** 59-3725701

**Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

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

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

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

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

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

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

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

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

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

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

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

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

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.** Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

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

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

(i) Revenue included on Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

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

a Revenue included on Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule D (Form 990) 2020

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange program
  - e  Other \_\_\_\_\_
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?  Yes  No

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

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

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

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	24,484,184.	24,105,009.	23,218,425.	19,296,126.	17,838,781.
b Contributions	57,999.	41,374.	446,975.	4,074,144.	40,726.
c Net investment earnings, gains, and losses	6,212,365.	801,501.	1,213,999.	1,584,361.	1,868,019.
d Grants or scholarships					
e Other expenditures for facilities and programs	901,203.	463,700.	774,390.	1,736,206.	451,400.
f Administrative expenses					
g End of year balance	29,853,345.	24,484,184.	24,105,009.	23,218,425.	19,296,126.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  67.8677 %
  - b Permanent endowment  12.5011 %
  - c Term endowment  19.6312 %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |   | Yes | No |
|---|-----|----|
| (i) Unrelated organizations   | X   |    |
| (ii) Related organizations  |     | X  |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? <input type="checkbox"/> | 3b  |    |
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

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

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		386,245.		386,245.
b Buildings		1,332,835.	422,833.	910,002.
c Leasehold improvements		1,008,550.	947,082.	61,468.
d Equipment		1,423,893.	1,178,373.	245,520.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				1,603,235.

**Part VII Investments - Other Securities.**

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

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

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

(a) Description	(b) Book value
(1) ACCRUED INTEREST RECEIVABLE	32,783.
(2) CASH SURRENDER VALUE - LIFE INSURANCE	85,618.
(3) GIFTED FACILITY	46,186.
(4) COMMUNITY FOUNDATION INVESTMENTS	7,039,687.
(5)	
(6)	
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 15.) ▶	7,204,274.

**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) ANNUITIES PAYABLE	182,156.
(3) CAPITAL LEASE OBLIGATIONS	174,921.
(4) OBLIGATION UNDER REMAINDER TRUST	
(5) AGREEMENT	51,473.
(6) DEFERRED LEASE INCENTIVE	49,196.
(7)	
(8)	
(9)	
<b>Total.</b> (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶	457,746.

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



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

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

1	Total revenue, gains, and other support per audited financial statements		1	41,613,305.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:			
	a Net unrealized gains (losses) on investments	2a	5,504,301.	
	b Donated services and use of facilities	2b	1,228.	
	c Recoveries of prior year grants	2c		
	d Other (Describe in Part XIII.)	2d	-1,516,049.	
	e Add lines 2a through 2d	2e	3,989,480.	
3	Subtract line 2e from line 1		3	37,623,825.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a	150,032.	
	b Other (Describe in Part XIII.)	4b	2,770,327.	
	c Add lines 4a and 4b	4c	2,920,359.	
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)		5	40,544,184.

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

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

1	Total expenses and losses per audited financial statements		1	17,777,077.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:			
	a Donated services and use of facilities	2a	16,183.	
	b Prior year adjustments	2b		
	c Other losses	2c		
	d Other (Describe in Part XIII.)	2d		
	e Add lines 2a through 2d	2e	16,183.	
3	Subtract line 2e from line 1		3	17,760,894.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:			
	a Investment expenses not included on Form 990, Part VIII, line 7b	4a	150,032.	
	b Other (Describe in Part XIII.)	4b	1,702,646.	
	c Add lines 4a and 4b	4c	1,852,678.	
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)		5	19,613,572.

**Part XIII Supplemental Information.**

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

**PART V, LINE 4:**

THE ENDOWMENT FUNDS WERE ESTABLISHED TO PROVIDE FUTURE SUPPORT FOR THE ORGANIZATION'S MISSION. THE ORGANIZATION'S INTERNALLY-CONTROLLED ENDOWMENT NET ASSETS ARE COMPRISED OF INVESTMENTS HELD IN VARIOUS DONOR ENDOWMENTS, INVESTMENTS HELD UNDER A CHARITABLE REMAINDER UNITRUST AGREEMENT, AND FUNDS DESIGNATED BY THE BOARD OF DIRECTORS TO FUNCTION AS ENDOWMENTS.

**PART X, LINE 2:**

THE ORGANIZATION IS EXEMPT FROM FEDERAL INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND FROM STATE INCOME TAXES UNDER THE PROVISIONS OF THE FLORIDA STATUTES. THE INTERNAL REVENUE CODE PROVIDES FOR TAXATION OF UNRELATED BUSINESS INCOME UNDER CERTAIN CIRCUMSTANCES. THE

**Part XIII** Supplemental Information (continued)

ORGANIZATION REPORTS NO UNRELATED BUSINESS TAXABLE INCOME; HOWEVER, SUCH STATUS IS SUBJECT TO FINAL DETERMINATION UPON EXAMINATION OF THE RELATED INCOME TAX RETURNS BY THE APPROPRIATE TAXING AUTHORITIES. THE ORGANIZATION HAS ADOPTED THE PROVISIONS OF ASC TOPIC 740 RELATING TO ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES AND DOES NOT BELIEVE IT HAS ANY MATERIAL INCOME TAX EXPOSURE RELATING TO UNCERTAIN TAX POSITIONS. THE INCOME TAX FILINGS FOR UNITED WAY SUNCOAST, INC., UNITED WAY OF MANATEE COUNTY, INC. AND UNITED WAY FOUNDATION OF MANATEE COUNTY FOR THE YEAR ENDED JUNE 30, 2018 AND THEREAFTER REMAIN SUBJECT TO EXAMINATION.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

PROVISION FOR UNCOLLECTIBLE PLEDGES	-1,526,720.
CHANGE IN CSV OF LIFE INSURANCE	10,671.
TOTAL TO SCHEDULE D, PART XI, LINE 2D	-1,516,049.

PART XI, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED CONTRIBUTIONS	1,702,646.
GAIN ON SALE OF ASSETS	37,181.
GAIN ON FORGIVENESS OF PPP LOAN	1,030,500.
TOTAL TO SCHEDULE D, PART XI, LINE 4B	2,770,327.

PART XII, LINE 4B - OTHER ADJUSTMENTS:

DONOR DESIGNATED CONTRIBUTIONS	1,702,646.
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**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

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

▶ **Attach to Form 990.**

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

OMB No. 1545-0047

**2020**

**Open to Public  
Inspection**

Name of the organization **UNITED WAY SUNCOAST, INC.** Employer identification number **59-3725701**

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

- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?  **Yes**  **No**
- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments.** Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of non-cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> Purpose of grant or assistance
BOYS & GIRLS CLUBS OF THE SUNCOAST 4625 E BAY DR STE 103 CLEARWATER, FL 33764	59-1566799	501(C)(3)	394,689.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HEART OF FLORIDA UNITED WAY, INC 1940 TRAYLOR BLVD ORLANDO, FL 32804	59-0808854	501(C)(3)	293,316.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BIG BROTHERS BIG SISTERS - TAMPA BAY - 4630 WOODLAND CORPORATE BLVD STE 160 - TAMPA, FL 33614	59-2173085	501(C)(3)	280,453.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BOYS & GIRLS CLUBS OF TAMPA BAY 1307 N MACDILL AVE TAMPA, FL 33607	59-0624368	501(C)(3)	273,777.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BAY AREA LEGAL SERVICES, INC 1302 N 19TH ST SUITE 400 TAMPA, FL 33605	59-1171886	501(C)(3)	225,132.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CRISIS CENTER OF TAMPA BAY INC ONE CRISIS CENTER PLAZA TAMPA, FL 33613	59-1785265	501(C)(3)	214,528.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

**2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **▶ 136.**

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

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

Schedule I (Form 990) 2020

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FEEDING AMERICA TAMPA BAY 4702 TRANSPORT DR BLDG 6 TAMPA, FL 33605	59-2116576	501(C)(3)	214,432.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
JEWISH FAMILY & CHILDREN'S SERVICE OF THE SUNCOAST - 2688 FRUITVILLE RD - SARASOTA, FL 34237	59-2693318	501(C)(3)	195,919.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PINELLAS COUNTY URBAN LEAGUE, INC. 333 31ST ST N ST. PETERSBURG, FL 33713	59-1665523	501(C)(3)	186,238.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CORPORATION TO DEVELOP COMMUNITIES OF TAMPA, INC - 1907 E HILLSBOROUGH AVE STE 100 - TAMPA, FL 33610	59-3150608	501(C)(3)	181,385.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
REDLANDS CHRISTIAN MIGRANT ASSOCIATION (RCMA) - 402 W MAIN ST - IMMOKALEE, FL 34142	59-1221966	501(C)(3)	168,786.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
METROPOLITAN MINISTRIES 2002 N FLORIDA AVE TAMPA, FL 33602	59-1477007	501(C)(3)	162,951.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA FAMILY HEALTH CENTERS, INC. PO BOX 82969 TAMPA, FL 33682	59-2420282	501(C)(3)	161,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CATHOLIC CHARITIES DIOCESE OF ST PETERSBURG - 1213 16TH ST N - ST. PETERSBURG, FL 33705	59-0875805	501(C)(3)	153,423.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CHILDREN FIRST, INC. 1723 N ORANGE AVE SARASOTA, FL 34234	59-0968249	501(C)(3)	150,648.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
PINELLAS EX OFFENDER RE ENTRY COALITION - 12810 US HWY 19N - CLEARWATER, FL 33764	59-3643636	501(C)(3)	150,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HOMELESS EMERGENCY PROJECT 1120 N BETTY LN CLEARWATER, FL 33755	59-2729694	501(C)(3)	147,196.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GULF COAST LEGAL SERVICES INC ATTN: OPERATIONS COORDINATOR ST. PETERSBURG, FL 33701	59-1882749	501(C)(3)	144,135.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GULF COAST JEWISH FAMILY AND COMMUNITY SERVICES - 14041 ICOT BLVD - CLEARWATER, FL 33760	59-1229354	501(C)(3)	142,953.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SUNCOAST VOICES FOR CHILDREN FOUNDATION - 8550 ULMERTON ROAD, SUITE 255 - LARGO, FL 33771	20-1133518	501(C)(3)	140,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
AMSKILLS, INC. 7825 CAMPUS DR, BUILDING 6 NEW PORT RICHEY, FL 34653	82-3888203	501(C)(3)	140,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SUNRISE CHILDREN'S SERVICES 2215 E HENRY AVE TAMPA, FL 33610	59-0714818	501(C)(3)	135,827.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
A BRIGHTER COMMUNITY, INC. 1613 MARION ST TAMPA, FL 33602	59-0624453	501(C)(3)	131,703.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE SHIRLEY PROCTOR PULLER FOUNDATION - 4133 CORTEZ WAY S - ST. PETERSBURG, FL 33712	46-4930592	501(C)(3)	131,685.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNIVERSITY AREA COMMUNITY DEVELOPMENT CORPORATION, INC. - 14013 N 22ND STREET - TAMPA, FL 33613	31-1624121	501(C)(3)	125,264.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ST. PETERSBURG COLLEGE FOUNDATION, INC. - 6021 142ND AVE N - ST. PETERSBURG, FL 33733	59-1954362	501(C)(3)	124,629.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
211 TAMPA BAY CARES, INC. 14155 58TH ST N STE 211 CLEARWATER, FL 33760	59-3355555	501(C)(3)	123,477.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA METROPOLITAN AREA YMCA 110 E OAK AVE TAMPA, FL 33602	59-1742909	501(C)(3)	117,730.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BOYS & GIRLS CLUBS OF SARASOTA COUNTY - 3100 FRUITVILLE RD - SARASOTA, FL 34237	59-6211876	501(C)(3)	114,709.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARLY LEARNING COALITION OF SARASOTA COUNTY, INC. - 1750 17TH ST BLDG L - SARASOTA, FL 34234	65-1110174	501(C)(3)	113,434.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
FRIENDS OF THE CHILDREN, TAMPA BAY 2655 ULMERTON RD CLEARWATER, FL 33762	82-5141973	501(C)(3)	104,779.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PERSONAL ENRICHMENT THROUGH MENTAL HEALTH SERVICES - PEMHS - 11254 58TH ST N - PINELLAS PARK, FL 33782	59-3153549	501(C)(3)	103,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CHAMPIONS FOR CHILDREN 3108 W AZEELE ST TAMPA, FL 33609	59-1807551	501(C)(3)	102,986.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
R'CLUB CHILD CARE - HAPPY WORKERS LEARNING CENTER - 920 19TH ST S - ST. PETERSBURG, FL 33712	27-4826221	501(C)(3)	100,531.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ALLIANCE FOR PUBLIC SCHOOLS FOUNDATION - 5810 FALCONCREEK PL - LITHIA, FL 33547	45-5598673	501(C)(3)	100,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
FLORIDA DREAM CENTER 4017 56TH AVE N ST. PETERSBURG, FL 33714	46-0663472	501(C)(3)	97,910.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ST. PETERSBURG FREE CLINIC 863 3RD AVE N ST. PETERSBURG, FL 33701	23-7208280	501(C)(3)	91,940.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
STARTING RIGHT NOW 1212 W CASS ST TAMPA, FL 33606	26-3725699	501(C)(3)	85,714.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE CHILDREN'S HOME NETWORK INC. 10909 MEMORIAL HWY TAMPA, FL 33615	59-0696284	501(C)(3)	85,688.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PACE CENTER FOR GIRLS - HILLSBOROUGH - 1933 E HILLSBOROUGH AVE STE 300 - TAMPA, FL 33610	59-2414492	501(C)(3)	83,610.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HISPANIC SERVICES COUNCIL 7825 N DALE MABRY HWY SUITE 102 TAMPA, FL 33614	59-3198934	501(C)(3)	80,011.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SAFE CHILDREN COALITION, INC. 1500 INDEPENDENCE BLVD, SUITE #210 SARASOTA, FL 34234	59-1618413	501(C)(3)	75,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TAMPA BAY WORKFORCE ALLIANCE INC. DBA CAREERSOURCE TAMPA BAY - 4902 EISENHOWER BLVD., SUITE 250 - TAMPA, FL 33634	59-3655316	501(C)(3)	75,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ENTERPRISING LATINAS, INC. 18238 US HWY 301 WIMAUMA, FL 33598	27-1247381	501(C)(3)	75,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SUNCOAST CENTER 4024 CENTRAL AVE ST. PETERSBURG, FL 33711	59-2092717	501(C)(3)	72,280.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SENIORS IN SERVICE OF TAMPA BAY, INC. - 1306 W SLIGH AVE - TAMPA, FL 33604	59-2422975	501(C)(3)	67,331.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PINELLAS COUNTY SCHOOLS PO BOX 2942 LARGO, FL 33779	59-6000799	501(C)(3)	64,062.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GIRLS INCORPORATED OF PINELLAS 7700 61ST ST N PINELLAS PARK, FL 33781	59-0970201	501(C)(3)	63,393.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARLY LEARNING COALITION OF HILLSBOROUGH COUNTY - 6800 N DALE MABRY HWY SUITE 158 - TAMPA, FL 33614	59-3626765	501(C)(3)	62,829.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
DEVEREUX FOUNDATION, INC. 5850 T. G. LEE BLVD., SUITE 400 ORLANDO, FL 32822	23-1390618	501(C)(3)	62,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GLASSER/SCHOENBAUM HUMAN SERVICES CENTER - 1750 17TH STREET, BLDG J-1 - SARASOTA, FL 34234	59-2707877	501(C)(3)	60,964.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)



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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
EARLY LEARNING COALITION OF MANATEE COUNTY - 600 8TH AVE W STE 100 - PALMETTO, FL 34221	65-0811318	501(C)(3)	60,882.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
RELIGIOUS COMMUNITY SERVICES (RCS) 503 S MARTIN LUTHER KING JR AVE CLEARWATER, FL 33756	59-1309186	501(C)(3)	59,742.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
YMCA OF THE SUNCOAST, INC. 2469 ENTERPRISE RD CLEARWATER, FL 33763	59-0810731	501(C)(3)	57,573.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
UNITED FOOD BANK AND SERVICES 702 E ALSOBROOK ST SUITE H PLANT CITY, FL 33563	59-3069728	501(C)(3)	56,703.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PRESERVE VISION FLORIDA 9200 SEMINOLE BOULEVARD,SECOND FLOOR SEMINOLE, FL 33772	59-6181662	501(C)(3)	55,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BIG BROTHERS BIG SISTERS - SUN COAST/SARASOTA - 1000 S TAMiami TRL SUITE C - VENICE, FL 34285	59-1361826	501(C)(3)	52,609.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SALVATION ARMY - SARASOTA CORPS 1400 10TH ST SARASOTA, FL 34236	58-0660607	501(C)(3)	51,397.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
LIONS EYE INSTITUTE FOR TRANSPLANT AND RESEARCH FOUNDATION - 1410 N 21ST ST - TAMPA, FL 33605	58-1458151	501(C)(3)	50,775.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PINELLAS COMMUNITY FOUNDATION 17755 US HWY 19 N SUITE 150 CLEARWATER, FL 33764	23-7113194	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED COMMUNITY CENTERS, INC. DBA RUBONIA COMM CENTER BRADENTON, FL 34206	65-0282384	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SUNCOAST WORKFORCE BOARD INC DBA CAREERSOURCE SUNCOAST - 1112 MANATEE AVE E - BRADENTON, FL 34208	59-2334811	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GOODWILL INDUSTRIES-MANASOTA, INC. 2705 51ST AVE EAST BRADENTON, FL 34203	59-2074391	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BIG BROTHERS BIG SISTERS - SUN COAST/MANATEE - 1000 S. TAMIAMI TRAIL, SUITE C - VENICE, FL 34285	59-1361826	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARN TO LEARN FL INC. 27911 CROWN LAKE BLVD SUITE 223 BONITA SPRINGS, FL 34135	45-2514055	501(C)(3)	50,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BETH-EL FARMWORKER MINISTRY 18240 HIGHWAY 301 SOUTH WIMAUMA, FL 33598	59-3004876	501(C)(3)	47,885.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CATHOLIC CHARITIES DIOCESE OF VENICE - 1000 PINEBROOK RD - VENICE, FL 34285	59-2473176	501(C)(3)	46,158.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SOAR LEARNING CENTER, INC. 2731 N.LINKS AVENUE SARASOTA, FL 34234	81-4840233	501(C)(3)	45,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
WOMEN'S RESOURCE CENTER OF MANATEE 1926 MANATEE AVE W BRADENTON, FL 34205	59-3034653	501(C)(3)	42,571.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
EXCHANGE CLUB FAMILY PARTNERSHIP CENTER OF MANATEE - 602 3RD STREET EAST, SUITE A - BRADENTON, FL 34208	65-0374386	501(C)(3)	41,900.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
DAYSTAR LIFE CENTER 226 6TH ST S ST. PETERSBURG, FL 33701	65-0523539	501(C)(3)	39,860.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ACADEMY PREP CENTER OF TAMPA 1407 E. COLUMBUS DRIVE TAMPA, FL 33605	59-3622978	501(C)(3)	39,583.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GREATER TAMPA BAY AREA COUNCIL, INC., BOY SCOUTS OF AMERICA - LEWIS HILL, III SERVICE CENTER - TAMPA, FL 33612	59-0637815	501(C)(3)	39,289.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
UNITED METHODIST COOPERATIVE MINISTRIES / SUNCOAST, INC - 12945 SEMINOLE BLVD, BLDG 2 - LARGO, FL 33778	59-1623437	501(C)(3)	39,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SALVATION ARMY - ST. PETERSBURG 340 14TH AVE. S. ST PETERSBURG, FL 33701	58-0660607	501(C)(3)	39,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HEALTHY START COALITION OF HILLSBOROUGH COUNTY, INC - 2806 N. ARMENIA AVE. STE. 100 - TAMPA, FL 33607	59-3127943	501(C)(3)	37,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CAPITAL GOOD FUND 22 A STREET PROVIDENCE, RI 02907	80-0348384	501(C)(3)	36,156.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BESS THE BOOK BUS, INC. 2316 E 3RD AVE TAMPA, FL 33605	51-0518142	501(C)(3)	35,273.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
GOLDEN GENERATIONS 2900 PALLANZA DRIVE S. ST. PETERSBURG, FL 33705	23-2624207	501(C)(3)	35,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA JEWISH FAMILY SERVICES 13009 COMMUNITY CAMPUS DR STE 114 TAMPA, FL 33625	59-1549670	501(C)(3)	34,617.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SALVATION ARMY - BRADENTON CORPS 1204 14TH ST W BRADENTON, FL 34205	58-0660607	501(C)(3)	33,791.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BOYS & GIRLS CLUBS OF MANATEE COUNTY - 1215 MANATEE AVE W STE 200 - BRADENTON, FL 34205	59-0675141	501(C)(3)	31,603.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ALL FAITHS FOOD BANK 8171 BLAIKIE CT SARASOTA, FL 34240	65-0115814	501(C)(3)	31,291.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
MEALS ON WHEELS PLUS OF MANATEE 811 23RD AVE E BRADENTON, FL 34208	59-1420986	501(C)(3)	30,984.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE D.L.RANDALL FOUNDATION, INC. 1523 72ND ST.EAST RUBONIA, FL 34221	47-4988613	501(C)(3)	30,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
MYAKKA CITY COMMUNITY CENTER 37010 SINGLETARY RD MYAKKA CITY, FL 34251	59-1050657	501(C)(3)	30,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE CHILDREN'S HOME SOCIETY OF FLORIDA - 482 S.KELLER ROAD - ORLANDO, FL 32810	59-0192430	501(C)(3)	29,720.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
DAWNING FAMILY SERVICES 6718 N. ARMENIA AVE TAMPA, FL 33604	59-2655523	501(C)(3)	27,487.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
10091 AMERICAN RED CROSS TAMPA BAY CHAPTER - 3310 W MAIN ST - TAMPA, FL 33607	53-0196605	501(C)(3)	26,671.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PINELLAS OPPORTUNITY COUNCIL, INC. 501 1ST AVE N STE 517 ST. PETERSBURG, FL 33701	59-1227051	501(C)(3)	25,152.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
STEP UP SUNCOAST, INC. 6428 PARKLAND DRIVE SARASOTA, FL 34243	59-6208766	501(C)(3)	25,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BOOTSTRAP BUSINESS SCHOOL, INC 33 BROADWAY DUNEDIN, FL 34698	83-2586036	501(C)(3)	25,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ACADEMY PREP CENTER OF ST PETERSBURG - 2301 22ND AVE S - ST. PETERSBURG, FL 33712	59-3623000	501(C)(3)	24,079.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARLY CHILDHOOD COUNCIL OF HILLSBOROUGH COUNTY - 4210 W BAY VILLA AVE - TAMPA, FL 33611	59-2998189	501(C)(3)	22,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
NEIGHBORLY CARE NETWORK 13945 EVERGREEN AVE CLEARWATER, FL 33762	59-1218100	501(C)(3)	21,303.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PALMETTO YOUTH CENTER 501 17TH ST W PALMETTO, FL 34221	59-1090377	501(C)(3)	21,063.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
MOTHERS HELPING MOTHERS 5933 N.WASHINGTON BLVD SARASOTA, FL 34243	65-0416462	501(C)(3)	20,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
COMMUNITY FOUNDATION OF TAMPA BAY, INC. - 4300 W CYPRESS ST STE 700 - TAMPA, FL 33607	59-3001853	501(C)(3)	20,110.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PROJECT LIGHT OF MANATEE, INC. 1104 14TH STREET WEST BRADENTON, FL 34205	65-0490652	501(C)(3)	20,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARLY LEARNING COALITION OF FLORIDA'S HEARTLAND, INC. - 2886 TAMIAMI TRAIL STE 1 - PORT CHARLOTTE, FL 33952	64-1047991	501(C)(3)	20,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
UNITED WAY OF THE MID-SOUTH 1005 TILLMAN ST MEMPHIS, TN 38112	56-1010742	501(C)(3)	19,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA BAY NETWORK TO END HUNGER 4532 W KENNEDY BLVD TAMPA, FL 33609	36-4758155	501(C)(3)	19,202.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
COMMUNITY ACTION STOPS ABUSE, INC. (CASA) - 1011 1ST AVE N - ST. PETERSBURG, FL 33701	59-2114359	501(C)(3)	18,200.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE SPRING OF TAMPA BAY, INC 211 N WILLOW AVE TAMPA, FL 33606	59-1777135	501(C)(3)	18,125.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SALVATION ARMY - TAMPA AREA COMMAND - 1603 N FLORIDA AVE - TAMPA, FL 33602	58-0660607	501(C)(3)	17,495.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HEALTHY START COALITION OF PINELLAS, INC. - 4000 GETAWAY CENTRE BLVD STE 200 - PINELLAS PARK, FL 33782	59-3109517	501(C)(3)	16,250.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
GIRL SCOUTS WEST CENTRAL FLORIDA COUNCIL - 4610 EISENHOWER BLVD - TAMPA, FL 33634	59-0624454	501(C)(3)	15,751.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
YMCA OF GREATER ST. PETERSBURG 600 1ST AVE N STE 201 ST. PETERSBURG, FL 33701	59-0624468	501(C)(3)	14,779.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
RISE TAMPA 411 N FRANKLIN ST TAMPA, FL 33602	46-5291016	501(C)(3)	14,752.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA POLICE MEMORIAL FUND COMMITTEE, INC. - 411 N FRANKLIN ST - TAMPA, FL 33602	59-3397263	501(C)(3)	14,468.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA LIGHTHOUSE FOR THE BLIND 1106 W PLATT ST TAMPA, FL 33606	59-0637876	501(C)(3)	14,263.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
CHILDREN'S HOME SOCIETY OF FLORIDA GULF COAST DIVISION - 1515 MICHELIN CT - LUTZ, FL 33549	59-0192430	501(C)(3)	14,027.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
EARLY LEARNING COALITION OF PINELLAS COUNTY - 2536 COUNTRYSIDE BVD., #500 - CLEARWATER, FL 33763	53-3726679	501(C)(3)	13,769.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
ARTZ 4 LIFE ACADEMY 1751 KINGS HIGHWAY CLEARWATER, FL 33755	59-3483799	501(C)(3)	13,333.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED WAY OF PASCO COUNTY 17230 CAMELOT CT LAND O' LAKES, FL 34638	59-2193178	501(C)(3)	12,577.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
NONPROFIT LEADERSHIP CENTER OF TAMPA BAY - 1408 N WESTSHORE BOULEVARD, SUITE 140 - TAMPA, FL 33607	59-3671047	501(C)(3)	12,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
THE CENTRE FOR WOMEN, INC 305 S HYDE PARK AVE TAMPA, FL 33606	59-1787902	501(C)(3)	12,120.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PARC 3190 TYRONE BLVD N ST. PETERSBURG, FL 33710	59-0791038	501(C)(3)	10,689.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SCHOOL DISTRICT OF MANATEE 15 MANATEE AVE W BRADENTON, FL 34205	59-6000728	501(C)(3)	10,667.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PROJECT PROSPER 13575 58TH ST N CLEARWATER, FL 33760	45-0491407	501(C)(3)	10,440.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
UNIDOSNOW, INC. 1750 17TH ST BLDG D SARASOTA, FL 34234	27-4102169	501(C)(3)	10,132.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HEALTHY START COALITION OF PASCO, INC - P.O BOX 1527 - NEW PORT RICHEY, FL 34656	59-3155525	501(C)(3)	10,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
FLORIDA CENTER FOR EARLY CHILDHOOD 4620 17TH ST SARASOTA, FL 34235	59-1947024	501(C)(3)	9,982.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)



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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
UNITED WAY OF TARRANT COUNTY 1500 N MAIN ST SUITE 200 FORT WORTH, TX 76164	75-0858360	501(C)(3)	9,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
UNITED WAY OF SOUTHWEST LOUISIANA, INC. - 815 RYAN ST - LAKE CHARLES, LA 70601	72-0456901	501(C)(3)	9,500.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
SCHOOL DISTRICT OF DESOTO COUNTY 530 LASOLONA AVENUE ARCADIA, FL 34266	59-6000580	501(C)(3)	8,000.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HILLSBOROUGH COUNTY FIRE RESCUE FOUNDATION - 9450 E COLUMBUS DR - TAMPA, FL 33619	46-3310942	501(C)(3)	7,733.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
PINELLAS SHERIFF'S POLICE ATHLETIC LEAGUE, INC - 3755 46TH AVE N - ST. PETERSBURG, FL 33714	59-3760782	501(C)(3)	7,491.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HILLSBOROUGH COUNTY PUBLIC SCHOOLS 901 E KENNEDY BLVD TAMPA, FL 33602	59-6000660	501(C)(3)	6,933.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA FIREFIGHTERS CHARITY FUND, INC. - 3116 N BOULEVARD - TAMPA, FL 33603	55-0842602	501(C)(3)	6,674.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
AMERICAN CANCER SOCIETY - TAMPA 3709 W JETTON AVE TAMPA, FL 33629	13-1788491	501(C)(3)	6,374.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HILLSBOROUGH COUNTY FIREFIGHTER CHARITIES, INC. - 5425 N 59TH ST - TAMPA, FL 33610	03-0390529	501(C)(3)	5,976.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
HOPE FAMILY SERVICES 1201 8TH AVE W BRADENTON, FL 34205	59-1970241	501(C)(3)	5,908.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
BENTY PO BOX 1299 IRMO, SC 29063	27-5198009	501(C)(3)	5,580.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
TAMPA FIREFIGHTERS MUSEUM 720 ZACK ST TAMPA, FL 33602	59-3467403	501(C)(3)	5,071.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING
HILLSBOROUGH EDUCATION FOUNDATION 2306 N HOWARD AVE TAMPA, FL 33607	59-2883361	501(C)(3)	5,019.	0.	N/A	N/A	ALLOCATIONS, DESIGNATIONS, DISASTER RELIEF RESPONSE, GRANTS & PROGRAM IMPACT FUNDING

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

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
INDIVIDUAL SAVINGS ACCOUNT (IDA) PROGRAM MATCHES	6	20,500.	0.	N/A	N/A
TRAINING PROGRAM TUITION (GED, CNA, CPR/AED, ETC.)	36	48,000.	0.	N/A	N/A

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

PART I, LINE 2:

MONITORING POLICIES FOR ALLOCATED GRANT FUNDING:

ALL ORGANIZATIONS RECEIVING GRANT FUNDING HAVE PASSED AN INITIAL APPLICATION PROCESS THAT DEMANDS QUALIFICATION BASED ON QUALITY AND ACCOUNTABILITY FOR ALL ASPECTS OF THE ORGANIZATION (GOVERNANCE, FISCAL, PERSONNEL MANAGEMENT, AND PROGRAMS). ONCE ELIGIBLE, AGENCIES ARE INVITED TO APPLY ANNUALLY (OR ON A TIMELINE DETERMINED BY THE BOARD) FOR SUPPORT OF SPECIFIC PROGRAMS ADDRESSING CRITICAL COMMUNITY NEED. PROGRAM APPLICATIONS ARE REVIEWED BY TEAMS OF STAFF AND VOLUNTEERS IN THE INVESTMENT REVIEW

**Part IV** Supplemental Information

PROCESS. RECOMMENDATIONS FROM THESE TEAMS GO TO THE COMMUNITY AND PARTNERSHIP DEVELOPMENT COMMITTEE FOR APPROVAL BEFORE GOING TO THE BOARD FOR FINAL APPROVAL.

PROGRAM GRANT CRITERIA INCLUDES:

ALIGNMENT WITH UNITED WAY'S IMPACT AGENDA, PROGRAM PERFORMANCE, AND NEED OR AVAILABILITY OF FUNDS FROM OTHER SOURCES. QUALIFYING FOR FUNDING AS AN AGENCY DOES NOT GUARANTEE FUNDING FOR PROGRAM APPLICATIONS. GRANT PERFORMANCE IS REVIEWED EVERY 6 MONTHS OR AS DETERMINED NECESSARY BY STAFF AND VOLUNTEERS.

**SCHEDULE J  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Compensation Information**

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

OMB No. 1545-0047

**2020**

Open to Public Inspection

Name of the organization

**UNITED WAY SUNCOAST, INC.**

Employer identification number

**59-3725701**

**Part I Questions Regarding Compensation**

**1a** Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

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

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

**2** Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? .....

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Schedule J (Form 990) 2020

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) JESSICA MUROFF PRESIDENT & CEO	(i)	192,527.	0.	13,284.	0.	7,345.	213,156.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(2) TIMOTHY DUTTON CEO UNITE PINELLAS	(i)	151,097.	0.	1,558.	6,000.	11,485.	170,140.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
(3) EMERY IVERY CHIEF IMPACT OFFICER	(i)	152,154.	0.	2,648.	5,812.	7,258.	167,872.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							



**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2020**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

Name of the organization **UNITED WAY SUNCOAST, INC.** Employer identification number **59-3725701**

Part I	Types of Property			
	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1	Art - Works of art			
2	Art - Historical treasures			
3	Art - Fractional interests			
4	Books and publications			
5	Clothing and household goods			
6	Cars and other vehicles			
7	Boats and planes			
8	Intellectual property			
9	Securities - Publicly traded	X	40 307,010.	STOCK QUOTE
10	Securities - Closely held stock			
11	Securities - Partnership, LLC, or trust interests			
12	Securities - Miscellaneous			
13	Qualified conservation contribution - Historic structures			
14	Qualified conservation contribution - Other			
15	Real estate - Residential			
16	Real estate - Commercial			
17	Real estate - Other			
18	Collectibles			
19	Food inventory			
20	Drugs and medical supplies			
21	Taxidermy			
22	Historical artifacts			
23	Scientific specimens			
24	Archeological artifacts			
25	Other ( )			
26	Other ( )			
27	Other ( )			
28	Other ( )			

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part V, Donee Acknowledgement **29** **0**

	Yes	No
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?		X
b If "Yes," describe the arrangement in Part II.		
31 Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	X	
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?		X
b If "Yes," describe in Part II.		
33 If the organization didn't report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II.		

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2020



**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.

Multiple horizontal lines for supplemental information.

**SCHEDULE O**  
**(Form 990 or 990-EZ)**

Department of the Treasury  
Internal Revenue Service

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

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

**2020**

Open to Public  
Inspection

Name of the organization

UNITED WAY SUNCOAST, INC.

Employer identification number

59-3725701

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

UNITED WAY SUNCOAST SEVERS THE CONSTRAINTS THAT PREVENT FAMILIES FROM THRIVING. WE DISMANTLE THE BARRIERS TO HUMAN PROSPERITY, UNITING OUR COMMUNITY ALONG THE WAY. WHEN WE PROVIDE PATHWAYS TO EARLY LEARNING, FINANCIAL STABILITY AND YOUTH SUCCESS, WE LIFT UP FAMILIES AS THEY CULTIVATE A FUTURE BEYOND THE CIRCUMSTANTIAL CONSTRAINTS PUT ON THEM. WE PROVIDE CHOICES. WE PROVIDE OPPORTUNITIES. WE CREATE SPACE FOR FAMILIES TO GROW WITHOUT LIMITATIONS, ELEVATING COMMUNITIES BY BUILDING A FUTURE WITH EQUITY FOR ALL. WE ARE PROUD TO SERVE THE PEOPLE OF DESOTO, HILLSBOROUGH, MANATEE, PINELLAS AND SARASOTA COUNTIES BY OPERATING AND FUNDING SERVICES AND PROGRAMS TO HELP OUR COMMUNITY HAVE THE FREEDOM TO RISE.

FORM 990, PART III, LINE 3, CHANGES IN PROGRAM SERVICES:

UNITE PINELLAS DISCONTINUED IN APRIL 2021. SEE PROGRAM DESCRIPTION ON SCHEDULE O IN RESPONSE TO FORM 990, PART III, LINE 4D.

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

STRATEGIES INCLUDE IMPROVING THE QUALITY OF EARLY CARE AND EDUCATION, HELPING FAMILIES ACQUIRE APPROPRIATE KNOWLEDGE OF AND/OR ENGAGEMENT IN THEIR CHILD'S DEVELOPMENT, PROVIDING ACCESS TO BOOKS FOR CHILDREN, QUALITY OUT-OF-SCHOOL TIME OPPORTUNITIES THAT REINFORCE LEARNING, AND IMPROVING ABSENTEEISM AND TARDINESS IN TARGETED SCHOOLS AND NEIGHBORHOODS, MENTORING AND TUTORING, AND REDUCING BARRIERS TO LEARNING DUE TO DENTAL, VISION, ASTHMA AND NUTRITION ISSUES.

Name of the organization

UNITED WAY SUNCOAST, INC.

Employer identification number

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THROUGH OUR INVESTMENT OF \$2.72 MILLION, LOCAL CHILDREN RECEIVED SUPPORT FROM UNITED WAY TO IMPROVE THEIR EDUCATIONAL OPPORTUNITIES. WE PROVIDED 3,035 BOOKS FOR THE CHILDREN IN SUMMER PROGRAMMING. 78% MAINTAINED OR INCREASED THEIR READING LEVEL. IN ADDITION TO AGENCY-BASED PROGRAMS, UNITED WAY SUNCOAST DIRECTLY MANAGES SPECIFIC PROGRAMS FOCUSED ON EARLY LEARNING TO HELP CHILDREN IN THE SUNCOAST REGION SUCCEED.

SUMMER CARE: IN ORDER TO PREVENT LEARNING LOSS OVER THE SUMMER, UNITED WAY SUNCOAST BUDGETS \$450,000 IN SCHOLARSHIPS FOR LOW-INCOME CHILDREN TO ATTEND FREE, FULL-TIME, HIGH-QUALITY SUMMER PROGRAMS. ADULT FAMILY MEMBERS OF CHILDREN RECEIVING SCHOLARSHIPS ATTEND EDUCATIONAL WORKSHOPS TO HELP BUILD MORE FINANCIALLY SECURE HOUSEHOLDS. ALL CHILDREN AT THE SUMMER CARE SITES RECEIVE A SUMMER BRIDGE BOOK AND SPEND A MINIMUM OF 30 MINUTES WORKING ON THE CURRICULUM DAILY, WITH SOME STRUGGLING READERS GETTING ADDITIONAL TUTORING SUPPORT. DURING THE SUMMER OF 2021, 608 CHILDREN RECEIVED SCHOLARSHIPS.

READING ALL-STARS: READING ALL-STARS IS AN ACADEMIC MENTORING AND TUTORING PROGRAM FOR CHILDREN IN GRADES K-5. THE PROGRAM FOCUSES ON HELPING STRUGGLING READERS EXCEL, TO FOSTER AN APPRECIATION FOR READING IN CHILDREN, AND TO BUILD LITERACY SKILLS. THROUGH READING ALL-STARS, VOLUNTEER READING COACHES DIRECTLY IMPACT CHILDREN'S ACADEMIC SUCCESS BY SPENDING 30 MINUTES EACH WEEK VIRTUALLY READING WITH STUDENTS WHO NEED HELP THE MOST, MAKING SURE THEY HAVE THE BEST CHANCE FOR SUCCESS. IN FISCAL 2021, OUR COMBINED READING ALL-STARS PROGRAM IN HILLSBOROUGH AND PINELLAS COUNTIES COLLECTIVELY HAD 63 VOLUNTEERS, SERVED 78 CHILDREN, AND GAVE 228 TAKE-HOME BOOKS.

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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MYON: THE MYON PARTNERSHIP PROVIDES ALL CHILDREN FROM BIRTH THROUGH EIGHTH GRADE IN HILLSBOROUGH AND PINELLAS COUNTIES WITH ACCESS TO MORE THAN 8,500 E-BOOKS. THE GOAL OF THE MYON PARTNERSHIP IS TO PROVIDE EACH CHILD IN OUR COMMUNITY WITH EQUITABLE ACCESS TO THE LARGEST COLLECTION OF ENHANCED DIGITAL BOOKS TO ENCOURAGE READING, INCREASE LITERACY RATES, AND PROMOTE LITERACY THROUGHOUT THE REGION. IN FISCAL 2021, HILLSBOROUGH COUNTY STUDENTS BROWSED 5,291,143 BOOKS AND READ 1,363,241 BOOKS. PINELLAS COUNTY SAW STUDENTS BROWSE 1,970,620 BOOKS AND READ 640,417 BOOKS.

QUALITY CHILDCARE INITIATIVE: UNITED WAY SUNCOAST OFFICIALLY LAUNCHED ITS QUALITY CHILDCARE INITIATIVE AT MRS. B'S IN ARCADIA. IN COLLABORATION WITH LOCAL EARLY LEARNING COALITIONS, UNITED WAY SUNCOAST SUPPORTS THE KEY QUALITY COMPONENTS OF CHILDCARE AT SELECTED EARLY CHILDCARE CENTERS IN SARASOTA, DESOTO, AND MANATEE COUNTY. IT SEEKS TO ENHANCE THE LEARNING ENVIRONMENTS OF EARLY LEARNING CENTERS, ESTABLISH AN EXPERIENCED AND STABLE WORKFORCE, CREATE CONSISTENT FAMILY ENGAGEMENT AND REFERRALS AND ADVOCATE.

READING ROOMS: IN MANATEE COUNTY, TWO READING ROOMS HAVE BEEN ESTABLISHED TO BRING EARLY EDUCATION RESOURCES AND PROGRAMS TO WHERE THE MOST VULNERABLE CHILDREN AND FAMILIES LIVE: COMMUNITY SUPPORTED HOUSING NEIGHBORHOODS. THE INITIATIVE IS DESIGNED TO ELIMINATE THE BARRIERS TO QUALITY EDUCATION, WHILE PROVIDING A PLATFORM TO FINANCIAL STABILITY RESOURCES FOR FAMILIES.

CAMPAIGN FOR GRADE-LEVEL READING: UNITED WAY IS THE LEAD AGENCY FOR THE

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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SUNCOAST CAMPAIGN FOR GRADE-LEVEL READING IN DESOTO AND MANATEE COUNTIES, WHERE THROUGH PARTNERSHIPS WITH THE SCHOOL DISTRICTS, COMMUNITY FOUNDATIONS, COUNTY GOVERNMENT, EARLY LEARNING COALITIONS AND OTHER STRATEGIC COMMUNITY PARTNERS, THE COMMUNITY COMES TOGETHER TO IMPROVE READING RATES. THE BIG PLAN IN MANATEE COUNTY CONTINUED ITS FOCUS ON 10 NEIGHBORHOOD SCHOOLS WITH A GOAL OF DOUBLING THE NUMBER OF THIRD GRADERS READING ON LEVEL BY 2026. WE EXPANDED THE EFFORT BY FUNDING FIVE PARAPROFESSIONALS FOR THE SCHOOL DISTRICT. IN DESOTO COUNTY, A COMMUNITY COALITION SEEKS TO IMPROVE READING RATES BY EXPLORING AND REMOVING SYSTEMIC BARRIERS TO ACCESS AND EQUITY IN EARLY EDUCATION.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:  
 VOLUNTEER SUPPORT: VOLUNTEERS SUPPORT MUCH OF THE WORK THAT IS DONE BOTH INTERNALLY AT UNITED WAY AS WELL AS EXTERNALLY THROUGH OUR VARIOUS PROGRAMS AND PARTNERS. IN FISCAL 2021, UNITED WAY SUNCOAST LED 3,663 VOLUNTEERS TO DEVOTE 38,022 HOURS TO 48 DIFFERENT ORGANIZATIONS IN OUR FIVE-COUNTY REGION. THIS INCLUDES A SUCCESSFUL WEEK OF CARING EFFORT IN APRIL THAT SAW 426 VOLUNTEERS AND COMPLETED 71 PROJECTS FOR 33 NONPROFIT ORGANIZATIONS. THE 1,286 HOURS THEY DEVOTED DURING WEEK OF CARING HELD A VALUE OF \$36,702. FOR THE YEAR, THE WORK TRANSLATES TO \$1,085,109 OF VOLUNTEER SUPPORT DELIVERED BACK INTO OUR COMMUNITY. WE ALSO WITNESSED A 56% INCREASE IN THE AVERAGE NUMBER OF HOURS SERVED PER VOLUNTEER.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:  
 UNITED WAY SUNCOAST FINANCIAL STABILITY STRATEGIES INCLUDE: INCREASE ENROLLMENT IN AND COMPLETION OF DEGREE, CERTIFICATION AND/OR TRAINING

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PROGRAMS; PROVIDE SUPPORTS TO HELP INDIVIDUALS RETAIN EMPLOYMENT AND ENHANCE THEIR CAREERS; INCREASE FINANCIAL KNOWLEDGE AND SKILLS; CONNECT LOW-INCOME WORKING FAMILIES WITH AFFORDABLE HOUSING; INCREASE AWARENESS OF AVAILABLE INCOME SUPPORTS THROUGH EDUCATION AND OUTREACH EFFORTS; AND IMPROVE PRODUCTS AND SYSTEMS THAT ENABLE LOW-INCOME WORKING FAMILIES TO SAVE.

THROUGH OUR INVESTMENT OF \$2.07 MILLION IN FINANCIAL STABILITY PROGRAMS IN 2021, ADULTS WERE PROVIDED PRE-EMPLOYMENT SERVICES AND FINANCIAL EDUCATION SUPPORTS TO HELP MOVE FORWARD ON THE PATH TO FINANCIAL STABILITY. OF THOSE ADULTS WHO TOOK A CERTIFICATION OR LICENSING PROGRAM, MOST RECEIVED OR MADE STRONG GROWTH TOWARD THIS LICENSE, INCREASING THE FINANCIAL STABILITY OF THEIR HOUSEHOLD. IN ADDITION TO AGENCY-BASED PROGRAMS, UNITED WAY SUNCOAST DIRECTLY MANAGES SPECIFIC PROGRAMS FOCUSED ON FINANCIAL STABILITY TO HELP FAMILIES IN THE SUNCOAST REGION SUCCEED.

FREE INCOME TAX PREPARATION/VOLUNTEER INCOME TAX ASSISTANCE: UNITED WAY SUNCOAST BELIEVES THAT NO LOW TO MODERATE INCOME HOUSEHOLDS SHOULD PAY SOMEONE TO FILE THEIR TAXES. EACH YEAR, WE HELP RESIDENTS WITH A HOUSEHOLD INCOME OF \$66,000 OR LESS KEEP THEIR HARD EARNED MONEY BY OFFERING FREE INCOME TAX PREPARATION THROUGH THE VOLUNTEER INCOME TAX ASSISTANCE PROGRAM. DURING THE 2021 TAX YEAR, 8,449 TAX RETURNS WERE PREPARED BY TRAINED VITA VOLUNTEERS, RETURNING NEARLY \$11 MILLION TO OUR FIVE-COUNTY REGION.

INDIVIDUAL DEVELOPMENT ACCOUNTS: UNITED WAY SUNCOAST'S INDIVIDUAL DEVELOPMENT ACCOUNT (IDA) IS A MATCHED SAVINGS ACCOUNT PROGRAM THAT

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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HELPS LOW-INCOME INDIVIDUALS ACHIEVE THEIR GOALS OF BUYING A HOME, ATTENDING SCHOOL OR OPENING A BUSINESS. ELIGIBLE PARTICIPANTS ARE REQUIRED TO SAVE MONEY WHILE ALSO ACQUIRING CRITICAL FINANCIAL EDUCATION AND LONG-TERM MONEY MANAGEMENT SKILLS. DURING FISCAL YEAR 2021, SIX (6) INDIVIDUALS COMPLETED THE PROGRAM RESULTING IN \$8,500 SAVED BY PARTICIPANTS BACKED BY \$16,000 IN MATCHED FUNDS DISTRIBUTED BY UNITED WAY SUNCOAST FOR HOME, BUSINESS, AND EDUCATION.

FINANCIAL COACHING: THE UNITED WAY SUNCOAST FINANCIAL COACHING PROGRAM TRAINS AND PARTNERS VOLUNTEERS WITH INDIVIDUALS WHO ARE READY TO TAKE CONTROL OF THEIR FINANCIAL SITUATION. IN THE 2021 FISCAL YEAR, 15 INDIVIDUALS WERE MATCHED WITH A FINANCIAL COACH IN THE TAMPA AREA AND COMPLETED 35 COACHING SESSIONS.

BANK ON SUNCOAST: BANK ON IS A LOCAL COALITION THAT WORKS WITH COMMUNITY STAKEHOLDERS TO IMPROVE THE FINANCIAL STABILITY OF INDIVIDUALS WHO DO NOT HAVE ANY BANK ACCOUNTS OR USE ALTERNATIVE FINANCIAL SERVICES, LIKE CHECK CASHING SERVICES AND PAYDAY LOANS. BANK ON'S GOAL IS TO ENSURE THE UNBANKED AND THE UNDERBANKED GAIN ACCESS TO SAFE AND AFFORDABLE BANKING PRODUCTS AND SERVICES. DURING FISCAL 2021, BANK ON ACCOUNTS INCREASED FROM 7 TO 20.

RESOURCE CENTERS: WE MAINTAIN THREE RESOURCE CENTERS SULPHUR SPRINGS (TAMPA), NORTH GREENWOOD (CLEARWATER) AND CAMPBELL PARK (ST. PETERSBURG), UNDERSCORING OUR COMMITMENT TO PLACE-BASED COMMUNITY INITIATIVES. EACH CENTER FOCUSES ON WORKFORCE DEVELOPMENT AND ECONOMIC SUPPORTS FOR AREA RESIDENTS AND HAVE BECOME PART OF THE FABRIC OF THE COMMUNITY IN THE AREA IT REPRESENTS. IN FISCAL 2021, COMMUNITY MEMBERS

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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MADE 3,500 VISITS TO OUR CENTERS FOR SERVICES, AND WEEKLY FOOD DISTRIBUTIONS WERE CONDUCTED DURING THE FIRST HALF OF THE YEAR. THE CENTERS ALSO TRAINED 40 COMMUNITY MEMBERS TO BECOME CERTIFIED NURSING ASSISTANTS OR PHLEBOTOMISTS.

EVICTIION MITIGATION: DURING THE FOURTH QUARTER OF FISCAL 2021, UNITED WAY SUNCOAST DEVOTED \$3 MILLION TOWARDS ADDRESSING THE EVICTIION CRISIS IN OUR FIVE-COUNTY REGION. THE EVICTIION DEFENSE PLAN FOCUSES ON SIX MAIN AREAS ACROSS ALL FIVE COUNTIES, INCLUDING FUNDING RENTAL NAVIGATOR POSITIONS THROUGH STRATEGIC PARTNERS.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:  
DONOR DESIGNATED CONTRIBUTIONS: CONTRIBUTIONS TO UNITED WAY THAT DONORS DIRECT TO SPECIFIC 501(C)(3) AGENCIES.  
EXPENSES \$ 1,702,646. INCL GRANTS OF \$ 1,702,646. REVENUE \$ 136,501.

YOUTH SUCCESS: GRADUATING FROM HIGH SCHOOL ON-TIME IS AN ESSENTIAL BUILDING BLOCK FOR FUTURE SUCCESS. UNITED WAY SUNCOAST INVESTS \$314,000 IN ORDER TO SUPPORT OUR STRATEGIES OF INCREASING QUALITY OUT-OF-SCHOOL TIME EXPERIENCES THAT REINFORCE LEARNING, INCREASING PARENTAL INVOLVEMENT AND CONNECTION TO SCHOOLS, EXPOSING YOUTH TO LIFE AND WORKFORCE SKILLS, AND IMPROVING ABSENTEEISM AND TARDINESS IN TARGETED SCHOOLS AND NEIGHBORHOODS. IN ADDITION TO AGENCY-BASED PROGRAMS, UNITED WAY SUNCOAST DIRECTLY MANAGES SPECIFIC PROGRAMS FOCUSED ON YOUTH SUCCESS TO HELP YOUTH IN THE SUNCOAST REGION SUCCEED.

OPERATION GRADUATE: OPERATION GRADUATE IN PINELLAS COUNTY PROVIDES EDUCATIONAL OPPORTUNITIES AND A FOCUS ON LIFE SKILLS TO DEVELOP A



Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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FOUNDATION FOR TEENS TO BECOME SUCCESSFUL, CONTRIBUTING MEMBERS OF SOCIETY. THE PROGRAM TARGETS TEENS THAT HAVE BEEN IDENTIFIED AS AT-RISK OR NOT ACHIEVING THEIR FULL POTENTIAL. THIS INCLUDES HIGH SCHOOL STUDENTS WHO ARE IN THE "ACADEMIC MIDDLE" - NOT IN THE HIGHEST OR LOWEST QUARTER OF STUDENTS ACADEMICALLY; MIDDLE AND HIGH SCHOOL STUDENTS THAT ARE BEHIND IN THE NUMBER OF CREDITS NEEDED TO GRADUATE ON TIME; AND MIDDLE AND HIGH SCHOOL STUDENTS THAT WERE RECOMMENDED BY SCHOOL PERSONNEL OR COMMUNITY MEMBERS AS NEEDING SUPPORT AND ACADEMIC TUTORING AFTER SCHOOL TO IMPROVE GRADES. THE PROGRAM HAS THREE TRACKS: DUAL ENROLLMENT, CREDIT RECOVERY, AND TUTORING. IN FISCAL 2021, THE PROGRAM CONTINUES TO HAVE 100% OF ITS DUAL ENROLLMENT STUDENTS COMPLETE THE PROGRAM AND SUCCESSFULLY GRADUATED ON TIME WITH A HIGH SCHOOL DIPLOMA AND AN ASSOCIATE ARTS DEGREE.

PARTNERSHIP PROGRAMS: UNITED WAY SUNCOAST PARTNERS WITH THE BOYS & GIRLS CLUB OF TAMPA BAY AND THE BOYS & GIRLS CLUB OF THE SUNCOAST TO FUND PROGRAMS THAT HELP PREPARE MIDDLE SCHOOL AND HIGH SCHOOL STUDENTS FOR POST-SECONDARY OPPORTUNITY. THE BOYS & GIRLS CLUB OF TAMPA BAY'S THINK BIG FOR KIDS PROGRAM INTRODUCES STUDENTS AGES 12-18 TO EXCITING CAREER OPPORTUNITIES, PROVIDES MENTORSHIP AND ASSISTS THEM IN ACHIEVING POST-GRADUATION GOALS, THROUGH AN EXPANSION OF THE YOUTH EMPLOYMENT SERVICES (YES) PROGRAM. THE BOYS & GIRLS CLUB OF SUNCOAST'S TEEN WORKFORCE DEVELOPMENT PROGRAM EMPHASIZES CAREER EXPLORATION, SKILLS DEVELOPMENT AND WORK-BASED LEARNING EXPERIENCES.

EXPENSES \$ 1,182,616. INCLUDING GRANTS OF \$ 396,545. REVENUE \$ 0.

DURING FISCAL YEAR JUNE 30, 2019, UNITED WAY SUNCOAST PARTNERED WITH FOUNDATION FOR HEALTHY ST. PETERSBURG AND PINELLAS COUNTY JUVENILE

Name of the organization

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WELFARE BOARD TO CREATE UNITE PINELLAS. UNITE PINELLAS IS A COLLECTIVE OF ORGANIZATIONS UNITED IN A COMMON MISSION TO INCREASE INCOME AND RACE EQUITY THROUGH COUNTYWIDE SYSTEMS CHANGE. UNITE PINELLAS FOCUSES ON POLICY SOLUTIONS AS A PART OF A CONTINUUM OF MANY PEOPLE AND ORGANIZATIONS WHO HAVE A LONG HISTORY OF WORKING FOR FAIRNESS AND JUSTICE.

UNITE PINELLAS DEVELOPED AN EQUITY PROFILE USED TO HELP PINPOINT SOME AREAS THAT DESERVE MORE DETAILED EXAMINATION RELATED TO POLICIES, INSTITUTIONAL PRACTICES, AND NARRATIVES. PEOPLE MOST IMPACTED BY THOSE ISSUES, IN CONCERT WITH POLICY AND PRACTICE SPECIALISTS, WILL DEVELOP SOLUTIONS AND INFLUENCE THEIR ADOPTION. THE NONPROFIT, PHILANTHROPIC AND GOVERNMENTAL SECTORS WILL BE ENCOURAGED TO INCREASE THE LEVEL OF DIVERSITY AND INCLUSION WITHIN THEIR ORGANIZATIONS CODIFIED BY SPECIFIC POLICIES.

UNITE PINELLAS DISCONTINUED IN APRIL 2021.

EXPENSES \$ 5,996. INCLUDING GRANTS OF \$ 0. REVENUE \$ 0.

STRATEGIC VISION: IN 2021, UNITED WAY SUNCOAST UNVEILED A NEW STRATEGIC VISION. THE FIVE-YEAR PLAN WILL ELEVATE AND ENHANCE OUR CURRENT WORK AND FOCUS ON EARLY LEARNING, YOUTH SUCCESS AND FINANCIAL STABILITY. IT WILL ALSO UNDERSCORE OUR ROLE AS A LEADER, CONVENER AND PARTNER. WE WILL DEEPEN OUR COMMUNITY PARTNER ROLE, ENGAGE VOLUNTEERS AND DONORS AS PARTNERS IN CARING, AND INFUSE DIVERSITY, EQUITY AND INCLUSION IN ALL THAT WE DO.

RISE TASK FORCE: FORMED AFTER WE RECEIVED A TRANSFORMATIONAL GIFT FROM

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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PHILANTHROPIST MACKENZIE SCOTT, THE RISE TASK FORCE DETERMINED A PROCESS AND ORGANIZATION STRATEGY FOR THE GIFT THAT ALIGNED WITH THE STRATEGIC VISION WHILE STAYING FOCUSED ON THE KEY IMPACT AREAS: EARLY LEARNING, YOUTH SUCCESS AND FINANCIAL STABILITY.

FORM 990, PART VI, SECTION A, LINE 4:

THE ORGANIZATION'S BYLAWS WERE AMENDED AND RESTATED EFFECTIVE OCTOBER 28, 2020. REVISIONS INCLUDE: (1) THE NUMBER OF DIRECTORS WAS UPDATED TO NO FEWER THAN 18 AND NO MORE THAN 30; (2) THE TITLE OF THE EXECUTIVE OFFICER HAS BEEN CHANGED FROM PRESIDENT TO CHIEF EXECUTIVE OFFICER; AND (3) THE VACANCIES AND REMOVAL PROCESS FOR THE AREA BOARDS HAS BEEN CLARIFIED. ADDITIONS INCLUDE: (1) VIRTUAL MEETINGS OF THE BOARD OF DIRECTORS ARE PERMISSIBLE WHEN DEEMED NECESSARY BY THE CHAIR; (2) THE BOARD OF DIRECTORS MAY ESTABLISH OTHER COMMITTEES, SPECIAL COMMITTEES, AND/OR TASK FORCE GROUPS AS IT DEEMS NECESSARY OR ADVISABLE; AND (3) THE CHAIR OF THE BOARD IS AUTHORIZED TO DECIDE WHETHER AND HOW UNITED WAY SUNCOAST WILL VOTE ON UNITED WAY WORLDWIDE MEMBER VOTES AFTER CONSULTATION WITH THE CEO (THE CHAIR MAY CHOOSE TO CONSULT WITH THE EXECUTIVE COMMITTEE OR BOARD MEMBERS AT THE CHAIR'S DISCRETION BEFORE SUCH VOTE OCCURS).

FORM 990, PART VI, SECTION A, LINE 6:

THE CORPORATION HAS THREE CLASSES OF MEMBERS: THE MEMBERS OF THE MANATEE AREA BOARD (MANATEE MEMBERS), THE MEMBERS OF THE SARASOTA/DESOTO AREA BOARD (SARASOTA/DESOTO MEMBERS), AND THE MEMBERS OF THE HILLSBOROUGH/PINELLAS AREA BOARD (HILLSBOROUGH/PINELLAS MEMBERS). EACH AREA BOARD SHALL CONSIST OF NOT LESS THAN 9 AND NOT MORE THAN 25 MEMBERS. THE PURPOSES OF EACH AREA BOARD ARE: (A) TO LEAD FUNDRAISING IN THE COUNTIES APPLICABLE TO SUCH AREA BOARD; (B) TO HAVE A SUBSTANTIAL ROLE WITH RESPECT TO THE ALLOCATION OF

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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FUNDS RAISED WITH RESPECT TO SUCH COUNTIES TO AGENCIES AND INITIATIVES  
LOCATED IN SUCH COUNTIES; (C) TO APPOINT THE MEMBERS OF SUCH AREA BOARD;  
AND (D) TO APPOINT CERTAIN INDIVIDUALS TO THE BOARD OF DIRECTORS OF THE  
CORPORATION.

EACH AREA BOARD SHALL MEET SEPARATELY NOT LESS THAN FOUR TIMES PER YEAR.  
ONE OF SUCH MEETINGS SHALL BE AN ANNUAL MEETING. AT EACH ANNUAL MEETING OF  
AN AREA BOARD, THE MEMBERS OF THE AREA BOARD SHALL ELECT A CHAIR, VICE  
CHAIR, AND SECRETARY.

FORM 990, PART VI, SECTION A, LINE 7A:

EACH AREA BOARD SHALL SUBMIT TO THE BOARD OF DIRECTORS OF THE CORPORATION,  
NOT EARLIER THAN 90 DAYS, AND NOT LATER THAN 30 DAYS, BEFORE THE DATE OF  
EACH ANNUAL MEETING OF THE BOARD OF DIRECTORS, THE NAME OF ANY INDIVIDUAL  
WHOM SUCH AREA BOARD WISHES TO ELECT TO THE BOARD OF DIRECTORS OF THE  
CORPORATION AT SUCH ANNUAL MEETING. SUCH INDIVIDUAL SHALL BE DEEMED ELECTED  
TO THE BOARD OF DIRECTORS OF THE CORPORATION AT SUCH ANNUAL MEETING UNLESS  
SUCH ELECTION IS VETOED BY A VOTE OF NOT LESS THAN TWO-THIRDS OF THE ENTIRE  
BOARD OF DIRECTORS. WITHIN 10 DAYS AFTER ANY SUCH VETO, THE AREA BOARD  
WHOSE ELECTION WAS VETOED MAY SUBMIT TO THE BOARD OF DIRECTORS THE NAME OF  
ANOTHER INDIVIDUAL WHOM THE AREA BOARD PROPOSES TO ELECT TO THE BOARD OF  
DIRECTORS INSTEAD OF THE INDIVIDUAL WHO WAS VETOED, AND SUCH OTHER  
INDIVIDUAL WILL BECOME A MEMBER OF THE BOARD OF DIRECTORS UNLESS, AT OR  
BEFORE THE NEXT REGULARLY SCHEDULED MEETING OF THE BOARD OF DIRECTORS, SUCH  
OTHER INDIVIDUAL'S ELECTION IS VETOED BY THE VOTE OF NOT LESS THAN  
TWO-THIRDS OF THE ENTIRE BOARD OF DIRECTORS. THE APPLICABLE AREA BOARD  
SHALL CONTINUE TO SUBMIT THE NAMES OF INDIVIDUALS PURSUANT TO THE PROCESS  
DESCRIBED ABOVE UNTIL AN INDIVIDUAL IS NOT VETOED BY THE BOARD OF

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DIRECTORS. ANY VETOES SHALL BE FINAL AND BINDING ON THE AREA BOARD AND EACH INDIVIDUAL WHO WAS VETOED.

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

UPON APPROVAL BY THE AUDIT AND ETHICS COMMITTEE, THE DRAFT FORM 990 IS SENT TO THE UNITED WAY SUNCOAST REGIONAL BOARD FOR REVIEW AND APPROVAL. THE BOARD SENDS BACK, VIA ELECTRONIC VOTING, AN APPROVAL OF THE RETURN AS PRESENTED BEFORE FILING. IT IS MANDATORY THAT THERE BE 100% PARTICIPATION BY THE MEMBERS OF THE BOARD TO VOTE BEFORE A FINAL JUDGEMENT CAN BE MADE.

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

ANNUALLY ALL BOARD MEMBERS AND STAFF ARE REQUIRED TO COMPLETE AND SUBMIT A SIGNED CONFLICT OF INTEREST FORM TO THE GOVERNANCE COMMITTEE. THE GOVERNANCE COMMITTEE REVIEWS ALL SUBMISSIONS AND, IF NECESSARY, FOLLOWS UP WITH ANY POSSIBLE CONFLICTS. ANY MEMBERS WITH CONFLICTS MUST RECUSE THEMSELVES FROM ANY RELATED ACTION OR VOTE.

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

THE EXECUTIVE COMPENSATION COMMITTEE IS A COMMITTEE OF THE BOARD OF DIRECTORS, AND IS RESPONSIBLE, SUBJECT TO APPROVAL OF THE BOARD, FOR ESTABLISHING AND MAINTAINING A BROAD COMPETITIVE COMPENSATION PROGRAM FOR THE EXECUTIVES OF UNITED WAY SUNCOAST IN ORDER TO ATTRACT, RETAIN, AND MOTIVATE EXECUTIVE LEVEL EMPLOYEES; AND FOR ENSURING THAT THE COMPENSATION PROGRAM MEETS ALL LEGAL REQUIREMENTS UNDER THE IRS INTERMEDIATE SANCTION RULES AND BEST GOVERNANCE PRACTICES FOR TRANSPARENCY AND ACCOUNTABILITY. THE COMMITTEE MAKES RECOMMENDATIONS TO THE BOARD WITH RESPECT TO COMPENSATION PROGRAM STRUCTURE, POLICY, PAY LEVELS AND SUCCESSION PLANS FOR KEY STAFF.

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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THE EXECUTIVE COMPENSATION COMMITTEE REGULARLY REVIEWS COMPENSATION COMPARABILITY DATA. BIANNUALLY, AN INDEPENDENT CONSULTANT CONDUCTS A COMPENSATION STUDY FOR THE ORGANIZATION INCLUDING THE CEO. THE LAST STUDY WAS CONDUCTED MAY 2021.

"EXECUTIVES" REFERS TO THE CHIEF EXECUTIVE OFFICER (CEO), THE CHIEF FINANCIAL OFFICER (CFO), CEO DIRECT REPORTS AND/OR ANY EMPLOYEE THAT HAS SIGNIFICANT MANAGEMENT RESPONSIBILITY FOR A SEGMENT OF THE ORGANIZATION OR WOULD OTHERWISE BE CONSIDERED A "DISQUALIFIED PERSON" UNDER THE INTERMEDIATE SANCTION RULES.

THE COMMITTEE CONSISTS OF THREE OR MORE MEMBERS, THE MAJORITY (TWO) OF WHICH SHALL BE MEMBERS OF THE BOARD OF DIRECTORS. THE COMMITTEE CHAIR IS APPOINTED BY THE BOARD CHAIR, AND MUST BE A MEMBER OF THE BOARD. WHENEVER POSSIBLE, THE BOARD CHAIR WILL SERVE AS THE VICE CHAIR OF THE COMMITTEE IN RECOGNITION OF HIS/HER RELATIONSHIP TO THE CEO AND HIS/HER RESPONSIBILITY IN CARRYING OUT THE CEO PERFORMANCE REVIEW ON BEHALF OF THE BOARD OF DIRECTORS. COMMITTEE MEMBERS ARE RECRUITED BY THE COMMITTEE CHAIR. THE COMMITTEE INCLUDES MEMBERS OF THE COMMUNITY WHO POSSESS EXPERIENCE AND EXPERTISE IN HUMAN RESOURCES, BENEFITS OR COMPENSATION.

THE CEO PRESENTS THE RECOMMENDED SALARY AND TOTAL BENEFITS COMPENSATION FOR OTHER KEY EXECUTIVES ANNUALLY TO THE EXECUTIVE COMPENSATION COMMITTEE FOR APPROVAL.

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

THE ORGANIZATION MAKES ITS FINANCIAL STATEMENTS, ANNUAL REPORT, AND ITS

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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FORM 990 AVAILABLE TO THE PUBLIC ON ITS WEBSITE AS WELL AS UPON REQUEST.

GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY ARE AVAILABLE UPON REQUEST.

FORM 990, PART VII:

AT THE BEGINNING OF 2018, UNITED WAY SUNCOAST (UWS), FOUNDATION OF HEALTHY ST PETE (FHSP) AND JUVENILE WELFARE BOARD (JWB) PARTNERED TO CREATE UNITE PINELLAS, A COMMUNITY COLLABORATION PROGRAM. THE MAJORITY OF FUNDING FOR THIS COLLABORATION COMES FROM FHSP AND JWB WITH A MINOR AMOUNT COMING FROM UWS. UWS ACTS AS THE FISCAL AGENT FOR THIS PROGRAM AND THUS, THE UWS FINANCE DEPARTMENT PROCESSES UNITE PINELLAS PAYROLL, PAYABLES AND DOES THE FINANCIAL REPORTING. UNITE PINELLAS IS INCLUDED IN UWS'S BOOKS, HOWEVER ACTS COMPLETELY INDEPENDENT FROM UWS. TIMOTHY DUTTON'S OFFICIAL TITLE IS CEO OF UNITE PINELLAS AND HE REPORTS TO THE CEO'S OF THE 3 ORGANIZATIONS. SINCE UWS PROCESSES THE PAYROLL FOR UNITE PINELLAS, TIMOTHY DUTTON'S COMPENSATION IS REPORTED ON UWS'S RETURN ALTHOUGH THE MAJORITY OF IT IS REIMBURSED BY FHSP AND JWB. UNITE PINELLAS DISCONTINUED IN APRIL 2021.

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

CHANGE IN VALUE OF SPLIT-INTEREST AGREEMENTS	972.
PROVISION FOR UNCOLLECTIBLE PLEDGES	-1,526,720.
CHANGE IN CSV OF LIFE INSURANCE	10,671.
TOTAL TO FORM 990, PART XI, LINE 9	-1,515,077.

FORM 990, PART XII, LINE 2C:

THE ORGANIZATION'S AUDIT AND ETHICS COMMITTEE (THE COMMITTEE) IS

Name of the organization UNITED WAY SUNCOAST, INC.	Employer identification number 59-3725701
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RESPONSIBLE FOR ASSISTING THE BOARD OF DIRECTORS IN FULFILLING ITS  
OVERSIGHT RESPONSIBILITIES. AMONG THE RESPONSIBILITIES OF THE COMMITTEE  
IS THE OVERSIGHT OF THE INTEGRITY OF THE ORGANIZATION'S FINANCIAL  
ACCOUNTING PROCESSES AND SYSTEMS OF INTERNAL CONTROLS REGARDING  
FINANCE, ACCOUNTING AND USE OF ASSETS; THE INDEPENDENCE AND PERFORMANCE  
OF THE INDEPENDENT AUDITORS AND STAFF WITH FINANCE RESPONSIBILITIES;  
AND THE AUDITOR SELECTION PROCESS.

IN RELATION TO THE ANNUAL AUDIT, THE COMMITTEE:

- MEETS IN EXECUTIVE SESSION WITH THE INDEPENDENT AUDITORS
- OBTAINS A FORMAL STATEMENT FROM THE AUDITORS ANNUALLY REGARDING THEIR  
INDEPENDENCE
- OBTAINS A REPORT ANNUALLY REGARDING THE AUDITORS' QUALITY CONTROL  
PROCEDURES AND ANY REPORT ISSUED AS A RESULT OF A QUALITY CONTROL  
REVIEW OF THE AUDITORS
- OBTAINS AND REVIEWS ANY SIGNIFICANT CORRECTING AUDIT ADJUSTMENTS OR  
PASSED CORRECTING AUDIT ADJUSTMENTS
- REVIEWS THE DISPOSITION OF ANY MANAGEMENT LETTER COMMENTS, INTERNAL  
CONTROL AND/OR FRAUD RELATED MATTERS THAT ARISE DURING THE COURSE OF  
THE ANNUAL AUDIT
- PRE-APPROVES ALL NON-AUDIT SERVICES (OTHER THAN 990 AND 5500  
PREPARATION)
- REVIEWS AND DISCUSSES WITH MANAGEMENT AND THE INDEPENDENT AUDITOR ALL  
CRITICAL ACCOUNTING POLICIES
- REQUIRES THE INDEPENDENT AUDITING FIRM TO ROTATE AUDIT MANAGER EVERY  
3-5 YEARS
- REVIEWS ANNUALLY THE FORM 990 PRIOR TO FILING AND ENSURES THE CEO AND  
COO HAVE CERTIFIED THE CONTENTS OF THE FORM



Name of the organization

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-PROVIDES AN AVENUE OF COMMUNICATION AMONG THE ORGANIZATION'S  
INDEPENDENT AUDITORS, MANAGEMENT, STAFF, AND THE BOARD OF DIRECTORS

Multiple horizontal lines for additional text entry.

**SCHEDULE R  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Related Organizations and Unrelated Partnerships**

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990.

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

OMB No. 1545-0047

**2020**

Open to Public Inspection

Name of the organization **UNITED WAY SUNCOAST, INC.** Employer identification number **59-3725701**

**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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
UNITED WAY FOUNDATION OF MANATEE COUNTY - 65-0836972, 5201 W KENNEDY BLVD SUITE 600, TAMPA, FL 33609	INCREASE AWARENESS OF UNITED WAY SUNCOAST, INC.	FLORIDA	501(C)(3)	LINE 12A, I			X

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproportionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No
AN IRREVOCABLE TRUST C/O RAYMOND JAMES TRUST CO-880 CARILLON PKWY ST PETERSBURG, FL 33716	CHARITABLE REMAINDER UNITRUST	FL	N/A	TRUST	N/A	N/A	N/A		X

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

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

**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?

	Yes	No
<b>a</b> Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity .....		X
<b>b</b> Gift, grant, or capital contribution to related organization(s) .....		X
<b>c</b> Gift, grant, or capital contribution from related organization(s) .....		X
<b>d</b> Loans or loan guarantees to or for related organization(s) .....		X
<b>e</b> Loans or loan guarantees by related organization(s) .....		X
<b>f</b> Dividends from related organization(s) .....		X
<b>g</b> Sale of assets to related organization(s) .....		X
<b>h</b> Purchase of assets from related organization(s) .....		X
<b>i</b> Exchange of assets with related organization(s) .....		X
<b>j</b> Lease of facilities, equipment, or other assets to related organization(s) .....		X
<b>k</b> Lease of facilities, equipment, or other assets from related organization(s) .....		X
<b>l</b> Performance of services or membership or fundraising solicitations for related organization(s) .....		X
<b>m</b> Performance of services or membership or fundraising solicitations by related organization(s) .....		X
<b>n</b> Sharing of facilities, equipment, mailing lists, or other assets with related organization(s) .....	X	
<b>o</b> Sharing of paid employees with related organization(s) .....	X	
<b>p</b> Reimbursement paid to related organization(s) for expenses .....		X
<b>q</b> Reimbursement paid by related organization(s) for expenses .....		X
<b>r</b> Other transfer of cash or property to related organization(s) .....		X
<b>s</b> Other transfer of cash or property from related organization(s) .....		X

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

	(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				





**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Financial Statements**

**June 30, 2021 and 2020  
(With Independent Auditors' Report Thereon)**

# UNITED WAY SUNCOAST, INC. AND AFFILIATE

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**UNITED WAY SUNCOAST, INC.**  
**Management Certification**  
**Year Ended June 30, 2021**

I hereby certify that:

1. I have read the audited financial statements of United Way Suncoast, Inc. for the year ended June 30, 2021.
2. Based on my knowledge, the financial statements of United Way Suncoast, Inc. for the period ended June 30, 2021, do not contain any misstatement of a material fact or omission of a material fact that would make the statements misleading.
3. Based on my knowledge, the financial statements and other financial information included in this report fairly present, in all material respects, the financial condition, results of operations and cash flows of United Way Suncoast, Inc. as of, and for the period ended, June 30, 2021.



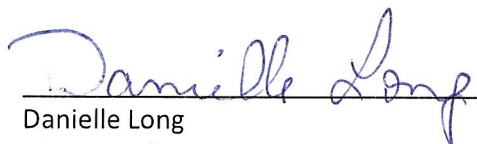
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Jessica Muroff  
Chief Executive Officer

10/22/2021

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Date



---

Danielle Long  
Vice President, Finance

10/22/2021

---

Date



## **Independent Auditors' Report**

Board of Directors  
United Way Suncoast, Inc. and Affiliate:

### **Report on the Combined Financial Statements**

We have audited the accompanying combined financial statements of United Way Suncoast, Inc. and Affiliate (collectively, "United Way"), which comprise the combined statements of financial position as of June 30, 2021 and 2020, and the related combined statements of activities, cash flows and functional expenses for the years then ended and the related notes to the combined financial statements.

### **Management's Responsibility for the Combined Financial Statements**

Management is responsible for the preparation and fair presentation of these combined financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of combined financial statements that are free from material misstatement, whether due to fraud or error.

### **Auditors' Responsibility**

Our responsibility is to express an opinion on these combined financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the combined financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the combined financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the combined financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the combined financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the combined financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

## **Opinion**

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of United Way Suncoast, Inc. and Affiliate as of June 30, 2021 and 2020, and the changes in their net assets, and their cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

*Mayer Hoffman McCann P.C.*

October 21, 2021  
St. Petersburg, Florida

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statements of Financial Position**

**June 30, 2021 and 2020**

<b>Assets</b>	<b>2021</b>	<b>2020</b>
Cash and cash equivalents	\$ 23,808,798	7,331,985
Pledges receivable, less allowance for uncollectible pledges of approximately \$1,406,000 and \$1,237,000 in 2021 and 2020, respectively	7,025,870	5,302,925
Accrued interest	32,783	68,372
Accounts receivable	253,333	258,658
Accrued bequests	-	33,333
Prepaid expenses	84,159	123,780
Community Foundation investments	7,039,687	5,617,242
Investments	29,108,382	23,861,204
Receivable under remainder trusts and other	161,514	222,441
Gifted facility	46,186	61,874
Property and equipment, net	1,603,235	1,574,649
Other	85,618	74,947
	<u>\$ 69,249,565</u>	<u>44,531,410</u>
<b>Total assets</b>	<b>\$ 69,249,565</b>	<b>44,531,410</b>
<b>Liabilities and Net Assets</b>		
Allocations and designations payable	\$ 7,591,109	6,785,870
Other liabilities	1,512,193	1,557,809
Annuities payable	182,156	237,476
Obligation under remainder trust agreement	51,473	56,801
Deferred lease incentive	49,196	48,608
Capital lease obligations	174,921	30,710
Federal loan payable	-	1,030,500
	<u>9,561,048</u>	<u>9,747,774</u>
<b>Total liabilities</b>	<b>9,561,048</b>	<b>9,747,774</b>
Net assets:		
Without donor restrictions:		
Operating reserves	4,901,918	4,575,942
Disaster relief reserves	1,219,925	1,219,925
Net investment in property and equipment	968,233	1,075,703
Board-designated for endowment	20,260,793	16,390,591
Board-designated for future allocations	85,350	85,350
Transformational community impact	20,000,000	-
Undesignated	121,039	1,386,129
	<u>47,557,258</u>	<u>24,733,640</u>
With donor restrictions	<u>12,131,259</u>	<u>10,049,996</u>
<b>Total net assets</b>	<b>59,688,517</b>	<b>34,783,636</b>
<b>Total liabilities and net assets</b>	<b>\$ 69,249,565</b>	<b>44,531,410</b>

See accompanying independent auditors' report and notes to combined financial statements.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statement of Activities**

**For the Year Ended June 30, 2021  
(With Comparative Totals for 2020)**

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>	
			<u>2021</u>	<u>2020</u>
Gross campaign contributions	\$ 34,296,467	2,160,513	36,456,980	17,930,832
Donor designations	<u>(1,702,646)</u>	<u>-</u>	<u>(1,702,646)</u>	<u>(1,841,456)</u>
Undesignated campaign contributions	32,593,821	2,160,513	34,754,334	16,089,376
Contributions recognized in a prior period	<u>(144,034)</u>	<u>-</u>	<u>(144,034)</u>	<u>(83,387)</u>
Undesignated campaign contributions	\$ <u>32,449,787</u>	<u>2,160,513</u>	<u>34,610,300</u>	<u>16,005,989</u>
Public support and revenue:				
Public support:				
Contributions	\$ 32,449,787	2,160,513	34,610,300	16,005,989
Provision for uncollectible pledges	<u>(1,526,720)</u>	<u>-</u>	<u>(1,526,720)</u>	<u>(1,168,828)</u>
Annual campaign, net of uncollectible pledges	30,923,067	2,160,513	33,083,580	14,837,161
Bequests and trusts	<u>61,311</u>	<u>10,671</u>	<u>71,982</u>	<u>76,234</u>
Total public support	30,984,378	2,171,184	33,155,562	14,913,395
Revenue:				
Program revenues	1,431,554	495	1,432,049	1,056,951
Service fee income	136,501	-	136,501	179,954
Investment return	5,025,386	1,771,953	6,797,339	1,190,751
Miscellaneous income	<u>91,854</u>	<u>-</u>	<u>91,854</u>	<u>172,222</u>
Total revenue	6,685,295	1,772,448	8,457,743	2,599,878
Net assets released from restrictions	<u>1,903,433</u>	<u>(1,903,433)</u>	<u>-</u>	<u>-</u>
Total public support and revenue	39,573,106	2,040,199	41,613,305	17,513,273
Expenses:				
Program services:				
Gross funds awarded/distributed	10,831,400	-	10,831,400	11,413,261
Less donor designations	<u>(1,702,646)</u>	<u>-</u>	<u>(1,702,646)</u>	<u>(1,841,456)</u>
Net funds awarded/distributed to agencies	9,128,754	-	9,128,754	9,571,805
Program services	<u>4,252,472</u>	<u>-</u>	<u>4,252,472</u>	<u>4,100,341</u>
Total program services	13,381,226	-	13,381,226	13,672,146
Supporting services:				
Fundraising	2,116,454	-	2,116,454	2,099,016
Administration	<u>2,279,397</u>	<u>-</u>	<u>2,279,397</u>	<u>2,181,945</u>
Total supporting services	4,395,851	-	4,395,851	4,280,961
Total expenses	<u>17,777,077</u>	<u>-</u>	<u>17,777,077</u>	<u>17,953,107</u>
Change in net assets before other changes	21,796,029	2,040,199	23,836,228	(439,834)
Other changes:				
Change in value of split-interest agreements	(40,092)	41,064	972	14,351
Gain on forgiveness of Paycheck Protection Program loan	1,030,500	-	1,030,500	-
Gain on disposal of assets	<u>37,181</u>	<u>-</u>	<u>37,181</u>	<u>253,881</u>
Change in net assets	22,823,618	2,081,263	24,904,881	(171,602)
Net assets, beginning of year	<u>24,733,640</u>	<u>10,049,996</u>	<u>34,783,636</u>	<u>34,955,238</u>
Net assets, end of year	\$ <u>47,557,258</u>	<u>12,131,259</u>	<u>59,688,517</u>	<u>34,783,636</u>

See accompanying independent auditors' report and notes to combined financial statements.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statement of Activities**

**For the Year Ended June 30, 2020**

	<u>Without Donor Restrictions</u>	<u>With Donor Restrictions</u>	<u>Total</u>
Gross campaign contributions	\$ 15,300,543	2,630,289	17,930,832
Donor designations	<u>(1,841,456)</u>	<u>-</u>	<u>(1,841,456)</u>
Undesignated campaign contributions	13,459,087	2,630,289	16,089,376
Contributions recognized in a prior period	<u>(83,387)</u>	<u>-</u>	<u>(83,387)</u>
Undesignated campaign contributions	\$ <u>13,375,700</u>	<u>2,630,289</u>	<u>16,005,989</u>
Public support and revenue:			
Public support:			
Contributions	\$ 13,375,700	2,630,289	16,005,989
Provision for uncollectible pledges	<u>(1,168,828)</u>	<u>-</u>	<u>(1,168,828)</u>
Annual campaign, net of uncollectible pledges	12,206,872	2,630,289	14,837,161
Bequests and trusts	<u>69,110</u>	<u>7,124</u>	<u>76,234</u>
Total public support	12,275,982	2,637,413	14,913,395
Revenue:			
Program revenues	1,055,394	1,557	1,056,951
Service fee income	179,954	-	179,954
Investment return	899,002	291,749	1,190,751
Miscellaneous income	<u>172,222</u>	<u>-</u>	<u>172,222</u>
Total revenue	2,306,572	293,306	2,599,878
Net assets released from restrictions	<u>3,356,657</u>	<u>(3,356,657)</u>	<u>-</u>
Total public support and revenue	17,939,211	(425,938)	17,513,273
Expenses:			
Program services:			
Gross funds awarded/distributed	11,413,261	-	11,413,261
Less donor designations	<u>(1,841,456)</u>	<u>-</u>	<u>(1,841,456)</u>
Net funds awarded/distributed to agencies	9,571,805	-	9,571,805
Program services	<u>4,100,341</u>	<u>-</u>	<u>4,100,341</u>
Total program services	13,672,146	-	13,672,146
Supporting services:			
Fundraising	2,099,016	-	2,099,016
Administration	<u>2,181,945</u>	<u>-</u>	<u>2,181,945</u>
Total supporting services	4,280,961	-	4,280,961
Total expenses	<u>17,953,107</u>	<u>-</u>	<u>17,953,107</u>
Change in net assets before other changes	(13,896)	(425,938)	(439,834)
Other changes:			
Change in value of split-interest agreements	(35,964)	50,315	14,351
Gain on sale of building	<u>253,881</u>	<u>-</u>	<u>253,881</u>
Change in net assets	204,021	(375,623)	(171,602)
Net assets, beginning of year	<u>24,529,619</u>	<u>10,425,619</u>	<u>34,955,238</u>
Net assets, end of year	\$ <u>24,733,640</u>	<u>10,049,996</u>	<u>34,783,636</u>

See accompanying independent auditors' report and notes to combined financial statements.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statements of Cash Flows**

**For the Years Ended June 30, 2021 and 2020**

	<u>2021</u>	<u>2020</u>
Cash flows from operating activities:		
Change in net assets	\$ 24,904,881	(171,602)
Adjustments to reconcile change in net assets to net cash provided by operating activities:		
Depreciation and amortization expense	140,148	148,708
Provision for uncollectible pledges	1,526,720	1,168,828
Realized and unrealized gains on investments	(6,448,840)	(702,468)
Forgiveness of Paycheck Protection Program loan	(1,030,500)	-
Gain on disposal of assets	(37,181)	(253,881)
Change in value of split-interest agreements	(972)	(14,351)
Decrease in gifted facility	15,688	14,626
Increase in pledges receivable	(3,249,665)	(1,397,099)
Decrease in other receivables	132,947	252,332
Decrease (increase) in prepaid expenses and other assets	28,950	(20,733)
Increase in allocations and designations payable	805,239	2,234,179
Increase (decrease) in other liabilities	<u>(45,028)</u>	<u>532,808</u>
Net cash provided by operating activities	16,742,387	1,791,347
Cash flows from investing activities:		
Property and equipment purchases	(7,753)	(98,230)
Proceeds from sale of building	55,467	256,396
Purchases of investment securities	(5,779,058)	(3,024,047)
Proceeds from sale of investment securities	<u>5,558,275</u>	<u>2,793,596</u>
Net cash used in investing activities	(173,069)	(72,285)
Cash flows from financing activities:		
Principal payments on capital lease obligations	(35,056)	(14,156)
Principal payments on gift annuity obligations	(42,687)	(46,012)
Principal payments on obligation under remainder trust	(14,762)	(12,466)
Proceeds received from Paycheck Protection Program loan	-	1,030,500
Net cash (used in) provided by financing activities	<u>(92,505)</u>	<u>957,866</u>
Net increase in cash and cash equivalents	16,476,813	2,676,928
Cash and cash equivalents, beginning of year	<u>7,331,985</u>	<u>4,655,057</u>
Cash and cash equivalents, end of year	<u>\$ 23,808,798</u>	<u>7,331,985</u>
Supplemental cash flow information:		
Cash paid for interest	<u>\$ 16,672</u>	<u>7,207</u>

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statement of Functional Expenses**

**For the Year Ended June 30, 2021  
(With Comparative Totals for 2020)**

	Program Services					Supporting Services			Total	
	Education	Place-Based Initiatives	Financial Stability	Community Support Services	Total Programs	Fundraising	Administration	Total Supporting Services	2021	2020
Allocations/awards	\$ 4,540,473	396,545	3,377,863	813,873	9,128,754	1,702,646	-	1,702,646	10,831,400	11,413,261
Less donor designations	-	-	-	-	-	(1,702,646)	-	(1,702,646)	(1,702,646)	(1,841,456)
	4,540,473	396,545	3,377,863	813,873	9,128,754	-	-	-	9,128,754	9,571,805
Salaries	437,658	457,492	434,888	1,062,673	2,392,711	1,297,777	942,962	2,240,739	4,633,450	4,497,301
Payroll taxes/PEO fees	43,810	46,744	40,953	109,130	240,637	133,822	55,450	189,272	429,909	445,663
401(k) and pension	10,849	13,325	9,594	18,034	51,802	31,180	19,432	50,612	102,414	119,650
Other employee benefits	51,762	63,195	45,090	124,755	284,802	144,638	57,607	202,245	487,047	469,116
	544,079	580,756	530,525	1,314,592	2,969,952	1,607,417	1,075,451	2,682,868	5,652,820	5,531,730
Legal fees	4,456	354	1,374	4,027	10,211	1,139	11,070	12,209	22,420	3,403
Accounting and audit fees	5,068	6,028	8,844	11,538	31,478	16,810	16,332	33,142	64,620	69,000
Professional and consulting fees	33,330	-	671	63,001	97,002	17,550	208,291	225,841	322,843	208,347
Advertising and promotion	802	-	525	2,500	3,827	1,801	392,412	394,213	398,040	332,232
Office expense	5,744	19,607	7,581	12,739	45,671	17,743	65,694	83,437	129,108	127,963
Information technology	40,461	53,687	123,118	104,105	321,371	116,792	145,485	262,277	583,648	463,563
Occupancy	50,322	86,993	100,105	124,062	361,482	188,118	140,365	328,483	689,965	755,717
Travel	952	88	1,150	2,902	5,092	2,618	2,438	5,056	10,148	66,454
Conferences, conventions and meetings	151	175	2,842	204	3,372	1,333	35,027	36,360	39,732	64,261
Interest	-	59	214	181	454	266	15,952	16,218	16,672	7,207
UWW and UWFL dues	23,172	13,009	36,104	52,687	124,972	76,575	58,618	135,193	260,165	239,540
Depreciation and amortization	16,776	17,800	18,087	22,494	75,157	33,611	31,380	64,991	140,148	148,708
Insurance	5,021	3,915	6,282	9,854	25,072	13,266	9,421	22,687	47,759	45,870
Printing	626	-	2,410	5	3,041	8,413	5,389	13,802	16,843	37,470
Program and campaign supplies	96,632	3,600	10,520	31,277	142,029	3,843	311	4,154	146,183	151,798
Memberships, sponsorships and registrations	459	-	2,885	28,408	31,752	8,714	39,407	48,121	79,873	88,312
Other expenses	-	-	-	537	537	445	26,354	26,799	27,336	39,727
	283,972	205,315	322,712	470,521	1,282,520	509,037	1,203,946	1,712,983	2,995,503	2,849,572
Total expenses	\$ 5,368,524	1,182,616	4,231,100	2,598,986	13,381,226	2,116,454	2,279,397	4,395,851	17,777,077	17,953,107

See accompanying independent auditors' report and notes to combined financial statements.



**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Combined Statement of Functional Expenses**

**For the Year Ended June 30, 2020**

	Program Services				Supporting Services				Total
	Education	Place-Based Initiatives	Financial Stability	Community Support Services	Total Programs	Fundraising	Administration	Total Supporting Services	
Allocations/awards	\$ 4,335,639	392,813	2,887,919	3,796,890	11,413,261	-	-	-	11,413,261
Less donor designations	-	-	-	(1,841,456)	(1,841,456)	-	-	-	(1,841,456)
	4,335,639	392,813	2,887,919	1,955,434	9,571,805	-	-	-	9,571,805
Salaries	440,295	421,481	460,835	968,621	2,291,232	1,261,455	944,614	2,206,069	4,497,301
Payroll taxes/PEO fees	43,277	42,655	46,351	99,298	231,581	134,163	79,919	214,082	445,663
401(k) and pension	11,098	10,808	11,983	25,311	59,200	41,583	18,867	60,450	119,650
Other employee benefits	49,353	54,560	56,055	97,843	257,811	136,622	74,683	211,305	469,116
	544,023	529,504	575,224	1,191,073	2,839,824	1,573,823	1,118,083	2,691,906	5,531,730
Legal fees	1,995	-	-	595	2,590	-	813	813	3,403
Accounting and audit fees	5,068	6,028	8,844	11,538	31,478	16,810	20,712	37,522	69,000
Professional and consulting fees	-	-	1,402	70,277	71,679	2,500	134,168	136,668	208,347
Advertising and promotion	775	-	3,294	775	4,844	3,858	323,530	327,388	332,232
Office expense	5,296	27,586	9,266	17,092	59,240	18,637	50,086	68,723	127,963
Information technology	35,795	57,487	66,101	88,076	247,459	104,201	111,903	216,104	463,563
Occupancy	47,963	67,790	107,593	154,217	377,563	201,858	176,296	378,154	755,717
Travel	4,933	2,055	12,799	26,116	45,903	17,443	3,108	20,551	66,454
Conferences, conventions and meetings	3,328	2,798	1,616	3,476	11,218	12,675	40,368	53,043	64,261
Interest	-	79	288	242	609	357	6,241	6,598	7,207
UWW and UWFL dues	21,306	12,218	33,273	48,446	115,243	70,414	53,883	124,297	239,540
Depreciation and amortization	18,467	24,510	17,120	25,619	85,716	38,188	24,804	62,992	148,708
Insurance	4,831	3,239	5,135	8,788	21,993	11,455	12,422	23,877	45,870
Printing	1,738	3,020	8,675	1,816	15,249	19,727	2,494	22,221	37,470
Program and campaign supplies	75,176	14,457	9,687	49,844	149,164	2,634	-	2,634	151,798
Memberships, sponsorships and registrations	197	2,165	6,389	11,688	20,439	4,256	63,617	67,873	88,312
Other expenses	112	-	-	18	130	180	39,417	39,597	39,727
	226,980	223,432	291,482	518,623	1,260,517	525,193	1,063,862	1,589,055	2,849,572
Total expenses	\$ 5,106,642	1,145,749	3,754,625	3,665,130	13,672,146	2,099,016	2,181,945	4,280,961	17,953,107

See accompanying independent auditors' report and notes to combined financial statements.

# UNITED WAY SUNCOAST, INC. AND AFFILIATE

## Notes to Combined Financial Statements

June 30, 2021 and 2020

### (1) Nature of Activities and Summary of Significant Accounting Policies

#### (a) Nature of Activities

The United Way Suncoast, Inc. (the “Organization” or “United Way”) is a not-for-profit organization governed by a volunteer board of directors. United Way’s mission is to provide leadership that improves lives and creates lasting community change by mobilizing the caring people of our communities to give, advocate and volunteer. United Way works with community partners, including a network of partner agencies, businesses, school systems, governments, and other funding sources to provide pathways to education and financial stability that give every child and adult the freedom to rise.

United Way leads collective impact programs that help change the story for individuals and families today and build a solid foundation for future success through a committed focus on:

#### *Education*

With targeted, holistic intervention in and out of school, children can overcome barriers and catch up to their less challenged peers. United Way provides that support for children 0 - 12 years old through programs that activate parent involvement, help more children attend enriched out-of-school programs, combat summer learning loss, increase school attendance, provide caregiver education, engage volunteer reading tutors and more. United Way works to help young people ages 13 - 17 graduate from high school ready to pursue college or career training that enables family-sustaining employment. This is accomplished through programs and services that create supportive learning environments, identify and intervene with at-risk students, connect students to careers, improve attendance and increase parental involvement so young people successfully complete high school.

#### *Place-Based Initiatives*

In order to strategically bring needed services to areas of high need, United Way developed neighborhood-based community initiatives to deliver coordinated help to track and improve performance. Through collaboration and involvement with these communities, at the Resource Centers United Way operates, the United Way is improving and empowering neighborhoods to create success and change. Resource centers are operated in the following areas: Sulphur Springs (Tampa), North Greenwood (Clearwater), Campbell Park (South St. Petersburg), and United Way Suncoast Reading Rooms in Manatee County.

#### *Financial Stability*

United Way helps adults develop and build the financial and employability skills they need to make informed financial decisions to achieve long-term financial stability. From budgeting to employment skills, to programs that help them save to buy a home or start a business, United Way supports individuals and families. We focus specifically on ALICE families, those hard-working parents and children that represent 43 percent of our service area and stand just one unexpected expense from dire circumstances.

UNITED WAY SUNCOAST, INC. AND AFFILIATE

Notes to Combined Financial Statements - Continued

(1) **Nature of Activities and Summary of Significant Accounting Policies - Continued**

(a) **Nature of Activities - Continued**

*Community Support Services*

United Way supports a network of services to help individuals/families in crisis move past immediate need to participate fully in United Way's Collective Impact priorities. Programs include health, nutrition/food assistance, shelter and safety interventions.

(b) **Accounting Method**

The combined financial statements of the Organization have been prepared on the accrual basis. Net assets and revenues, expenses, gains and losses are classified based on the existence or absence of donor-imposed restrictions. In the accompanying combined financial statements, net assets that have similar characteristics have been combined into similar categories as follows:

- (i) *Net assets without donor restrictions*: Net assets that are not subject to donor-imposed stipulations. Net assets without donor restrictions may be designated for specific purposes by action of the Board of Directors or may otherwise be limited by contractual agreements with outside parties.

Designations of net assets without donor restrictions are summarized as follows:

*Operating reserves* are used to fund special projects, emergencies and portions of the operating budget as approved by the Board of Directors in the budget process. The funded operating reserve goal is to achieve and maintain between three and six months of program funding and operating costs.

*Disaster relief reserves* are available for use in the event a major disaster strikes the Tampa Bay community. The funded disaster relief reserve goal is to maintain \$1 million.

*Net investment in property and equipment* is equal to the net book value of property and equipment less related liabilities.

*Designated for endowment* is the level of investments designated by the Board to earn interest and appreciation with the long term goal of growth.

*Designated for future allocations* are funds made available for future allocations to partner and other agencies for educational programs in the Manatee area.

*Transitional community impact* is made available to fund strategic initiatives and priorities of the region served by United Way Suncoast and aligned to support the Board approved Organization strategic plan.

# UNITED WAY SUNCOAST, INC. AND AFFILIATE

## Notes to Combined Financial Statements - Continued

### (1) Nature of Activities and Summary of Significant Accounting Policies - Continued

#### (b) Accounting Method - Continued

- (ii) *Net assets with donor restrictions*: Net assets with donor restrictions whose use by the Organization is subject to donor-imposed stipulations that can be fulfilled by actions of the Organization pursuant to those stipulations or that expire by the passage of time.

Some net assets with donor restrictions include a stipulation that assets provided be maintained in perpetuity while permitting the Organization to spend the income generated by the assets for specific programs under certain named endowments as well as earnings without donor restrictions under various general endowments as more fully described in Note 9.

#### (c) Principles of Combination

The combined financial statements include the financial statements of United Way Suncoast, Inc. and United Way Foundation of Manatee (collectively, “United Way” or the “Organization”). All significant inter-organizational balances and transactions have been eliminated in the combination.

#### (d) Activities

Public support consists primarily of pledges promised and of payments on pledges made during annual fund-raising campaigns. All public support is considered to be available for unrestricted use unless specifically restricted by the donor. Pledge income is recognized when unconditional pledge commitments are received and allowances are provided for amounts estimated to be uncollectible.

Allocations expense is recognized when the commitment is made to pay allocations to participating agencies. The Organization’s Board of Directors approves allocations for commitment two times a year.

#### (e) Functional Expense Allocations

The costs of providing the Organization’s various programs have been summarized on a functional basis in the combined statement of functional expenses. Expenses directly attributable to a specific functional area of the Organization are reported as direct expenses of those functional areas while indirect costs that benefit multiple functional areas have been allocated among the functional areas based on time spent by employees on each functional area or based on the Organization’s square footage analysis for all indirect occupancy-related expenses.

#### (f) Cash and Cash Equivalents

Cash and cash equivalents include short-term investments with original maturities of three months or less.

## UNITED WAY SUNCOAST, INC. AND AFFILIATE

### Notes to Combined Financial Statements - Continued

#### (1) Nature of Activities and Summary of Significant Accounting Policies - Continued

##### (g) Investments

Investments in equity securities with readily determinable fair value and all investments in debt securities are reported at fair value in the combined statement of financial position. Investment income (including realized and unrealized gains and losses on investments, interest and dividends) is reflected in the combined statement of activities. Purchases and sales of investments are recorded on the trade date. The cost of investments sold is determined by the specific identification method.

##### (h) Contributions and Allowance for Uncollectible Pledges

Contributions received, including unconditional promises to give, are recorded as with or without donor restrictions in the combined statement of activities, depending on the existence or nature of any donor restrictions. Contributions that are restricted by the donor are reported as increases in net assets with donor restrictions. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions.

Conditional contributions are recorded as revenue when such amounts become unconditional which generally involves the meeting of a barrier to entitlement. This can include items like meeting a matching provision, incurring specified allowable expenses in accordance with a framework of allowable costs or other barriers.

A portion of the Organization's revenue is derived from cost-reimbursable contracts and grants, which are conditioned upon certain performance requirements and the incurrence of allowable qualifying expenses. Amounts received are recognized as revenue when the Organization has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as other liabilities in the combined statement of financial position. The Organization received cost-reimbursable grants of approximately \$80,863 that have not been recognized at June 30, 2021 because qualifying expenditures have not yet been incurred, with advance payments of \$466,514 recognized as a component of other liabilities in the combined statement of financial position.

The allowance for uncollectible pledges is computed based upon a three year historical average of campaign collections adjusted by management estimates of current economic factors, applied to individual campaigns, including donor designations. Management's estimate of the allowance is subject to a significant degree of uncertainty and actual collections experience may differ from projected campaign results.

##### (i) Going Concern Evaluation

On an annual basis, as required by Accounting Standards Codification ("ASC") Topic 205, *Presentation of Financial Statements - Going Concern*, the Organization performs an evaluation to determine whether there are conditions or events (known and reasonably knowable), considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern within one year after the date that the combined financial statements are available to be issued. Management's assessment did not indicate that substantial doubt is raised about the ability to remain a going concern for one year from the date the combined financial statements were available for issuance.

UNITED WAY SUNCOAST, INC. AND AFFILIATE

Notes to Combined Financial Statements - Continued

(1) **Nature of Activities and Summary of Significant Accounting Policies - Continued**

(j) **Designations**

All pledges designated to 501(c)(3) agencies are sent directly to those agencies or to federations for future distribution to member agencies.

(k) **Property and Equipment**

Property and equipment are recorded at cost or, in the case of donated items used in operations, at fair value on the date received. The Organization capitalizes all purchases and donated items with a cost or fair value in excess of \$1,000.

Depreciation of property and equipment is provided for by the use of the straight-line method. The estimated useful lives range from fifteen to forty years for buildings and improvements and three to ten years for furniture and equipment. Leasehold improvements are amortized over the lesser of their estimated useful lives or the related lease term. Property and equipment and the allowance for depreciation are relieved upon retirement or sale and the related gain or loss is included in the combined statements of activities.

(l) **Income Taxes**

The Organization is exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code and from state income taxes under the provisions of the Florida Statutes. The Internal Revenue Code provides for taxation of unrelated business income under certain circumstances. The Organization reports no unrelated business taxable income; however, such status is subject to final determination upon examination of the related income tax returns by the appropriate taxing authorities. The Organization has adopted the provisions of ASC Topic 740 relating to *Accounting for Uncertainty in Income Taxes* and does not believe it has any material income tax exposure relating to uncertain tax positions. The income tax filings for United Way Suncoast, Inc., United Way of Manatee County, Inc. and United Way Foundation of Manatee County for the year ended June 30, 2018 and thereafter remain subject to examination.

(m) **Concentration of Credit Risk**

The Organization has no financial instruments which subject it to off-balance-sheet risk. Financial instruments, which potentially subject the Organization to concentrations of credit risk, consist principally of cash and cash equivalents, investments in debt securities and pledges receivable. The Organization maintains its cash balances with what management believes to be high-credit quality financial institutions. Management considers the credit-worthiness of issuers of debt securities as part of its overall investment evaluation and monitoring process. Credit risk related to pledges receivable is alleviated due to the large number of individual donors.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(1) Nature of Activities and Summary of Significant Accounting Policies - Continued**

**(n) Use of Estimates**

The preparation of combined financial statements in conformity with accounting principles generally accepted in the United States requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the combined financial statements. Estimates also affect the reported amounts of changes in net assets during the reporting period. Actual results could differ from those estimates.

**(o) Fair Value Measurements**

The Organization has adopted the provisions of ASC 820, *Fair Value Measurement*, which requires the use of a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value into three levels: quoted market prices that are observable for the assets or liabilities (Level 1); inputs other than quoted market prices that are observable for the asset or liability, either directly or indirectly (Level 2); and unobservable inputs for the asset or liability (Level 3).

**(2) Investments**

Investments, stated at fair value, consist of the following at June 30, 2021 and 2020:

	<u>2021</u>		<u>2020</u>	
	<u>Cost</u>	<u>Fair Value</u>	<u>Cost</u>	<u>Fair Value</u>
Cash, money market funds, and certificates of deposit	\$ 2,243,675	2,243,675	1,656,818	1,656,818
U.S. government and agency obligations	907,377	925,867	720,629	793,827
Mortgaged-backed securities	2,456,640	2,476,169	2,494,432	2,557,009
Corporate bonds	3,477,170	3,547,123	2,772,884	2,924,494
Bond mutual funds	3,212,723	3,376,065	2,500,728	2,714,480
Exchange traded funds	<u>11,226,157</u>	<u>16,539,483</u>	<u>12,056,181</u>	<u>13,214,576</u>
	<u>\$ 23,523,742</u>	<u>29,108,382</u>	<u>22,201,672</u>	<u>23,861,204</u>

The Organization's investments in corporate bonds are not concentrated in a single entity or in a few entities nor are there any specific industry concentrations. Investments include amounts which include donor restrictions for endowment purposes.

## UNITED WAY SUNCOAST, INC. AND AFFILIATE

### Notes to Combined Financial Statements - Continued

#### (2) Investments - Continued

Investment return consists of the following for the years ended June 30, 2021 and 2020:

	<u>2021</u>	<u>2020</u>
Interest and dividends	\$ 498,531	600,400
Realized and unrealized gains	<u>6,448,840</u>	<u>702,468</u>
	6,947,371	1,302,868
Less investment expenses	<u>(150,032)</u>	<u>(112,117)</u>
	<u>\$ 6,797,339</u>	<u>1,190,751</u>

Investment income includes earnings from certificates of deposit and from Community Foundation investments.

#### (3) Community Foundation Investments

In 1992, the Organization established a fund account with the Community Foundation of Tampa Bay, Inc. naming itself as the beneficiary. Under the terms of the fund agreement, the Community Foundation of Tampa Bay, Inc. has not been granted variance power over the funds. Distributions may be made from the fund with approval from the United Way Board of Directors. The Organization did not receive any distributions from the fund in fiscal 2021 or 2020. At June 30, 2021 and 2020, the balance of investments held by the Community Foundation of Tampa Bay, Inc. was \$1,769,610 and \$1,356,261, respectively. Net investment income for the years ended June 30, 2021 and 2020 was \$413,349 and \$44,194, respectively.

In 2019, the Board of Directors established an account at the Community Foundation of Manatee County by transferring the majority of the Foundation's investments totaling \$3,663,566. Under the terms of the agreement with the Community Foundation of Manatee County, these assets will be invested at the Community Foundation of Manatee County for a period of three years. At June 30, 2021 and 2020, the balance of investments held by the Community Foundation of Manatee County was \$5,270,077 and \$4,260,981, respectively. Net investment income for the years ended June 30, 2021 and 2020 was \$1,009,096 and \$84,042, respectively.



## UNITED WAY SUNCOAST, INC. AND AFFILIATE

### Notes to Combined Financial Statements - Continued

#### (4) Charitable Remainder Trusts

The Organization has been named as a remainder beneficiary under several charitable remainder trusts. Under one of the charitable remainder unitrust agreements, the Organization was also named the trustee. Under the terms of the trusts, quarterly distributions are paid to income beneficiaries over their lifetimes or over defined periods. Quarterly distributions range from actual earnings to fixed rates ranging from 6% to 7% of the fair value of the trust assets as of the beginning of each year. Upon the death of income beneficiaries and donors, the remaining assets are available for the Organization's use. The portion of the trust attributable to the present value of the future benefits to be received by the Organization is recorded in the combined statement of activities as a contribution with donor restrictions in the period the trust is established and the Organization is notified of its existence. Assets held under the charitable remainder trust are included with investments in the accompanying combined statement of financial position and are reported at their estimated fair value. Receivables under remainder trust agreements and the obligation under a remainder trust are also reported at their estimated fair values in the accompanying combined statement of financial position.

#### (5) Property and Equipment

Property and equipment at June 30, 2021 and 2020 consists of the following:

	<u>2021</u>	<u>2020</u>
Land	\$ 386,245	386,245
Buildings and improvements	1,332,835	1,332,835
Leasehold improvements	1,008,550	1,008,550
Furniture, fixtures and equipment	<u>1,423,893</u>	<u>1,308,873</u>
	4,151,523	4,036,503
Less accumulated depreciation	<u>(2,548,288)</u>	<u>(2,461,854)</u>
	<u>\$ 1,603,235</u>	<u>1,574,649</u>

For the years ended June 30, 2021 and 2020, depreciation and amortization expense was \$140,148 and \$148,708, respectively.

In 2006, the United Way of Manatee County, Inc. and the Manatee Chamber of Commerce, Inc. ("Chamber") conducted a joint fundraising campaign in an effort to raise capital to fund the construction of an office building to be jointly occupied and utilized by both nonprofit organizations under a Joint Venture Operating Agreement ("Agreement"). In November 2008, construction was completed and the McClure Center building was placed in service. The United Way is the fee simple title holder and owner of an undivided 50% interest, as a tenant in common of the property. There is a special warranty deed on the building which restricts the use of the building for a period of twenty-five years. This restriction requires that the building be fully occupied by the Chamber and/or United Way.

UNITED WAY SUNCOAST, INC. AND AFFILIATE

Notes to Combined Financial Statements - Continued

(5) **Property and Equipment - Continued**

The Agreement specifies with the exception of janitorial services and property and casualty insurance premiums, the costs and expenses associated with the operation and use of the building will be shared equally to the extent that such expenses are incurred on behalf of both parties. Janitorial services and property and casualty insurance premiums are allocated based on the square footage of the building occupied by each entity. United Way's share of facility operating costs was \$31,196 and \$37,903 for the years ended June 30, 2021 and 2020, respectively.

(6) **Gifted Facility**

The Organization leases land from the School Board of Hillsborough County at a rental rate of \$1 per year. In February 2019, the lease was extended to May 2024. Accordingly, the Organization has recorded a gifted facility contribution which represents the present value of the excess of the aggregate fair rental value of the land lease over below market rent payments due over the remaining term of the lease.

Recognition of the fair value of this lease as of and for the years ended June 30, 2021 and 2020 is summarized below:

Fair value of gifted facility at June 30, 2019	\$	76,500
Recognition of fair value of gifted land lease		1,557
Recognition of rent expense for the year ended June 30, 2020		<u>(16,183)</u>
Fair value of gifted facility at June 30, 2020		61,874
Recognition of fair value of gifted land lease		495
Recognition of rent expense for the year ended June 30, 2021		<u>(16,183)</u>
Fair value of gifted facility at June 30, 2021	\$	<u><u>46,186</u></u>

(7) **Annuities Payable**

The Organization is certified by the State of Florida to market and manage charitable gift annuity contracts. Under these contracts, a donor transfers assets to the Organization at the beginning of the contract and the Organization makes predetermined quarterly or semi-annual payments to the donor, or in certain cases donors' spouses, over their remaining lifetimes. Upon the donors' death, the remaining assets are available for the Organization's use. Annuities payable are stated at the actuarial present value of future cash flows expected to be paid to donors over their lifetimes. The discount rate used in computing the present value of annuities payable ranges from .46% to 1.21 % as of June 30, 2021 and from .18% to .49% as of June 30, 2020.

State law requires that the Organization maintain a reserve fund in connection with its gift annuity program. The required amount to be maintained in the fund is based on a multiple of the actuarial present value of the related annuity obligations.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(8) Net Assets With Donor Restrictions**

Net assets with donor restrictions at June 30, 2021 and 2020 consist of the following:

	<b>2021</b>	<b>2020</b>
Net assets subject to donor use restrictions:		
Future campaign pledges	\$ 288,521	144,034
Remainder trusts and other	247,132	297,388
Gifted facility:		
Sulphur Springs Resource Center	46,186	61,874
Program initiatives	1,956,868	1,453,107
	2,538,707	1,956,403
Net assets subject to time restrictions:		
Unappropriated endowment earnings	5,860,564	4,404,895
	5,860,564	4,404,895
Net assets to be held in perpetuity:		
Donor endowments	3,518,538	3,518,538
Charitable remainder unitrust	213,450	170,160
	\$ 12,131,259	10,049,996

At June 30, 2021 and 2020, donor endowments include \$2,201,507 of general endowments with no restrictions on the use of earnings and \$1,317,031 of named endowments which restrict the use of endowment earnings for specific purposes.

**(9) Endowment Funds**

The Organization's internally-controlled endowment net assets are comprised of investments held in various donor endowments, investments held under a charitable remainder trust agreement, and funds designated by the Board of Directors to function as endowments. 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.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(9) Endowment Funds - Continued**

*Interpretation of Relevant Law*

The Board of Directors of the Organization has interpreted the wishes of donors and state law as requiring the preservation of the fair value of the original gift as of the gift date of the donor-restricted endowment funds absent explicit donor stipulations to the contrary. As a result of this interpretation, the Organization classifies net assets restricted by the donor in perpetuity as (a) the original value of gifts donated to the endowment; (b) the original value of subsequent gifts to the endowment; and (c) accumulations to the endowment made in accordance with the direction of the applicable donor gift instrument at the time the accumulation is added to the fund. The Organization classifies investment earnings on endowments as a component of net assets with donor restrictions if not appropriated for expenditure in the period earned. Once investment earnings are appropriated for expenditure, the Organization reclassifies the amount appropriated as a component of net assets without donor restrictions.

*Investment Return Objectives, Risk Parameters and Strategies*

The Organization has adopted investment policies, approved by the Board of Directors. The policies stipulate that the endowment investments should be managed as a long-term goal designed to maximize the returns without exposure to undue risk. Whereas it is understood that fluctuating rates of return are characteristic of the securities markets, the greatest concern should be long-term appreciation of the assets and consistency of total portfolio returns. Recognizing that short-term market fluctuations may cause variations in the account performance, the Organization will pursue a strategy seeking to exceed a benchmark return of a target portfolio consisting of the following:

	<u>Cash and Equivalents</u>	<u>Fixed Income</u>	<u>Equities</u>
Operating reserves:			
Tampa area	9%	61%	30%
Sarasota area	7%	30%	63%
Named endowments	7%	30%	63%
Charitable gift annuities	15%	40%	45%
Charitable remainder trusts	7%	30%	63%

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(9) Endowment Funds - Continued**

***Spending Policy***

The Organization's spending policies allow for the distribution of assets for operating expenses as follows:

<u>Investment Class</u>	<u>Spending Policy</u>
Operating and capital reserves	5% annually of the average fair value of investments at March 31st of each of the previous three years
Endowment assets:	
General and board-designated named endowments	5% annually of the average fair value of investments at March 31st of each of the previous three years
Charitable gift annuity investments	Actuarially determined annuity payments due
Charitable remainder unitrust assets	6% of fair value of investments as of each January 1st

Endowment net asset composition by type of fund as of June 30, 2021 and 2020 follows:

	<u>Net Assets Without Donor Restrictions</u>	<u>Net Assets With Donor Restrictions</u>	<u>Total Endowment Net Assets</u>
June 30, 2021:			
Board-designated endowment funds	\$ 14,095,166	-	14,095,166
Charitable remainder unitrust	51,472	213,450	264,922
Donor-restricted endowment funds	<u>6,114,155</u>	<u>9,379,102</u>	<u>15,493,257</u>
	<u>\$ 20,260,793</u>	<u>9,592,552</u>	<u>29,853,345</u>
June 30, 2020:			
Board-designated endowment funds	\$ 12,002,473	-	12,002,473
Charitable remainder unitrust	56,801	170,160	226,961
Donor-restricted endowment funds	<u>4,331,317</u>	<u>7,923,433</u>	<u>12,254,750</u>
	<u>\$ 16,390,591</u>	<u>8,093,593</u>	<u>24,484,184</u>

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(9) Endowment Funds - Continued**

*Spending Policy - Continued*

Changes in endowment net assets for the years ended June 30, 2021 and 2020 are as follows:

	<u>Net Assets Without Donor Restrictions</u>	<u>Net Assets With Donor Restrictions</u>	<u>Total Endowment Net Assets</u>
Balance at July 1, 2019	\$ 15,848,985	8,256,024	24,105,009
Contributions	41,374	-	41,374
Net investment income	197,595	156,667	354,262
Net appreciation	302,637	144,602	447,239
Withdrawals	-	(463,700)	(463,700)
Balance at June 30, 2020	16,390,591	8,093,593	24,484,184
Contributions	57,999	-	57,999
Net investment income	595,449	112,700	708,149
Net appreciation	3,801,674	1,702,542	5,504,216
Withdrawals	(584,920)	(316,283)	(901,203)
Balance at June 30, 2021	<u>\$ 20,260,793</u>	<u>9,592,552</u>	<u>29,853,345</u>

**(10) Concentrations**

As stated previously, the Organization maintains its cash and cash equivalent balances with what management believes to be high credit quality financial institutions. The Organization's deposit balances exceeded federal deposit insurance limits by approximately \$3,462,000 and \$6,961,000 as of June 30, 2021 and 2020, respectively. At June 30, 2021, the Organization maintained approximately \$20 million in a money market mutual fund managed by a high credit quality financial institution which was considered to be a cash equivalent. The balance is not insured by the financial institution, federal deposit insurance, or any other government agency.

One donor accounted for approximately 58% of gross contribution revenue for the year ended June 30, 2021. No concentrations existed with respect to contribution revenue for the year ended June 30, 2020.

**(11) Contingencies**

The Organization is involved in various claims and legal actions arising in the ordinary course of operations. Management believes that any liability incurred in connection with these claims would be nominal in amount because the claims are without merit or would be covered under the Organization's insurance policies. In the opinion of management, no material liability exists with respect to these claims.

## UNITED WAY SUNCOAST, INC. AND AFFILIATE

### Notes to Combined Financial Statements - Continued

#### (12) Risks and Uncertainties

The novel coronavirus (“COVID-19”) spread rapidly across the world in the first quarter of 2020 and was declared a pandemic by the World Health Organization in March 2020. The government and private sector responses to contain its spread began to adversely affect the broader economy and business in general in March 2020 and those impacts will likely affect operations through the remainder of 2021, although such effects may vary significantly. The duration and extent of the pandemic and its effects over longer terms cannot be reasonably estimated as of the date the combined financial statements were available for issuance. The risks and uncertainties resulting from the pandemic that may affect the results of operating activities, cash flows and financial condition include the nature and duration of the curtailment of various program activities and the long-term effect on campaign contributions.

The pandemic has adversely affected global economic activity and greatly contributed to significant deterioration and instability in financial markets. As a result, there has been heightened market risk and the Organization’s investment portfolio has incurred significant volatility in fair value since March 2020. Because the values of the Organization’s individual investments have and will fluctuate in response to changing market conditions, the amount of losses that will be recognized in future periods, if any, and the related impact on the Organization’s liquidity cannot be determined at this time.

#### (13) Leases

The Organization leases office facilities and certain equipment under various operating leases. Rent expense was approximately \$655,000 and \$693,000 for the years ended June 30, 2021 and 2020, respectively.

The Organization was also obligated under two capital leases for office equipment that would have expired over the next two years. Effective December 2020, the Organization terminated the existing capital leases upon the execution of a new capital lease for replacement office equipment which expires in December 2026. The gross amount of office equipment and related accumulated amortization recorded under the capital leases as of June 30, 2021 were \$179,267 and \$17,927, respectively. The gross amount of office equipment and related accumulated amortization recorded under the capital leases as of June 30, 2020 were \$72,000 and \$48,000, respectively. Amortization of assets held under the capital leases is included in depreciation expense. Interest expense recorded under the capital leases for the years ended June 30, 2021 and 2020 was \$15,779 and \$6,008, respectively.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(13) Leases - Continued**

Future minimum lease payments required under operating leases that have initial or remaining noncancelable lease terms in excess of one year and the present value of minimum capital lease payments as of June 30, 2021 are as follows:

<u>Year Ending June 30,</u>	<u>Capital Leases</u>	<u>Operating Leases</u>	<u>Total</u>
2022	\$ 54,896	667,900	722,796
2023	54,896	591,000	645,896
2024	54,896	20,200	75,096
2025	54,896	-	54,896
2026	22,873	-	22,873
Total minimum lease payments	242,457	1,279,100	1,521,557
Less amount representing interest	(67,536)		
Present value of minimum capital lease payments	\$ 174,921		

**(14) Fair Value Measurements**

Financial instruments measured at fair value are classified and disclosed in the following categories:

- Level 1: Quoted prices are available in active markets for identical investments as of the reporting date. The types of investments included in Level 1 are exchange traded funds, corporate bonds, U.S. Treasury notes, real estate investment trusts, mutual funds, and money market funds.
  
- Level 2: Pricing inputs are other than quoted prices in active markets, which are either directly or indirectly observable as of the reporting date, and fair value is determined through the use of models or other valuation methodologies. Investments which are generally included in this category include agency obligations, mortgage backed securities, alternative investments, and certificates of deposit. The fair value of the Organization's investments held at the Community Foundation of Tampa Bay, Inc. and the Community Foundation of Manatee County (collectively, "Community Foundation") is based on valuation information provided by the Community Foundation which is primarily derived from or corroborated by observable market data as it relates to the Community Foundation's underlying investments.
  
- Level 3: Valuation is based on unobservable inputs. The Organization's beneficial interest in charitable remainder trusts is considered a financial asset subject to the valuation hierarchy and has been classified as Level 3 since observable inputs are minimal. Fair values for annuities payable are determined by calculating the present value of expected cash flows over the expected term of the underlying agreements.



**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(14) Fair Value Measurements - Continued**

There have been no changes in the valuation methodologies used at June 30, 2021 and 2020 and there have been no transfers between levels during the years then ended. The inputs used to measure fair value may fall into different levels of the fair value hierarchy. In such cases, a financial instrument's level within the fair value hierarchy is based on the lowest level of input that is significant to the fair value measurement.

Fair value of assets and liabilities measured on a recurring basis at June 30, 2021 are as follows:

	<u>Fair Value</u>	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
Assets:				
Cash and money market funds	\$ 2,243,675	2,243,675	-	-
Debt securities:				
Corporate bonds	3,547,123	3,547,123	-	-
Bond mutual funds	3,376,065	3,376,065	-	-
Mortgage-backed securities	2,476,169	-	2,476,169	-
U.S. government and agency obligations	925,867	514,637	411,230	-
	<u>10,325,224</u>	<u>7,437,825</u>	<u>2,887,399</u>	-
Exchange traded funds:				
Emerging markets equity	471,597	471,597	-	-
International equity	3,156,024	3,156,024	-	-
US large cap core	4,136,967	4,136,967	-	-
US large cap growth	607,985	607,985	-	-
US large cap value	5,136,601	5,136,601	-	-
US mid cap core	1,245,353	1,245,353	-	-
US small cap core	1,784,956	1,784,956	-	-
	<u>16,539,483</u>	<u>16,539,483</u>	-	-
Community Foundation investments	7,039,687	-	7,039,687	-
Receivable under remainder trusts	161,514	-	-	161,514
	<u>\$ 36,309,583</u>	<u>26,220,983</u>	<u>9,927,086</u>	<u>161,514</u>
Liabilities:				
Annuities payable	\$ 182,156	-	-	182,156
Obligation under remainder trust agreement	51,473	-	-	51,473
	<u>\$ 233,629</u>	<u>-</u>	<u>-</u>	<u>233,629</u>

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(14) Fair Value Measurements - Continued**

Fair value of assets and liabilities measured on a recurring basis at June 30, 2020 are as follows:

	<u>Fair Value</u>	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>
<b>Assets:</b>				
Cash and money market funds	\$ 1,656,818	1,656,818	-	-
<b>Debt securities:</b>				
Corporate bonds	2,924,494	2,924,494	-	-
Bond mutual funds	2,714,480	2,714,480	-	-
Mortgage-backed securities	2,557,009	-	2,557,009	-
U.S. government and agency obligations	793,827	382,597	411,230	-
	<u>8,989,810</u>	<u>6,021,571</u>	<u>2,968,239</u>	<u>-</u>
<b>Exchange traded funds:</b>				
Emerging markets equity	375,004	375,004	-	-
International equity	3,071,536	3,071,536	-	-
US large cap core	4,045,267	4,045,267	-	-
US large cap growth	466,595	466,595	-	-
US large cap value	3,804,715	3,804,715	-	-
US mid cap core	774,931	774,931	-	-
US small cap core	676,528	676,528	-	-
	<u>13,214,576</u>	<u>13,214,576</u>	<u>-</u>	<u>-</u>
Community Foundation investments	5,617,242	-	5,617,242	-
Receivable under remainder trusts	222,441	-	-	222,441
	<u>\$ 29,700,887</u>	<u>20,892,965</u>	<u>8,585,481</u>	<u>222,441</u>
<b>Liabilities:</b>				
Annuities payable	\$ 237,476	-	-	237,476
Obligation under remainder trust agreement	56,801	-	-	56,801
	<u>\$ 294,277</u>	<u>-</u>	<u>-</u>	<u>294,277</u>

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(14) Fair Value Measurements - Continued**

The following table sets forth a summary of changes in fair value for the years ended June 30, 2021 and 2020 for which the Organization has used Level 3 inputs to determine fair value:

	<u>Receivable under Remainder Trusts</u>	<u>Annuities Payable</u>	<u>Obligation under Remainder Trust</u>
Balance at June 30, 2019	\$ 321,724	256,012	70,302
Total gains (losses) included in changes in net assets	40,792	27,476	(1,035)
Contributions	76,233	-	-
Settlements	<u>(216,308)</u>	<u>(46,012)</u>	<u>(12,466)</u>
Balance at June 30, 2020	222,441	237,476	56,801
Total gains (losses) included in changes in net assets	(2,227)	(12,633)	9,434
Contributions	30,315	-	-
Settlements	<u>(89,015)</u>	<u>(42,687)</u>	<u>(14,764)</u>
Balance at June 30, 2021	\$ <u>161,514</u>	<u>182,156</u>	<u>51,471</u>

***Quantitative Information about Significant Unobservable Inputs Used in Level 3 Fair Value Measurements***

The Organization utilizes discounted cash flow methods to estimate the fair value of the receivable under remainder trusts, annuities payable and the obligation under a remainder trust. Significant unobservable inputs as of June 30, 2021 include using discount rates ranging from .46% to 1.21% and life expectancy estimates for income beneficiaries which range from 3 to 7 years. Significant unobservable inputs as of June 30, 2020 include using discount rates ranging from .18% to .49% and life expectancy estimates for income beneficiaries which range from 3 to 7 years.

**(15) Liquidity and Availability of Resources**

The Organization is supported by both contributions with and without donor restrictions. Because a donor's restriction requires resources to be used in a particular manner or in a future period, the Organization must maintain sufficient resources to meet those responsibilities to its donors. Thus, financial assets may not be available for general expenditure within one year. As part of the Organization's liquidity management, it has a policy to structure its financial assets to be available as its general expenditures, liabilities and other obligations come due. The Board designates endowment earnings to fund long-term needs of the Organization and the Finance Committee has the authority to defer distributions from the funds based upon the needs of the Organization and changing economic conditions. Additionally, the Board has designated certain net assets without donor restrictions that, while the Organization does not intend to spend for purposes other than those identified in Note 9, the amounts could be made available for current operations, if necessary.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(15) Liquidity and Availability of Resources - Continued**

As of June 30, 2021 and 2020, the Organization's financial assets available to meet general expenditures within one year were as follows:

	<b>2021</b>	<b>2020</b>
Financial assets:		
Cash and cash equivalents	\$ 23,808,798	7,331,985
Pledges receivable, net	7,025,870	5,302,925
Accrued interest	32,783	68,372
Accounts receivable	253,333	258,658
Accrued bequests	-	33,333
Investments	36,148,069	29,478,446
Receivable under remainder trusts and other	161,514	222,441
Total financial assets	67,430,367	42,696,160
Less amounts unavailable for general expenditure within one year due to:		
Contractual or donor-imposed restrictions:		
Unappropriated endowment earnings	(5,860,564)	(4,404,895)
Endowments	(3,518,538)	(3,518,538)
Program initiatives	(1,956,868)	(1,453,107)
Other donor imposed restrictions	(749,103)	(611,582)
Board-designations:		
Operating reserves	(4,901,918)	(4,575,942)
Disaster relief reserves	(1,219,925)	(1,219,925)
Quasi-endowment	(20,260,793)	(16,390,591)
Future allocations	(85,350)	(85,350)
Transformational community impact	(20,000,000)	-
Financial assets available to meet cash needs for general expenditures within one year	\$ 8,877,308	10,436,230

**(16) Pension Plan**

The Organization has adopted a defined contribution 401(k) plan for the benefit of employees who are at least 21 years old and who have completed at least ninety days of service. Employees may contribute to the plan to the extent allowable by law. The Plan requires employer safe harbor matching contributions of 100% of the first 4% of eligible compensation. For the years ended June 30, 2021 and 2020, employer contributions were approximately \$102,000 and \$120,000, respectively.

**UNITED WAY SUNCOAST, INC. AND AFFILIATE**

**Notes to Combined Financial Statements - Continued**

**(17) Paycheck Protection Program Loan**

The Organization applied for and received a forgivable Paycheck Protection Program Loan of \$1,030,500 as provided under the Federal Coronavirus Aid, Relief and Economic Security Act and the loan was funded on April 17, 2020. Under the terms of the loan, the balance is forgivable to the extent the proceeds are used for certain qualified costs for the 24 week period through October 1, 2020 and that certain employment levels are maintained. To the extent a portion of the loan does not meet the criteria to be forgiven, principal and interest is payable monthly through the maturity date of April 17, 2022. The loan carried an interest rate of 1%.

A formal request for forgiveness was submitted on the loan upon the conclusion of the performance period outlined above. In May 2021, the Organization received notice of legal release of the \$1,030,500 obligation, which is reflected in the accompanying combined statement of activities as gain on forgiveness of Paycheck Protection Program loan.

**(18) Noncash Investing and Financing Activities**

The Organization financed the acquisition of certain office equipment under a capital lease obligation in the amount of \$179,267 during the year ended June 30, 2021.

**(19) Subsequent Events**

The Organization has evaluated subsequent events through October 21, 2021, the date the combined financial statements were available for issuance.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/06/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER M. E. Wilson Company, LLC  300 W. Platt St. Ste 200 Tampa, FL 33606	1-813-229-8021	CONTACT NAME: Tammy Marshall PHONE (A/C. No. Ext): 813-984-3601 E-MAIL ADDRESS: tmarshall@mewilson.com	FAX (A/C. No): 813-229-2795
INSURED United Way Suncoast, Inc.  5401 West Kennedy Blvd Ste 600 Tampa, FL 33609		INSURER(S) AFFORDING COVERAGE INSURER A: AMGUARD INS CO INSURER B: INSURER C: INSURER D: INSURER E: INSURER F: M. E. Wilson Co LLC	
		NAIC #	42390

**COVERAGES**

CERTIFICATE NUMBER: 66509732

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	C1GP302496	03/01/22	03/01/23	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000
A	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			C2GP301850	03/01/22	03/01/23	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB DED RETENTION \$			C3GP302496	03/01/22	03/01/23	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			C1GP302496	03/01/22	03/01/23	Each Occ/Aggregate 1m/3m

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Blanket additional insured as required by written contract, written agreement or permit with respect to general liability. Blanket waiver of subrogation as required by written contract, written agreement, or permit with respect to general liability.

**CERTIFICATE HOLDER****CANCELLATION**

United Way Suncoast, Inc.  5201 West Kennedy Blvd Ste 600 Tampa, FL 33609  USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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tmarshall  
66509732

# INVESTMENT & PROGRAM OUTCOMES

## in PINELLAS COUNTY



United Way Suncoast provides leadership that improves lives and creates lasting community change by mobilizing the caring people of our communities to give, advocate, and volunteer. United Way Suncoast provides pathways to education and financial stability that give everyone in our community the freedom to rise.

**ALICE % from United Way**  
45% of below ALICE and 9% in Poverty

**\$ Invested**  
\$2,095,164 Invested for Early Learning, Financial Stability, Youth Success for Pinellas  
\$1,840,099 Invested in United Way Rapid Response Fund across five counties  
\$308,557 invested from the Public Last Resort Fund across five counties

**# of Strategic Community Partners**  
78, including 24 investment partners

**Focus Areas**  
Early Learning, Youth Success, Financial Stability

**FLKRS Analysis**  
The Impact of Covid on school has been seen throughout the state. Over 44% of the 75 school districts not achieving the state average of 57% achieving 500+ scoring.

**FSA Analysis**  
Across the state, including our 5 counties, all age groups have declined in showing proficiency in English Language Arts despite already starting at a low average of 54-57%. In 2021, the achievement for Pinellas County for grades 3-5 is 54%.

**Unemployment**  
While the standard unemployment rate for each county we serve is between 4.2 and 4.5%, that number doubles when you factor in individuals no longer looking but employable, as well as those who are underemployed seeking an alternative with true living wages.

**FINANCIAL STABILITY**

**300K DOLLARS** The Siemer Institute: In FY 21, UWS provided \$300,000 to support 649 children and 197 families through local nonprofits. Pinellas Specific: 61 families and 140 children

**450 RESIDENTS** achieved the milestone of earning certificates or higher education degrees.

**19K RESIDENTS** received food assistance/nutritious food.

**NOTABLE PROGRAMS INCLUDE:**  
100% of the participants in the MOVE UP program from the Pinellas Ex Offender Re Entry Coalition retained their employment for the program year  
Suncoast Voices for Children helped more than 40 young adults aged 18-25 who have exited the foster care system, with opening bank accounts and beginning to save for the future.

**VITA**

**12 SITES**    **2,253 RETURNS**    **\$450,600 SAVED IN FEES**    **\$3,104,830 IN REFUNDS**

**EARLY LEARNING**

**+5.5K CHILDREN** (0-pre k) demonstrated progress in communication, vocabulary, and early literacy

**+1K CHILDREN** received increased medical services related to asthma, dental, vision, and hearing issues.

**NOTABLE PROGRAMS INCLUDE:**  
The Boys & Girls Club of the Suncoast served more than 900 residents with more than 700 identified as ALICE.  
Shirley Procter Puller Foundation nearly doubled its goals of students reading on grade level, missing ten percent or less of school each month, and maintaining skills over the summer.

**READING ALL-STARS**

**+700 HOURS** of tutoring provided to the community.

**35 STUDENTS** from cohort reported an increased reading level.

**YOUTH SUCCESS**

**+650 YOUTH** have demonstrated growth in acquiring career readiness skills.

**+150 YOUNG RESIDENTS** have reported gaining work experience (i.e. internships or jobs)

**EMERGENCY RESPONSE DOLLARS**

**111,005 DOLLARS** went towards the community from the Publix Last Resort Fund.

**115,592 DOLLARS** across 543 households from Duke Energy Good Neighbor Funds

**338,769 DOLLARS** from UWS Rapid Response Fund invested in agencies serving only Pinellas County. \$515,804 invested in agencies who listed Manatee County as one of their service area.

**PEOPLE SERVED**

Strategic Community Partner		UWS Led	Publix Last Resort Fund
<b>3,265 INDIVIDUALS</b>	<b>3,306 HOUSEHOLDS</b>	<b>2,314 INDIVIDUALS</b>	<b>169 INDIVIDUALS</b>
United Way Rapid Response Fund		An additional	
<b>+47K RESIDENTS</b>	<b>+42K ALICE</b>	<b>+319K RESIDENTS</b>	<b>+64K ALICE</b>
were reported in agencies who listed this county as one of their service areas.			

**CAMPBELL PARK RESOURCE CENTER**

**+320K MEAL KITS** provided to the community.

**+400 RESIDENTS** receiving workforce services

**+80 LEGAL CASES** Through access by the Resource Center Bay Area Legal Services has successfully resolved over 80+ legal cases. Pinellas County Urban League led two educational workshops and connected 70 residents to basic services.

**NORTH GREENWOOD RESOURCE CENTER**

**+20K MEAL KITS** provided to the community.

**+100 FAMILIES** helped to access additional benefits in their community including insurance benefits, food access, and income supplements.