

Return of Organization Exempt From Income Tax

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

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

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

OMB No. 1545-0047

2021**Open to Public Inspection****A** For the **2021** calendar year, or tax year beginning **05/01/2021** and ending **04/30/2022****B** Check if applicable:

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

C Name of organization **METRO UNITED WAY INC**

Doing business as

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

Room/suite

334 East Broadway

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

Louisville, KY 40202**F** Name and address of principal officer: **Adria Johnson****334 East Broadway, Louisville, KY 40202****D** Employer identification number**61-0444680****E** Telephone number**502-583-2821****G** Gross receipts \$ **27,036,174****H(a)** Is this a group return for subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions.

H(c) Group exemption number ▶**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) () ◀ (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: ▶ www.metrounitedway.org**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶**L** Year of formation: **1917****M** State of legal domicile: **KY****Part I Summary**

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: <u>Metro United Way's mission is to improve lives and our community by engaging people to give, advocate and volunteer.</u>		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	32
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	32
	5	Total number of individuals employed in calendar year 2021 (Part V, line 2a)	5	83
	6	Total number of volunteers (estimate if necessary)	6	6,593
		7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a
b		Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	48,045,932	25,151,453
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	18,739	21,541
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	568,368	514,560
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	568,430	85,554
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	49,201,469	25,773,108
	14	Benefits paid to or for members (Part IX, column (A), line 4)	15,868,103	17,851,532
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	0	0
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	6,013,741	6,303,914
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 3,758,388	0	0
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	5,237,357	5,762,233
	18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	27,119,201	29,917,679
Net Assets or Fund Balances	19	Revenue less expenses. Subtract line 18 from line 12	22,082,268	-4,144,571
	20	Total assets (Part X, line 16)	Beginning of Current Year	End of Year
	21	Total liabilities (Part X, line 26)	59,596,828	52,656,581
22	Net assets or fund balances. Subtract line 21 from line 20	5,923,739	3,381,842	
		53,673,089	49,274,739	

Part II Signature Block

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

Sign Here

Signature of officer

Date

Phillip Bond, CFO

Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name

Preparer's signature

Date

Check ☐ if self-employed

PTIN

Firm's name ▶

Firm's EIN ▶

Firm's address ▶

Phone no.

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

For Paperwork Reduction Act Notice, see the separate instructions.

Cat. No. 11282Y

Form **990** (2021)

Part III Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☐ Yes ☒ No**1** Briefly describe the organization's mission:See 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 ☒ No

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

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

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.**4a** (Code:) (Expenses \$ 5,687,116 including grants of \$ 3,770,004) (Revenue \$ 0)We continued to raise and distribute immediate crisis funding across our seven counties in response to the COVID pandemic.**4b** (Code:) (Expenses \$ 4,754,283 including grants of \$ 3,056,913) (Revenue \$ 0)We provided 250,000+ people with needed services for health and basic needs through our 2-1-1 call center, United Community, the United Community Care & Coordination Center, and other MUW-supported programs.**4c** (Code:) (Expenses \$ 4,188,084 including grants of \$ 2,804,029) (Revenue \$ 0)Children in MUW-supported high quality early care and education are 2x more likely to be prepared for kindergarten than their peers. We expanded our youth success network, supporting more than 100 youth-serving organizations and helped parents and caregivers track their children's developmental progress.**4d** Other program services (Describe on Schedule O.) See Schedule O, Statement 1(Expenses \$ 9,719,139 including grants of \$ 7,056,555) (Revenue \$ 21,541)**4e** Total program service expenses **▶** 24,348,622

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

Part IV Checklist of Required Schedules (continued)

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

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

	Yes	No
1a Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable	1a	55
b Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable	1b	0
c Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	✓

Part V Statements Regarding Other IRS Filings and Tax Compliance (continued)		Yes	No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	83
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file. See instructions.	2b	✓
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	✓
b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	✓
b	If "Yes," enter the name of the foreign country ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	✓
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	✓
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	✓
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	✓
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	✓
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	✓
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	✓
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13	Section 501(c)(29) qualified nonprofit health insurance issuers.		
a	Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c	Enter the amount of reserves on hand	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	✓
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b	
15	Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	✓
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	✓
17	Section 501(c)(21) organizations. Did the trust, any disqualified person, or mine operator engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17	

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
1a Enter the number of voting members of the governing body at the end of the tax year . . .	1a 32		
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.			
b Enter the number of voting members included on line 1a, above, who are independent . . .	1b 32		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? . . .	2		<input checked="" type="checkbox"/>
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? . . .	3		<input checked="" type="checkbox"/>
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . .	4		<input checked="" type="checkbox"/>
5 Did the organization become aware during the year of a significant diversion of the organization's assets? . . .	5		<input checked="" type="checkbox"/>
6 Did the organization have members or stockholders? . . .	6		<input checked="" type="checkbox"/>
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? . . .	7a		<input checked="" type="checkbox"/>
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . .	7b		<input checked="" type="checkbox"/>
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:			
a The governing body? . . .	8a	<input checked="" type="checkbox"/>	
b Each committee with authority to act on behalf of the governing body? . . .	8b	<input checked="" type="checkbox"/>	
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O . . .	9		<input checked="" type="checkbox"/>

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

	Yes	No
10a Did the organization have local chapters, branches, or affiliates? . . .	10a	<input checked="" type="checkbox"/>
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? . . .	10b	
11a Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . .	11a	<input checked="" type="checkbox"/>
b Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
12a Did the organization have a written conflict of interest policy? If "No," go to line 13 . . .	12a	<input checked="" type="checkbox"/>
b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . .	12b	<input checked="" type="checkbox"/>
c Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done . . .	12c	<input checked="" type="checkbox"/>
13 Did the organization have a written whistleblower policy? . . .	13	<input checked="" type="checkbox"/>
14 Did the organization have a written document retention and destruction policy? . . .	14	<input checked="" type="checkbox"/>
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official . . .	15a	<input checked="" type="checkbox"/>
b Other officers or key employees of the organization . . .	15b	<input checked="" type="checkbox"/>
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? . . .	16a	<input checked="" type="checkbox"/>
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? . . .	16b	

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed ► **IN, KY**
- 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 ►

Phillip Bond, (502)292-6121

334 East Broadway, Louisville, KY 40202

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent ContractorsCheck if Schedule O contains a response or note to any line in this Part VII ☒**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/ 1099-MISC/ 1099-NEC)	(E) Reportable compensation from related organizations (W-2/ 1099-MISC/ 1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Theresa Reno-Weber President, CEO, and Board Secretary	50.00			✓				182,391	0	15,645
Adria Johnson President, CEO, and Board Secretary	50.00			✓				175,628	0	16,881
David Lopez Chief Development Officer	50.00					✓		161,304	0	17,322
Benjamin Donlon Chief Analytics Officer	50.00					✓		111,041	0	14,785
Melody Murphy Chief Brand Officer	50.00					✓		101,732	0	18,821
Daryle Unseld Chief Equity & Impact Officer	50.00					✓		104,560	0	4,950
Phillip Bond Chief Financial Officer	50.00			✓				147,681	0	-65,801
Lisa Bottorff Director	0.50	✓						0	0	0
Pat Carver Treasurer	1.00	✓						0	0	0
Ashley Duncan Director	0.50	✓						0	0	0
Nicole Durbin Director	0.50	✓						0	0	0
Mark Eddy Director	0.50	✓						0	0	0
Henry Erk Director	0.50	✓						0	0	0
Jose Gaztambide Director	0.50	✓						0	0	0

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) <u>Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)</u>	(E) <u>Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)</u>	(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			
Elaine Gravatte Board Chair	1.00	✓						0	0	0
Keith Hamilton Director	0.50	✓						0	0	0
Theo Hamilton Director	0.50	✓						0	0	0
Pat Hargadon Director	0.50	✓						0	0	0
Natalie Harris Director	0.50	✓						0	0	0
Jerry Henderson Director	0.50	✓						0	0	0
Aimee Jewell Director	0.50	✓						0	0	0
Josh Kornberg Director	0.50	✓						0	0	0
Stephen Lukinovich Director	0.50	✓						0	0	0
Ashwin Netto Director	0.50	✓						0	0	0
Greg Newbern Director	0.50	✓						0	0	0
Kent Oyler Director	0.50	✓						0	0	0
Lauren Peter Director	0.50	✓						0	0	0
Judi Petty Director	0.50	✓						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 dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
Marty Pollio Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Holly Prather Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Carlos Rivas Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Krish Sastry Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Holly Schifano Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Kelly Schulz Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Seema Sheth Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Woo Smith Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Tommy Wallace Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Kristen Williams Director	0.50	<input checked="" type="checkbox"/>						0	0	0
Nicole Yates Director	0.50	<input checked="" type="checkbox"/>						0	0	0
1b Subtotal								984,337	0	22,603
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								984,337	0	22,603

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 **7**

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

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
Center for Women & Families, 927 South 2nd Street, Louisville, KY 40203	Operate 211 call center	536,168
UPIC Solutions, 334 Beechwood Road, Fort Mitchell, KY 41017	Provide data management services	195,964
Nimbus, PO Box 43911, Louisville, KY 40253	Strategic Marketing Support Services	190,681

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 **3**

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
Contributions, Gifts, Grants, and Other Similar Amounts	1a	Federated campaigns	1a	0			
	b	Membership dues	1b	0			
	c	Fundraising events	1c	0			
	d	Related organizations	1d	0			
	e	Government grants (contributions)	1e	3,739,548			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	21,411,905			
	g	Noncash contributions included in lines 1a-1f	1g	\$ 179,013			
	h	Total. Add lines 1a-1f		25,151,453			
Program Service Revenue				Business Code			
	2a	Rental income	531120	14,732	14,732	0	0
	b	Administrative services	541200	6,809	6,809	0	0
	c						
	d						
	e						
	f	All other program service revenue . .		0	0	0	0
	g	Total. Add lines 2a-2f		21,541			
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		201,949	0	0	201,949
	4	Income from investment of tax-exempt bond proceeds		0	0	0	0
	5	Royalties		0	0	0	0
	6a	Gross rents	(i) Real (ii) Personal	0	0		
	b	Less: rental expenses		0	0		
	c	Rental income or (loss)		0	0		
	d	Net rental income or (loss)		0	0	0	0
	7a	Gross amount from sales of assets other than inventory	(i) Securities (ii) Other	1,575,677	0		
	b	Less: cost or other basis and sales expenses		1,263,066	0		
	c	Gain or (loss)		312,611	0		
	d	Net gain or (loss)		312,611	0	0	312,611
	8a	Gross income from fundraising events (not including \$0 of contributions reported on line 1c). See Part IV, line 18					
	b	Less: direct expenses					
	c	Net income or (loss) from fundraising events					
	9a	Gross income from gaming activities. See Part IV, line 19					
	b	Less: direct expenses					
	c	Net income or (loss) from gaming activities					
	10a	Gross sales of inventory, less returns and allowances					
	b	Less: cost of goods sold					
	c	Net income or (loss) from sales of inventory					
Miscellaneous Revenue				Business Code			
	11a	Subcontract work for Ohio Valley Education	541610	34,223	34,223	0	0
	b	Miscellaneous reimbursements	900099	51,331	51,331	0	0
	c						
	d	All other revenue		0	0	0	0
e	Total. Add lines 11a-11d		85,554				
12	Total revenue. See instructions		25,773,108	107,095	0	514,560	

Part IX Statement of Functional Expenses

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

Check if Schedule O contains a response or note to any line in this Part IX ☐**Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.**

	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	17,851,532	17,851,532		
2 Grants and other assistance to domestic individuals. See Part IV, line 22	0	0		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16	0	0		
4 Benefits paid to or for members	0	0		
5 Compensation of current officers, directors, trustees, and key employees	420,688	136,731	147,226	136,731
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0	0	0	0
7 Other salaries and wages	4,491,028	1,891,321	779,401	1,820,306
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	537,342	178,701	161,229	197,412
9 Other employee benefits	484,938	210,262	94,441	180,235
10 Payroll taxes	369,918	149,439	72,497	147,982
11 Fees for services (nonemployees):				
a Management	0	0	0	0
b Legal	6,549	543	5,279	727
c Accounting	59,900	0	59,900	0
d Lobbying	0	0	0	0
e Professional fundraising services. See Part IV, line 17	0			0
f Investment management fees	0	0	0	0
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Schedule O.)	528,608	467,363	37,993	23,252
12 Advertising and promotion	596,495	247,449	89,010	260,036
13 Office expenses	700,709	417,462	86,024	197,223
14 Information technology	2,310,055	2,105,728	54,434	149,893
15 Royalties	0	0	0	0
16 Occupancy	331,367	136,416	46,840	148,111
17 Travel	19,144	8,400	570	10,174
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0	0	0	0
19 Conferences, conventions, and meetings	311,308	188,671	27,392	95,245
20 Interest	0	0	0	0
21 Payments to affiliates	594,157	237,663	95,065	261,429
22 Depreciation, depletion, and amortization	239,311	95,725	38,289	105,297
23 Insurance	44,078	17,412	9,972	16,694
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a <u>Membership dues</u>	20,359	7,611	5,107	7,641
b <u>Miscellaneous expenses</u>	193	193	0	0
c				
d				
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	29,917,679	24,348,622	1,810,669	3,758,388
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash—non-interest-bearing	0	1	0
	2 Savings and temporary cash investments	12,210,472	2	6,055,925
	3 Pledges and grants receivable, net	8,888,128	3	7,763,396
	4 Accounts receivable, net	230,485	4	1,520,341
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons	0	5	0
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)	0	6	0
	7 Notes and loans receivable, net	0	7	0
	8 Inventories for sale or use	0	8	0
	9 Prepaid expenses and deferred charges	0	9	0
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 7,436,871		
	b Less: accumulated depreciation	10b 5,326,753	2,038,152	10c 2,110,118
	11 Investments—publicly traded securities	36,229,591	11	35,206,801
	12 Investments—other securities. See Part IV, line 11		12	0
	13 Investments—program-related. See Part IV, line 11		13	0
	14 Intangible assets		14	0
	15 Other assets. See Part IV, line 11		15	0
16 Total assets. Add lines 1 through 15 (must equal line 33)	59,596,828	16	52,656,581	
Liabilities	17 Accounts payable and accrued expenses	3,132,805	17	1,940,618
	18 Grants payable	1,636,589	18	1,343,817
	19 Deferred revenue	0	19	0
	20 Tax-exempt bond liabilities	0	20	0
	21 Escrow or custodial account liability. Complete Part IV of Schedule D	0	21	0
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable to unrelated third parties	1,073,500	24	0
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17–24). Complete Part X of Schedule D	80,845	25	97,407
	26 Total liabilities. Add lines 17 through 25	5,923,739	26	3,381,842
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	38,073,297	27	37,957,469
	28 Net assets with donor restrictions	15,599,792	28	11,317,270
	Organizations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	53,673,089	32	49,274,739
33 Total liabilities and net assets/fund balances	59,596,828	33	52,656,581	

Part XI Reconciliation of Net AssetsCheck if Schedule O contains a response or note to any line in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	25,773,108
2	Total expenses (must equal Part IX, column (A), line 25)	2	29,917,679
3	Revenue less expenses. Subtract line 2 from line 1	3	-4,144,571
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	53,673,089
5	Net unrealized gains (losses) on investments	5	-1,618,529
6	Donated services and use of facilities	6	0
7	Investment expenses	7	0
8	Prior period adjustments	8	0
9	Other changes in net assets or fund balances (explain on Schedule O)	9	1,364,750
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	49,274,739

Part XII Financial Statements and ReportingCheck if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on 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		✓
b Were the organization's financial statements audited by an independent accountant? . . . If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	✓	
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.	✓	
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? . . .	✓	
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 .	✓	

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 for instructions and the latest information.**

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization

METRO UNITED WAY INC

Employer identification number

61-0444680

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

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

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: _____
- 10 ☐ An organization that normally receives (1) more than 33¹/₃% 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 33¹/₃% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
 - a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
 - b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
 - c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
 - d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
 - e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.
 - f Enter the number of supported organizations
 - g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1–10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	33,051,570	27,433,872	23,894,734	28,048,932	25,151,453	137,580,561
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
3 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
4 Total. Add lines 1 through 3	33,051,570	27,433,872	23,894,734	28,048,932	25,151,453	137,580,561
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						37,005,852
6 Public support. Subtract line 5 from line 4						100,574,709

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
7 Amounts from line 4	33,051,570	27,433,872	23,894,734	28,048,932	25,151,453	137,580,561
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	182,883	256,939	199,291	159,041	201,949	1,000,103
9 Net income from unrelated business activities, whether or not the business is regularly carried on	0	0	0	0		0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)	74,652	102,178	134,858	568,430	85,554	965,672
11 Total support. Add lines 7 through 10						139,546,336
12 Gross receipts from related activities, etc. (see instructions)					12	162,271
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2021 (line 6, column (f), divided by line 11, column (f))	14	72.07 %
15 Public support percentage from 2020 Schedule A, Part II, line 14	15	70.91 %
16a 33¹/₃% support test—2021. If the organization did not check the box on line 13, and line 14 is 33 ¹ / ₃ % or more, check this box and stop here . The organization qualifies as a publicly supported organization <input checked="" type="checkbox"/>		
b 33¹/₃% support test—2020. If the organization did not check a box on line 13 or 16a, and line 15 is 33 ¹ / ₃ % or more, check this box and stop here . The organization qualifies as a publicly supported organization <input type="checkbox"/>		
17a 10%-facts-and-circumstances test—2021. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 10%-facts-and-circumstances test—2020. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here . Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization <input type="checkbox"/>		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions <input type="checkbox"/>		

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

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

Section A. Public Support

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

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2017	(b) 2018	(c) 2019	(d) 2020	(e) 2021	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here <input type="checkbox"/>						

Section C. Computation of Public Support Percentage

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

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2021 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2020 Schedule A, Part III, line 17	18	%
19a 33 1/3% support tests—2021. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization <input type="checkbox"/>		
b 33 1/3% support tests—2020. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization <input type="checkbox"/>		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions <input type="checkbox"/>		

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

Part IV Supporting Organizations (continued)

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

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).			
2 Activities Test. Answer lines 2a and 2b below.			
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.			
2a			
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.			
2b			
3 Parent of Supported Organizations. Answer lines 3a and 3b below.			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI .			
3a			
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.			
3b			

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

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

Section A—Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)	8	
Section B—Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	Total (add lines 1a, 1b, and 1c)	1d	
e	Discount claimed for blockage or other factors (<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	Minimum Asset Amount (add line 7 to line 6)	8	
Section C—Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	Distributable Amount. Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<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)

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

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

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

Schedule A, Part II, Line 10 - These amounts represent miscellaneous reimbursements that help offset expenses incurred for various training sessions, along with other minor expenses such as the use of Metro United Way postage and copier machines by others.

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

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

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

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

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

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

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

Name of organization

METRO UNITED WAY INC

Employer identification number

61-0444680

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. See instructions for definition of "political campaign activities."
- 2 Political campaign activity expenditures. See instructions ▶ \$
- 3 Volunteer hours for political campaign activities. See instructions

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-.
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				

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

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

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1a	Total lobbying expenditures to influence public opinion (grassroots lobbying)														
b	Total lobbying expenditures to influence a legislative body (direct lobbying)														
c	Total lobbying expenditures (add lines 1a and 1b)														
d	Other exempt purpose expenditures														
e	Total exempt purpose expenditures (add lines 1c and 1d)														
f	Lobbying nontaxable amount. Enter the amount from the following table in both columns.														
<table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
g	Grassroots nontaxable amount (enter 25% of line 1f)														
h	Subtract line 1g from line 1a. If zero or less, enter -0-														
i	Subtract line 1f from line 1c. If zero or less, enter -0-														
j	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		<input type="checkbox"/> Yes <input type="checkbox"/> No												

4-Year Averaging Period Under Section 501(h)

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below.
See the separate instructions for lines 2a through 2f.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2018	(b) 2019	(c) 2020	(d) 2021	(e) Total
2a Lobbying nontaxable amount					
b Lobbying ceiling amount (150% of line 2a, column (e))					
c Total lobbying expenditures					
d Grassroots nontaxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

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
1 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:			
a Volunteers?	✓		
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	✓		
c Media advertisements?		✓	
d Mailings to members, legislators, or the public?		✓	
e Publications, or published or broadcast statements?		✓	
f Grants to other organizations for lobbying purposes?	✓		86,000
g Direct contact with legislators, their staffs, government officials, or a legislative body?	✓		35,582
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?		✓	
i Other activities?		✓	
j Total. Add lines 1c through 1i			121,582
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		✓	
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d 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
1 Were substantially all (90% or more) dues received nondeductible by members?	1	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3 Did the organization agree to carry over lobbying and political campaign activity expenditures from the prior year?	3	

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."

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

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.

Schedule C, Part II-B, Line 1 - Lobbying state government to provide adequate funding for childcare and other activities to help children to be ready to succeed in school, beginning with kindergarten.

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

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

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization

METRO UNITED WAY INC

Employer identification number

61-0444680

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	1	0
2 Aggregate value of contributions to (during year)	0	0
3 Aggregate value of grants from (during year)	600,000	0
4 Aggregate value at end of year	4,543,595	0
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

Part II Conservation Easements.

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

1 Purpose(s) of conservation easements held by the organization (check all that apply).
☐ Preservation of land for public use (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? ☐ **Yes** ☐ **No**

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

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

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

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

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

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 ► \$

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	27,495,488	5,754,749	5,719,554	4,710,473	2,718,006
b Contributions	246,306	20,154,577	162,236	802,507	1,825,755
c Net investment earnings, gains, and losses	-288,936	1,689,618	27,715	371,528	281,058
d Grants or scholarships	0	0	0	0	0
e Other expenditures for facilities and programs	1,243,574	103,456	154,756	164,954	114,346
f Administrative expenses	0	0	0	0	0
g End of year balance	26,209,284	27,495,488	5,754,749	5,719,554	4,710,473

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

a Board designated or quasi-endowment ☒ 78.28 %

b Permanent endowment ☒ 13 %

c Term endowment ☒ 8.72 %

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

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

(i) Unrelated organizations

(ii) Related organizations

	Yes	No
3a(i)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3a(ii)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3b	<input type="checkbox"/>	<input type="checkbox"/>

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

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

Part VI Land, Buildings, and Equipment.

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	0	403,218		403,218
b Buildings	0	5,134,250	3,573,490	1,560,760
c Leasehold improvements	0	0	0	0
d Equipment	0	1,866,712	1,720,572	146,140
e Other	0	32,691	32,691	0
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				2,110,118

Part VII Investments—Other Securities.

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

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

Part VIII Investments—Program Related.

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

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

Part IX Other Assets.

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

(a) Description	(b) Book value
(1) _____	
(2) _____	
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.)	

Part X Other Liabilities.

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) Amounts due custodian funds	97,407
(3) _____	
(4) _____	
(5) _____	
(6) _____	
(7) _____	
(8) _____	
(9) _____	
Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.)	97,407

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	19,909,204
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	-1,618,529
b	Donated services and use of facilities	2b	0
c	Recoveries of prior year grants	2c	0
d	Other (Describe in Part XIII.)	2d	0
e	Add lines 2a through 2d	2e	-1,618,529
3	Subtract line 2e from line 1	3	21,527,733
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	0
b	Other (Describe in Part XIII.)	4b	4,245,375
c	Add lines 4a and 4b	4c	4,245,375
5	Total revenue. Add lines 3 and 4c . (This must equal Form 990, Part I, line 12.)	5	25,773,108

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	25,672,304
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	0
b	Prior year adjustments	2b	0
c	Other losses	2c	0
d	Other (Describe in Part XIII.)	2d	0
e	Add lines 2a through 2d	2e	0
3	Subtract line 2e from line 1	3	25,672,304
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	0
b	Other (Describe in Part XIII.)	4b	4,245,375
c	Add lines 4a and 4b	4c	4,245,375
5	Total expenses. Add lines 3 and 4c . (This must equal Form 990, Part I, line 18.)	5	29,917,679

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.

Schedule D, Part V, Line 4 - Metro United Way intends to use the net income from its endowment funds for purposes approved by its Board of Directors and in accordance with the intentions of the donors who provided the funds.

Schedule D, Part XI, Line 4b - Donor designations.

Schedule D, Part XII, Line 4b - Donor designated contributions

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

METRO UNITED WAY INC

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the United States**

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

▶ Attach to Form 990.

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Employer identification number

61-0444680

Part I General Information on Grants and Assistance

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

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

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
(1) <u>Sch I, Stmt 1</u>							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table ▶ 112
- 3** Enter total number of other organizations listed in the line 1 table ▶ 2

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

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
1					
2					
3					
4					
5					
6					
7					

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

Schedule I, Part I, Line 2 - Agencies are awarded grants to support specific programs or to accomplish specific objectives. Agencies are subjected to a program review of their finances and their track record in achieving their exempt purposes. Most agencies are also required to submit an annual or end of year grant report detailing the specific accomplishments of their supported program or initiative.

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

		Recipient EIN	Amt. of cash grant	Amt. of non- cash asst.
Name and address	2 Not 1 Fatherhood and Families 1600 West St Catherine Street Louisville, KY 40210	26-2914155	76,966	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	Parent and Child Time Programming			
Name and address	A Hand Up Community Resource Center PO Box 16066 Louisville, KY 40256	82-4185771	16,336	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	Financial Literacy Project			
Name and address	Academy Of Music Production Ed & Development LLC 4425 Greenwood Avenue Louisville, KY 40211	47-1113120	78,421	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	To support youth programming			
Name and address	ACE Project Inc 2336 Standard Avenue Louisville, KY 40210	83-3117851	26,843	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	Ace Place Program			
Name and address	Adelante Hispanic Achievers Inc 4801 Southside Drive Louisville, KY 40214	20-2267012	9,415	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	After school tutoring, mentoring and enrichment programs			
Name and address	American Red Cross PO Box 1675 Louisville, KY 40201	53-0196605	950,835	
IRC code section	501(C)(3)			
Method of valuation				
Desc. of Non-Cash Asst.				
Purpose of grant	Fund raising partnership payments			
Name and address	Americana Community Center Inc 4801 Southside Dr Louisville, KY 40214	61-1251306	146,775	
IRC code section	501(C)(3)			
Method of valuation				

Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Desc. of Non-Cash Asst.

Purpose of grant	After school programming and family education		
Name and address	Awake Ministries PO Box 1302 Shelbyville, KY 40066	26-4436314	20,833
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Provide emergency assistance		
Name and address	Backside Learning Center South 4th Street Louisville, KY 40208	37-1803514	28,835
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Family education programming		
Name and address	Big Brothers Big Sisters 1519 Gardiner Ln B Louisville, KY 40218	61-6057856	106,406
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth mentoring		
Name and address	Black Community Development Corporation 678 S 38th Street Louisville, KY 40211	61-1233868	104,168
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	The EDge Afterschool Program		
Name and address	Blue River Services PO Box 547 Corydon, IN 47112	35-1101603	16,092
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare and residential youth services		
Name and address	Boy Scouts Of America Lincoln Heritage Council Inc PO Box 36273 Louisville, KY 40233	61-0445839	17,499
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	providing programs for young people that build character.		
Name and address	Boys & Girls Clubs Of Kentuckiana 1516 Story Ave Louisville, KY 40206	61-0568789	185,917
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth services		
Name and address	Boys And Girls Club Of Harrison County	35-1983078	5,252

	600 East Chestnut St Corydon, IN 47112		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Supporting youth programming		
Name and address	Bridge Kids International 501 West Kenwood Drive Louisville, KY 40214	84-1681205	34,236
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth development and cultural promotion		
Name and address	Bridging the Gap Learning Academy 1368 So 28th St Louisville, KY 40211	47-3322565	93,750
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Bridging the Gap Learning Academy Program		
Name and address	Bullitt County Housing First 131 Garner Way Mt Washington, KY 40047	61-1854572	25,810
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Addresses homelessness in Bullitt County.		
Name and address	Bullitt County Public Schools 1040 Highway 44 East Shepherdsville, KY 40165	61-6001357	43,188
IRC code section			
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Support Teen Aged Parenting Program		
Name and address	California Area Family Development Center Inc 1705 South 13th Street Louisville, KY 40210	61-0668916	71,836
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare services and developmental programs		
Name and address	Center For Lay Ministries 213 E Maple St Jeffersonville, IN 47131	31-0903413	28,242
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Provides emergency assistance		
Name and address	Center For Non-Profit Excellence 323 W Broadway Suite 501 Louisville, KY 40202	20-0040424	5,159
IRC code section	501(C)(3)		
Method of valuation			

Desc. of Non-Cash Asst.

Purpose of grant Research, training and consultation

Name and address Center For Women & Families 61-0444846 145,445

PO Box 2048
Louisville, KY 40201

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Emergency and crisis assistance

Name and address Centro Latino Of Shelbyville Inc 02-0628043 33,804

121 Main St
Shelbyville, KY 40065

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Immigrant programming

Name and address Change Today Change Tomorrow 84-3715550 35,000

2803 South Floyd Street Suite 2A
Louisville, KY 40209

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Feed the West Program

Name and address Children Shouldn't Hunger 81-1022081 85,168

1229 South Shelby Street
Louisville, KY 40202

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant The Akoma Fellowship Program

Name and address Clark Co Youth Shelter 31-1126065 5,934

PO Box 886
Clarksville, IN 47131

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Provides 24-hour residential care for adolescents in crisis situations.

Name and address Communities In School Clark County 32-0015379 87,482

1406 Fredrick St
Jeffersonville, IN 47130

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant After school wrap-around support

Name and address Community Action of Southern Indiana 61-0660969 20,000

201 East 15th Street
Jeffersonville, IN 47130

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Books for children and minority health initiative

Name and address Community Chest Of Oldham Co Kentucky Inc 61-1240248 39,668

	PO Box 556		
	LaGrange, KY 40031		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Emergency assistance		
Name and address	Community Coordinated Child Care Inc	23-7160437	180,736
	960 South Third Street		
	Louisville, KY 40203		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Assists parents in locating and paying for childcare.		
Name and address	Concordia Lutheran Church	61-0461819	44,977
	1127 East Broadway		
	Louisville, KY 40204		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Doner designations		
Name and address	Council On Developmental Disabilities Inc	61-0476686	67,028
	1151 South Third Street		
	Louisville, KY 40203		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Advocacy and support		
Name and address	Decode Project Inc	83-2280075	21,428
	2509 Portland Avenue		
	Louisville, KY 40212		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Literacy Mentors		
Name and address	Doors To Hope	75-3124022	9,073
	4333 Hazelwood Avenue		
	Louisville, KY 40215		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	After school tutoring		
Name and address	Dorman Preschool Center	61-0620554	86,700
	PO Box 853		
	Shelbyville, KY 40066		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare		
Name and address	Elderserve Inc	61-6024140	90,780
	411 E Muhammad Ali Blvd		
	Louisville, KY 40202		
IRC code section	501(C)(3)		
Method of valuation			

Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Desc. of Non-Cash Asst.

Purpose of grant Social services for seniors

Name and address	Elevate Inc	20-5644799	9,131
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13701 Forest Bend Circle
Louisville, KY 40245

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Group mentoring for youth

Name and address	Evolve 502	83-1877240	48,668
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334 E Broadway
Louisville, KY 40202

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Removing the persistent barriers to college education

Name and address	Family And Children'S Place	61-0549561	449,456
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PO Box 3784
Louisville, KY 40201

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Provides services for children and families affected by abuse, neglect and violence.

Name and address	Family Health Centers Of Southern Indiana	35-1842342	32,115
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1301 Akers Avenue
Jeffersonville, IN 47130

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Pharmactical supplies and volutneer recruitment and training

Name and address	Family Scholar House Inc	61-1285124	44,125
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403 Reg Smith Circle
Louisville, KY 40208

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Support for single parents

Name and address	Global Game Changers Children'S Education	46-3268917	14,826
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201 East Main Street
Louisville, KY 40202

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Youth after school services

Name and address	Goodwill Of Southern Indiana	35-1019658	114,948
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PO Box 2488
Clarksville, IN 47131

IRC code section 501(C)(3)

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Childcare services and developmental programs

Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Name and address	Greater Louisville United Labor Picnic Inc 3000 Fern Valley Road Louisville, KY 40213	61-1387836	8,471
IRC code section	501(C)(4)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Designation		
Name and address	Harrison Co Community Services PO Box 308 Corydon, IN 47112	35-1378568	33,718
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Emergency assistance		
Name and address	Highland Park Community Development Corporation PO Box 16661 Louisville, KY 40256	80-0162257	20,126
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Out of school time programs for youth.		
Name and address	Hjw Career And Financial Literacy Institute PO Box 71 Shelbyville, KY 40066	20-3329409	20,516
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Financial stability efforts in Shelby and Oldham Counties		
Name and address	Home Of The Innocents 1100 E Market Street Louisville, KY 40203	61-0445834	20,237
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare center		
Name and address	Hoosier Hills Pact 35 N Public Square Salem, IN 47167	23-7351004	6,997
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Victims services		
Name and address	Hope Health Clinic 1025 Sanibel Way LaGrange, KY 40031	46-5509958	23,178
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Hope Health Clinic		
Name and address	Hope Southern Indiana 702 E Market Street New Albany, IN 47150	35-1128300	96,801
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Retired and senior volunteer program		
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Name and address	HopeBuss 3131 South 2nd Street Louisville, KY 40208	83-2485907	15,000
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Support violence response events		
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Name and address	House Of Ruth Inc 607 E St Catherine St Louisville, KY 40203	61-1231355	7,920
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Housing and basic needs assistance		
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Name and address	Jewish Community Of Louisville 3600 Dutchmans Lane Louisville, KY 40205	61-0445859	17,571
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Services for seniors		
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Name and address	Jewish Family And Career Services 3587 Dutchmans Lane Louisville, KY 40205	61-0444704	82,661
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Family counseling		
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Name and address	Kentucky Chamber of Commerce 464 Chenault Road Frankfort, KY 40601	61-1290625	10,000
IRC code section	501(C)(6)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Address criminal justice issues in Kentucky		
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Name and address	Kentucky Youth Advocates Inc 11001 Bluegrass Pkwy Ste 100 Louisville, KY 40299	61-0929390	62,513
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Youth case advocacy		
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Name and address	Kids Center For Pediatric Therapies 982 Eastern Pkwy Box 6 Louisville, KY 40217	61-0492378	47,743
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Outpatient rehabilitation for children		
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Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Name and address	Legal Aid Society Inc 425 W Muhammad Ali Blvd Louisville, KY 40202	61-0537626	47,241
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Family advocacy		
Name and address	LHome 11269 Berry Boulevard Louisville, KY 40215	45-4127209	8,333
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Financial Navigator Program		
Name and address	Lifespan Resources Inc PO Box 995 New Albany, IN 47151	35-1306887	41,138
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Transportation services		
Name and address	Lighthouse Academy At Newburg 5312 Shepherdsville Road Louisville, KY 40228	61-1362760	28,336
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Out of school time programs for youth.		
Name and address	Louisville Asset Building Coalition 334 East Broadway Louisville, KY 40202	61-0444680	50,537
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Financial education and tax services		
Name and address	Louisville Central Community Ctrs 1300 W Muhammad Ali Blvd Louisville, KY 40203	61-0590743	153,088
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare and workforce solutions		
Name and address	Louisville Jefferson County Metro Government 710 W Ormsby Suite 201 Louisville, KY 40203	32-0049006	9,167
IRC code section			
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Financial coaching		
Name and address	Louisville Urban League 1535 W Broadway Louisville, KY 40203	61-0444771	80,786
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Financial independence and youth services
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Name and address	Maryhurst Inc 1015 Dorsey Lane Louisville, KY 40223	31-1542209	60,906
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Residential youth programs
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Name and address	MOLO Village CDC 1407 W Jefferson Suite120 Louisville, KY 40201	27-5347893	26,836
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Education and NTI Hub
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Name and address	Multi Purpose Caa PO Box 305 Shelbyville, KY 40065	61-0867061	5,099
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Services for seniors
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Name and address	NAFC Education Foundation Inc 2813 Grantline Road New Albany, IN 47150	20-2552199	5,771
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Early education programs
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Name and address	Neighborhood House 201 N 25th Street Louisville, KY 40212	61-0445842	73,396
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Youth development
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Name and address	New Century Fellowship Christian Church 1875 Farnsley Road Louisville, KY 40216	47-1310903	15,650
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Employability Management
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Name and address	New Directions Housing Corp 1000 E Liberty Street Louisville, KY 40204	61-0715630	111,700
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Youth services
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Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Name and address	Oldham County Public Schools 6165 W Hwy 146 Crestwood, KY 40014	61-6001306	38,620
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth services		
Name and address	Oldham County Health Department 1786 Commerce Pkwy La Grange, KY 40031	61-1035072	21,899
IRC code section			
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Protecting and promote community health and safety		
Name and address	Oldham County Public Library 308 Yager Avenue La Grange, KY 40031	61-0595340	5,934
IRC code section			
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Early education programs		
Name and address	Operation Care Inc PO Box 1393 Shelbyville, KY 40066	61-1211189	60,422
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Emergency shelter and transitional housing		
Name and address	Options Unlimited 205 Castlerock Drive Shepherdsville, KY 40165	61-1127049	8,867
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Student transition/employment programs		
Name and address	Our Place Drug & Alcohol Education Services Inc PO Box 8 Mount St Francis, IN 47146	31-1202976	7,616
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth services		
Name and address	Personal Counseling Services 1205 Applegate Lane Clarksville, IN 47129	31-0919635	33,583
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Mental health counseling		
Name and address	Play Cousins Inc 401 Northwestern Pkwy Louisville, KY 40212	82-2811602	122,774
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Early childhood developmental screening		
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Name and address	Prichard Committee For Academic Excellence 271 W Short St Suite 202 Lexington, KY 40507	61-1026214	21,272
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Advocacy		
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Name and address	Rauch Inc 845 Park Place New Albany, IN 47150	35-1011521	36,984
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Early intervention programs for children and adults		
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Name and address	Robert Jamison Ministries Inc 1716 Theresa Avenue Louisville, KY 40216	27-4782044	21,948
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Project Inspire		
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Name and address	Salt And Light Community Development 3960 Cane Run Road Louisville, KY 40211	46-2341396	5,034
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Donor designation		
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Name and address	Salvation Army Louisville 216 W Chestnut Street Louisville, KY 40202	58-0660607	88,516
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Emergency assistance		
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Name and address	Salvation Army Southern Indiana 2300 Green Valley Rd New Albany, IN 47151	58-0660607	55,796
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Housing pilot partnership		
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Name and address	Seven Counties Services 101 W Muhammad Ali Blvd Louisville, KY 40202	31-0939757	26,318
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IRC code section	501(C)(3)
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Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant	Crisis and information center		
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Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Name and address	Shelby County Public Schools 1155 Main Street Shelbyville, KY 40065	61-6001356	74,453
IRC code section			
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Early education programs		
Name and address	Shepherdsville First Church Of The Nazarene 213 North Maple Street Shepherdsville, KY 40165	61-1278159	6,948
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Donor designation		
Name and address	Skillz 4 Life 204 East Jacob Street Louisville, KY 40203	47-2287725	140,993
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	OST and Trauma Resilience and EC Ed and K Readiness		
Name and address	Sowing Seeds With Faith 1300 W Muhammad Ali Blvd Louisville, KY 40203	81-4862518	5,756
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth program services		
Name and address	Spalding University 981 S Third Street Louisville, KY 40203	61-0444780	38,000
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Leverage Project		
Name and address	St Benedict Center 946 S 25th Street Louisville, KY 40210	61-0719980	38,939
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	After school and summer programming		
Name and address	St George'S Scholar Institute 1508 W Kentucky Street Louisville, KY 40210	61-0651560	49,607
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Out of school time programs for youth.		
Name and address	Summerbridge Louisville Inc 902 South Shelby Street Louisville, KY 40203	31-1695835	12,500
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Youth programming

Name and address	TECH-Nique 10415 Vantage Road Louisville, KY 40299	83-2267785	35,000
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Technology Entrepreneurship to Create Change Boss Summer Internship Program

Name and address	The Arthur S Kling Center Inc 219 West Ormsby Ave Louisville, KY 40203	31-0993739	21,371
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant A senior center that serves older adults both directly and through links to other providers.

Name and address	The De Paul School 1925 Duker Avenue Louisville, KY 40205	61-0711082	17,000
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Designation

Name and address	The Food Literacy Project 9001 Limehouse Land Louisville, KY 40222	20-5014424	88,059
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Donor designation

Name and address	Tiger Strike Martial Arts Academy Inc 2812 Crums Lane Louisville, KY 40216	82-2820508	23,294
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Youth program services

Name and address	Tri-County Community Action Agency 1015 Dispatchers Way LaGrange, KY 40031	61-0856637	12,149
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Purpose of grant Senior day services and senior telecare

Name and address	Turnaround Resource Center PO Box 7 Lebanon Junction, KY 40150	61-1127221	18,691
IRC code section	501(C)(3)		

Method of valuation

Desc. of Non-Cash Asst.

Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

Purpose of grant	Help lift up and encourage persons self worth and life skill successes		
Name and address	United Crescent Hill Ministry 150 State Street Louisville, KY 40206	51-0166794	5,234
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	After school youth programs		
Name and address	United Way Of Greater Cincinnati Inc 2400 Reading Rd Cincinnati, OH 45202	31-0537502	20,467
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Donor designations		
Name and address	United Way of Kentucky Inc 334 E Broadway Ste 325 PO Box 4653 Louisville, KY 40204	31-1106795	5,100
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Provides support services for United Ways in the state of Kentucky		
Name and address	Uspiritus Inc 2125 Goldsmith Lane Louisville, KY 40218	61-0471572	14,089
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Provides residential and outpatient treatment for children and youth with emotional disabilities.		
Name and address	Visually Impaired Preschool Services Inc 1906 Goldsmith Lane Louisville, KY 40218	61-1061973	14,672
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Early intervention programs for visually impaired students		
Name and address	Wellspring PO Box 1927 Louisville, KY 40201	31-1020023	23,366
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Mental health crisis stabilization and supportive housing		
Name and address	Wesley House Community Services 5114 Preston Highway Louisville, KY 40213	61-0449663	90,832
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Employment service counselling and youth brigade		
Name and address	Ymca Of Greater Louisville Inc	61-0444843	213,550

Schedule I, Part IV, Statement 1

METRO UNITED WAY INC

	545 South 2nd Street		
	Louisville, KY 40202		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Childcare programs		
Name and address	Young Adult Development In Action Inc	61-1374470	5,072
	714 South Clay		
	Louisville, KY 40203		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Workforce development		
Name and address	Youth Build - Young Adult Development In Action	61-1374470	9,055
	800 South Preston Street PO Box 638		
	Louisville, KY 40203		
IRC code section	501(C)(3)		
Method of valuation			
Desc. of Non-Cash Asst.			
Purpose of grant	Youth program services		

SCHEDULE J
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization

METRO UNITED WAY INC

Compensation Information

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

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

▶ Attach to Form 990.

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

OMB No. 1545-0047

2021

Open to Public Inspection

Employer identification number

61-0444680

Part I Questions Regarding Compensation

	Yes	No
<p>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.</p> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <input type="checkbox"/> First-class or charter travel </div> <div style="width: 50%;"> <input type="checkbox"/> Housing allowance or residence for personal use </div> <div style="width: 50%;"> <input type="checkbox"/> Travel for companions </div> <div style="width: 50%;"> <input type="checkbox"/> Payments for business use of personal residence </div> <div style="width: 50%;"> <input type="checkbox"/> Tax indemnification and gross-up payments </div> <div style="width: 50%;"> <input type="checkbox"/> Health or social club dues or initiation fees </div> <div style="width: 50%;"> <input type="checkbox"/> Discretionary spending account </div> <div style="width: 50%;"> <input type="checkbox"/> Personal services (such as maid, chauffeur, chef) </div> </div>		
<p>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</p>	1b	
<p>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?</p>	2	
<p>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.</p> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <input checked="" type="checkbox"/> Compensation committee </div> <div style="width: 50%;"> <input type="checkbox"/> Written employment contract </div> <div style="width: 50%;"> <input type="checkbox"/> Independent compensation consultant </div> <div style="width: 50%;"> <input checked="" type="checkbox"/> Compensation survey or study </div> <div style="width: 50%;"> <input type="checkbox"/> Form 990 of other organizations </div> <div style="width: 50%;"> <input checked="" type="checkbox"/> Approval by the board or compensation committee </div> </div>		
<p>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:</p>		
<p>a Receive a severance payment or change-of-control payment?</p>	4a	✓
<p>b Participate in or receive payment from a supplemental nonqualified retirement plan?</p>	4b	✓
<p>c Participate in or receive payment from an equity-based compensation arrangement?</p>	4c	✓
<p>If "Yes" to any of lines 4a–c, list the persons and provide the applicable amounts for each item in Part III.</p>		
<p>Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5–9.</p>		
<p>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:</p>		
<p>a The organization?</p>	5a	✓
<p>b Any related organization?</p>	5b	✓
<p>If "Yes" on line 5a or 5b, describe in Part III.</p>		
<p>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:</p>		
<p>a The organization?</p>	6a	✓
<p>b Any related organization?</p>	6b	✓
<p>If "Yes" on line 6a or 6b, describe in Part III.</p>		
<p>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</p>	7	✓
<p>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</p>	8	✓
<p>9 If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</p>	9	

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 and/or 1099-NEC 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	Theresa Reno-Weber, President, CEO, and Board Secretary	(i) 182,202	(ii) 0	(iii) 2,081	9,098	4,655	198,036	0
		(ii) 0	(ii) 0	(iii) 0	0	0	0	0
2	Adria Johnson, President, CEO, and Board Secretary	(i) 175,013	(ii) 0	(iii) 1,538	8,682	7,276	192,509	0
		(ii) 0	(ii) 0	(iii) 0	0	0	0	0
3	David Lopez, Chief Development Officer	(i) 161,009	(ii) 0	(iii) 1,758	7,525	8,334	178,626	0
		(ii) 0	(ii) 0	(iii) 0	0	0	0	0
4		(i)	(ii)					
		(ii)						
5		(i)	(ii)					
		(ii)						
6		(i)	(ii)					
		(ii)						
7		(i)	(ii)					
		(ii)						
8		(i)	(ii)					
		(ii)						
9		(i)	(ii)					
		(ii)						
10		(i)	(ii)					
		(ii)						
11		(i)	(ii)					
		(ii)						
12		(i)	(ii)					
		(ii)						
13		(i)	(ii)					
		(ii)						
14		(i)	(ii)					
		(ii)						
15		(i)	(ii)					
		(ii)						
16		(i)	(ii)					
		(ii)						

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

Schedule J, Part II - Theresa Reno-Weber resigned from Metro United Way effective July 30, 2021. She was replaced as President and Chief Executive Officer by Adria Johnson on August 1, 2021.

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization

METRO UNITED WAY INC

Employer identification number

61-0444680

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	✓	13	179,013	Market Value
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
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which isn't required to be used for exempt purposes for the entire holding period?				Yes No 30a ✓
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?				31 ✓
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?				32a ✓
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.				

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

Schedule M, Part I, Line 32b - Some donors contribute publicly traded stock to Metro United Way. Metro United Way's policy is to sell the contributed stock immediately and value the gift at the fair market value on the date ownership of the stock is transferred from the donor to Metro United Way.

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 Form 990-EZ.

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

OMB No. 1545-0047

2021

**Open to Public
Inspection**

Name of the organization

METRO UNITED WAY INC

Employer identification number

61-0444680

Form 990, Part III, Line 1 - At Metro United Way, we envision a community in which everyone can access education that inspires and equips, economic mobility that meets needs and builds futures, and health that provides strength and hope. Metro United Way unites and empowers communities to advance equity and share opportunities for all. We make connections that create equitable access to high-quality education, pathways out of poverty to prosperity, and addressing urgent, short-term needs. With the help of donors, volunteers, and advocates across the seven counties we serve, this past year we were able to make an impact on our community.

Form 990, Part VI, Section B, Line 11b - The IRS Form 990 is reviewed by Harding, Shymanski & Company P.S.C., the independent accounting firm that conducted Metro United Way's most recent audit. It is also reviewed by the Metro United Way Finance Committee on behalf of the Board of Directors. A copy of the 990 is provided to every member of the Board of Directors prior to filing with the IRS.

Form 990, Part VI, Section B, Line 12c - All members of the Metro United Way Board of Directors, and all employees of Metro United Way are required to disclose any potential conflicts of interest on an annual basis. In addition, all employees must disclose any outside boards or committees on which they serve. These disclosures are reviewed by both the Chief Executive Officer (CEO) and the Vice President of Human Resources. Metro United Way employees are prohibited from serving on boards or committees of any not-for-profit organization either funded or actively involved with Metro United Way without the prior permission of the CEO. The CEO must receive permission from the Metro United Way Board of Directors to serve on such boards or committees.

Form 990, Part VI, Section B, Line 15 - Compensation for Metro United Way's Chief Executive Officer is approved by independent persons on the Board of Directors, including the Board Chair, the Board Treasurer and the Chair of the Metro United Way Human Resources Committee. Prior to approving compensation, a review of compensation data from comparable sources is performed. Deliberation and discussions are contemporaneously documented. Compensation for the Chief Financial Officer is determined by the CEO, based on compensation data from comparable sources, annual performance evaluations for these key positions, and consultation, if necessary.

Form 990, Part VI, Section C, Line 19 - Metro United Way makes its governing documents and conflict of interest policy available upon request. Its IRS Form 990 and financial statements are available on Metro United Way's website.

Form 990, Part VII, Section A, Line 1a - Theresa Reno-Weber resigned from Metro United Way effective July 30, 2021. She was replaced as President and Chief Executive Officer by Adria Johnson on August 1, 2021.

Form 990, Part XI, Line 9 - Pension related changes other than net periodic pension expense. This represents the "Net Effect of Adoption of Recognition Provision of FAS 158".

Other Program Services Accomplishments

Activity Code	Description	Expense	Grants	Revenue
	Grants to not-for-profit organizations as a result of donor contributions to the Metro United Campaign that were designated to those organizations.	5,558,002	5,558,002	0
	We launched an innovative guaranteed income pilot - YaLift! - that has proven results in other communities. More than 7,000 people have participated in the MUW Racial Wealth Gap simulations and Beyond Buzzwords speaker series on diversity, equity, and inclusion. We invested in 19 Black-led social justice organizations as part of our new Black L.O.V.E. Philanthropic Partnership. We continued our financial training and workforce development efforts in Louisville's lower income neighborhoods.	4,161,137	1,498,553	21,541
Total:		9,719,139	7,056,555	21,541