

PUBLIC DISCLOSURE COPY

# TAX RETURN FILING INSTRUCTIONS

FORM 990

**FOR THE YEAR ENDING**

December 31, 2018

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**Prepared For:**

Alison Anthony  
Tulsa Area United Way  
1430 South Boulder  
Tulsa, OK 74119

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**Prepared By:**

HoganTaylor, LLP  
2222 S. Utica Place, Suite 200  
Tulsa, OK 74114-7002

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**Amount Due or Refund:**

Not applicable

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**Make Check Payable To:**

Not applicable

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**Mail Tax Return and Check (if applicable) To:**

Department of the Treasury  
Internal Revenue Service Center  
Ogden, UT 84201-0027

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**Return Must be Mailed On or Before:**

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**Special Instructions:**

This copy of the return is provided ONLY for Public Disclosure purposes. Any confidential information regarding large donors has been removed.

TULSA AREA UNITED WAY  
1430 SOUTH BOULDER  
TULSA, OK 74119

DEPARTMENT OF THE TREASURY  
INTERNAL REVENUE SERVICE CENTER  
OGDEN, UT 84201-0027



**Return of Organization Exempt From Income Tax**

OMB No. 1545-0047

Form **990**

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

**2018**

Department of the Treasury  
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Open to Public Inspection

**A** For the **2018** calendar year, or tax year beginning and ending

<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization <b>TULSA AREA UNITED WAY</b>		<b>D</b> Employer identification number <b>73-0580283</b>
	Doing business as		<b>E</b> Telephone number <b>918-583-7171</b>
	Number and street (or P.O. box if mail is not delivered to street address)	Room/suite	
	<b>1430 SOUTH BOULDER</b>		<b>G</b> Gross receipts \$ <b>24,060,392.</b>
	City or town, state or province, country, and ZIP or foreign postal code <b>TULSA, OK 74119</b>		
<b>F</b> Name and address of principal officer: <b>ALISON ANTHONY</b> <b>SAME AS C ABOVE</b>		<b>H(a)</b> Is this a group return for subordinates? ..... <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) <b>H(c)</b> Group exemption number ▶	

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) ◀ (insert no.)  4947(a)(1) or  527

**J** Website: ▶ **WWW.TAUW.ORG**

**K** Form of organization:  Corporation  Trust  Association  Other ▶ **L** Year of formation: **1924** **M** State of legal domicile: **OK**

<b>Part I Summary</b>		Prior Year	Current Year
<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <b>WE UNITE PEOPLE AND RESOURCES TO IMPROVE LIVES AND BUILD A STRONGER COMMUNITY.</b>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>53</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>50</b>
	<b>5</b> Total number of individuals employed in calendar year 2018 (Part V, line 2a)	<b>5</b>	<b>35</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>7607</b>
	<b>7 a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0.</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, line 38	<b>7b</b>	<b>0.</b>	
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>24,786,161.</b>	<b>23,755,378.</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)	<b>0.</b>	<b>0.</b>
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<b>144,038.</b>	<b>181,018.</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>44,976.</b>	<b>84,012.</b>
	<b>12</b> Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>24,975,175.</b>	<b>24,020,408.</b>
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3)	<b>20,982,460.</b>	<b>21,141,014.</b>
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)	<b>0.</b>	<b>0.</b>
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	<b>2,706,065.</b>	<b>2,793,148.</b>
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)	<b>0.</b>	<b>0.</b>
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <b>1,813,105.</b>		
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	<b>1,031,998.</b>	<b>977,590.</b>
<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	<b>24,720,523.</b>	<b>24,911,752.</b>	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>254,652.</b>	<b>-891,344.</b>	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16)	<b>Beginning of Current Year</b> <b>37,738,964.</b>	<b>End of Year</b> <b>36,454,846.</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>20,005,103.</b>	<b>19,741,838.</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>17,733,861.</b>	<b>16,713,008.</b>

**Part II Signature Block**

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

<b>Sign Here</b>	Signature of officer	Date			
	<b>ALISON ANTHONY, PRESIDENT AND CEO</b> Type or print name and title				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>LOU ANN GIBSON</b>	Preparer's signature <b>LOU ANN GIBSON</b>	Date <b>08/23/19</b>	Check if self-employed <input type="checkbox"/>	PTIN <b>P00405885</b>
	Firm's name ▶ <b>HOGANTAYLOR LLP</b>	Firm's EIN ▶ <b>73-1413977</b>	Phone no. <b>918-745-2333</b>		
Firm's address ▶ <b>2222 SOUTH UTICA PL, SUITE 200</b>		<b>TULSA, OK 74114</b>			

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

Part III Statement of Program Service Accomplishments

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

1 Briefly describe the organization's mission: THE TULSA AREA UNITED WAY UNITES PEOPLE AND RESOURCES TO IMPROVE LIVES AND BUILD A STRONGER COMMUNITY.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [ ] Yes [X] No

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

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

4a (Code: ) (Expenses \$ 8,477,478. including grants of \$ 8,141,310. ) (Revenue \$ ) HEALTH/SAFETY. OKLAHOMA'S HEALTH STATUS INDICATORS ARE AMONG THE WORST IN THE NATION. THE STATE HAS A HIGH PREVALENCE OF CARDIOVASCULAR DISEASE, DIABETES, OBESITY, STROKE, LOWER-RESPIRATORY DISEASE, ADDICTION, TEEN PREGNANCY AND INFANT MORTALITY. THE STATE RANKS POORLY IN PREVENTABLE HOSPITALIZATIONS DUE TO A LACK OF HEALTHCARE ACCESS AND HEALTH INSURANCE. TAUW INVESTS IN SOCIAL SERVICE AGENCIES AND HEALTHCARE PROVIDERS THAT WORK TO IMPROVE THESE INDICATORS THROUGH DIRECT SERVICE TO CLIENTS AND EDUCATIONAL PROGRAMS THAT PROMOTE HEALTHY LIFESTYLES. TAUW SUPPORTS PROGRAMS THAT PROVIDE SERVICES FOR PHYSICAL HEALTH, MENTAL AND BEHAVIORAL HEALTH, INDIVIDUALS WITH DISABILITIES, DOMESTIC VIOLENCE AND CHILD ABUSE, IT ALSO SUPPORTS AGENCIES THAT PROVIDE SAFETY AND DISASTER RESPONSE SERVICES.

4b (Code: ) (Expenses \$ 6,024,580. including grants of \$ 5,785,680. ) (Revenue \$ ) EDUCATION. THE NUMBER ONE RESOURCE FOR ANY CITY IS AN EDUCATED POPULATION; CITIES THAT INVEST IN EDUCATION ARE BETTER EQUIPPED TO DRIVE SUSTAINABLE ECONOMIC GROWTH. TAUW SUPPORTS THE EDUCATION OF ITS CITIZENS THROUGH FORMAL AND INFORMAL EDUCATIONAL OPPORTUNITIES FOR CHILDREN AND ADULTS AT ALL LEVELS OF ABILITY. IT INVESTS IN EARLY CHILDHOOD PROGRAMS THAT REMOVE EDUCATIONAL BARRIERS FOR VULNERABLE POPULATIONS, PRIMARY AND SECONDARY PROGRAMS THAT SUPPLEMENT CLASSROOM LEARNING AND INCREASE GRADUATION RATES, AND POST-SECONDARY INSTITUTIONS THAT PROVIDE ACCESS TO ALL. OUTSIDE THE FORMAL CLASSROOM, TAUW INVESTS IN PROGRAMS THAT INCREASE LITERACY, EMPHASIZE EXCELLENCE, AND PROVIDE PATHWAYS TO ACHIEVEMENT FOR AT-RISK YOUTH.

4c (Code: ) (Expenses \$ 5,200,695. including grants of \$ 4,994,465. ) (Revenue \$ ) FINANCIAL STABILITY. STRESSFUL ECONOMIC CONDITIONS INCREASE THE NUMBER OF PEOPLE FACING JOB LOSS, FOOD INSECURITY, NEAR- OR FULL-HOMELESSNESS, AND LEGAL CHALLENGES. TAUW FUNDS AGENCIES THAT PROVIDE BASIC NEEDS SUCH AS, FOOD, CLOTHING, RENT, UTILITIES, AND SHELTER FOR INDIVIDUALS AND FAMILIES. TAUW INVESTS IN AGENCIES THAT PROVIDE JOB TRAINING AND PLACEMENT, FINANCIAL EDUCATION AND LEGAL AID SERVICES FOR UNDERREPRESENTED AND AT-RISK POPULATIONS. TAUW'S VOLUNTEER INCOME TAX ASSISTANCE PROGRAM (VITA) PROVIDES FREE INCOME TAX ASSISTANCE USING IRS-TRAINED CERTIFIED TAX PREPARERS FOR HOUSEHOLDS MAKING UNDER \$54,000 PER YEAR.

4d Other program services (Describe in Schedule O.) (Expenses \$ 2,282,522. including grants of \$ 2,219,559. ) (Revenue \$ )

4e Total program service expenses 21,985,275.

**Part IV Checklist of Required Schedules**

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

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

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....	<b>22</b>	X
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....	<b>23</b>	X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....	<b>24c</b>	
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....	<b>24d</b>	
<b>25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? <i>If "Yes," complete Schedule L, Part II</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28a</b>	X
<b>b</b> A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28b</b>	X
<b>c</b> An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> .....	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	<b>34</b>	X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>35a</b>	X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>35b</b>	
<b>36 Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O .....	<b>38</b>	X

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

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

	Yes	No
<b>1a</b> Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable .....	<b>1a</b>	17
<b>b</b> Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable .....	<b>1b</b>	0
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	<b>1c</b>	X

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

		Yes	No
<b>2a</b>	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		35
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	X	
<b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O		
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
<b>b</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).		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
<b>c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?		
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?		X
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	X	
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	X	
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the sponsoring organization make any taxable distributions under section 4966?		
<b>b</b>	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter:		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12		
	10a		
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
	10b		
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter:		
<b>a</b>	Gross income from members or shareholders		
	11a		
<b>b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
	11b		
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year		
	12b		
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state?		
	13a		
<b>Note.</b> See the instructions for additional information the organization must report on Schedule O.			
<b>b</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		
<b>c</b>	Enter the amount of reserves on hand		
	13c		
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year?		X
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O		
	14b		
<b>15</b>	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?		X
If "Yes," see instructions and file Form 4720, Schedule N.			
<b>16</b>	Is the organization an educational institution subject to the section 4968 excise tax on net investment income?		X
If "Yes," complete Form 4720, Schedule O.			



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

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

**Section A. Governing Body and Management**

		Yes	No
<b>1a</b>	Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O.		
	<b>1a</b> 53		
<b>b</b>	Enter the number of voting members included in line 1a, above, who are independent		
	<b>1b</b> 50		
<b>2</b>	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	X	
<b>3</b>	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person?		X
<b>4</b>	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		X
<b>5</b>	Did the organization become aware during the year of a significant diversion of the organization's assets?		X
<b>6</b>	Did the organization have members or stockholders?	X	
<b>7a</b>	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		X
<b>b</b>	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		X
<b>8</b>	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
<b>a</b>	The governing body?	X	
<b>b</b>	Each committee with authority to act on behalf of the governing body?	X	
<b>9</b>	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

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

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

**Section C. Disclosure**

- 17** List the states with which a copy of this Form 990 is required to be filed **OK**
- 18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A if applicable), 990, and 990-T (Section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
 Own website     Another's website     Upon request     Other (explain in Schedule O)
- 19** Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.
- 20** State the name, address, and telephone number of the person who possesses the organization's books and records **▶**  
**CARLA MEYER - 918-583-7171**  
**1430 SOUTH BOULDER, TULSA, OK 74119**

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

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

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

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

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) BAJAJ, AKHILESH DIRECTOR	0.50	X					0.	0.	0.	
(2) BASU, MONICA DIRECTOR	0.50	X					0.	0.	0.	
(3) BENNETT, TOM DIRECTOR	0.50	X					0.	0.	0.	
(4) BREWER, KAYE DIRECTOR AT LARGE	0.50	X					0.	0.	0.	
(5) CHANDLER, JOHN DIRECTOR	0.50	X					0.	0.	0.	
(6) CLANCY, GERRY DIRECTOR	0.50	X					0.	0.	0.	
(7) COBURN, MERIDITH DIRECTOR	0.50	X					0.	0.	0.	
(8) CRAFT, J.W. DIRECTOR	0.50	X					0.	0.	0.	
(9) CRENSHAW, SUSAN DIRECTOR AT LARGE	0.50	X					0.	0.	0.	
(10) DOWNING, BETH DIRECTOR AT LARGE	0.50	X					0.	0.	0.	
(11) DRAHEIM, ERIC DIRECTOR AT LARGE	0.50	X					0.	0.	0.	
(12) DREYER, TERI DIRECTOR AT LARGE	0.50	X					0.	0.	0.	
(13) ESLICKER, LEE DIRECTOR	0.50	X					0.	0.	0.	
(14) FLETCHER, SHARON DIRECTOR	0.50	X					0.	0.	0.	
(15) FOLEY, JAY DIRECTOR	0.50	X					0.	0.	0.	
(16) GATES, CATHY TREASURER	2.00	X		X			0.	0.	0.	
(17) GIST, DEBORAH DIRECTOR	0.50	X					0.	0.	0.	

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) GOODSON, LEIGH DIRECTOR	0.50	X					0.	0.	0.	
(19) GORE, KEVIN DIRECTOR	2.00	X					0.	0.	0.	
(20) GRAHAM, MARK PRESIDENT AND CEO EMERITUS	0.50	X		X			64,938.	0.	2,501.	
(21) HAIR, CARA DIRECTOR	0.50	X					0.	0.	0.	
(22) HARDIN, TRACY DIRECTOR	0.50	X					0.	0.	0.	
(23) HAYNES, TED DIRECTOR	0.25	X					0.	0.	0.	
(24) HAYS, KIRK DIRECTOR	2.00	X					0.	0.	0.	
(25) HEWITT, JOHN CHAIRPERSON	1.00	X		X			0.	0.	0.	
(26) HOLLOWAY, ANITA DIRECTOR	0.50	X					0.	0.	0.	
<b>1b Sub-total</b> .....							64,938.	0.	2,501.	
<b>c Total from continuation sheets to Part VII, Section A</b> .....							684,187.	0.	51,409.	
<b>d Total (add lines 1b and 1c)</b> .....							749,125.	0.	53,910.	

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization **4**

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

**Section B. Independent Contractors**

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

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

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization **0**

SEE PART VII, SECTION A CONTINUATION SHEETS

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(27) HUGHES, ALANA DIRECTOR	1.00	X						0.	0.	0.
(28) JACKSON, BETSY VICE CHAIR	0.50	X		X				0.	0.	0.
(29) JOHNSON, KIMBERLY DIRECTOR	0.50	X						0.	0.	0.
(30) KAUL, MANJU DIRECTOR	2.00	X						0.	0.	0.
(31) LAKIN, PHIL DIRECTOR	0.50	X						0.	0.	0.
(32) LAWHORN, CARON ASSISTANT SECRETARY	0.50	X		X				0.	0.	0.
(33) LYONS, TIM DIRECTOR AT LARGE	0.50	X						0.	0.	0.
(34) MACLEOD, MARCIA DIRECTOR	0.50	X						0.	0.	0.
(35) MCGUFFEE, BRENDON DIRECTOR AT LARGE	0.50	X						0.	0.	0.
(36) MARTINOVICH, ROB CHAIR ELECT	5.00	X		X				0.	0.	0.
(37) MCGREW, BOB DIRECTOR	0.50	X						0.	0.	0.
(38) MEARS, MIKE ETHICS OFFICER	0.50	X		X				0.	0.	0.
(39) MITCHELL, CHUCK DIRECTOR	1.00	X						0.	0.	0.
(40) NEUMAIER, KARL DIRECTOR	0.50	X						0.	0.	0.
(41) QUIROGA, FRAUKE DIRECTOR	3.00	X						0.	0.	0.
(42) RATCLIFF, LARERONITA SECRETARY	1.00	X		X				0.	0.	0.
(43) REDMAN, MICHAEL COUNSEL	0.50	X						0.	0.	0.
(44) RHODES, MIKE DIRECTOR	0.25	X						0.	0.	0.
(45) RICHARDS, ERIC DIRECTOR AT LARGE	0.50	X						0.	0.	0.
(46) SCHAUB, JOANN DIRECTOR AT LARGE	0.50	X						0.	0.	0.
Total to Part VII, Section A, line 1c .....										



**Part VIII Statement of Revenue**

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

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514	
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>					
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions)	<b>1e</b>					
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above .....	<b>1f</b>	23,755,378.				
	<b>g</b> Noncash contributions included in lines 1a-1f: \$		313,385.				
	<b>h Total.</b> Add lines 1a-1f .....		23,755,378.				
<b>Program Service Revenue</b>	<b>2 a</b> _____		<b>Business Code</b>				
	<b>b</b> _____						
	<b>c</b> _____						
	<b>d</b> _____						
	<b>e</b> _____						
	<b>f</b> All other program service revenue .....						
	<b>g Total.</b> Add lines 2a-2f .....						
<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....			166,002.		166,002.	
	<b>4</b> Income from investment of tax-exempt bond proceeds .....						
	<b>5</b> Royalties .....						
	<b>6 a</b> Gross rents .....	(i) Real	(ii) Personal				
		<b>b</b> Less: rental expenses .....					
		<b>c</b> Rental income or (loss) .....					
		<b>d</b> Net rental income or (loss) .....					
	<b>7 a</b> Gross amount from sales of assets other than inventory .....	(i) Securities	(ii) Other				
		55,000.					
		<b>b</b> Less: cost or other basis and sales expenses .....					
		39,984.					
	<b>c</b> Gain or (loss) .....						
	15,016.						
	<b>d</b> Net gain or (loss) .....			15,016.		15,016.	
	<b>8 a</b> Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18 .....	<b>a</b>					
<b>b</b> Less: direct expenses .....		<b>b</b>					
<b>c</b> Net income or (loss) from fundraising events .....							
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....	<b>a</b>						
	<b>b</b> Less: direct expenses .....	<b>b</b>					
	<b>c</b> Net income or (loss) from gaming activities .....						
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>a</b>						
	<b>b</b> Less: cost of goods sold .....	<b>b</b>					
	<b>c</b> Net income or (loss) from sales of inventory .....						
<b>Miscellaneous Revenue</b>		<b>Business Code</b>					
<b>11 a</b> MISC .....	900099		84,012.		84,012.		
<b>b</b> _____							
<b>c</b> _____							
<b>d</b> All other revenue .....							
<b>e Total.</b> Add lines 11a-11d .....			84,012.				
<b>12 Total revenue.</b> See instructions .....			24,020,408.	0.	0.	265,030.	

**Part IX Statement of Functional Expenses**

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	21,141,014.	21,141,014.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22				
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
<b>4</b> Benefits paid to or for members				
<b>5</b> Compensation of current officers, directors, trustees, and key employees	448,716.	112,179.	112,179.	224,358.
<b>6</b> Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
<b>7</b> Other salaries and wages	1,697,181.	442,205.	489,048.	765,928.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	137,567.	38,817.	26,708.	72,042.
<b>9</b> Other employee benefits	365,818.	84,742.	83,244.	197,832.
<b>10</b> Payroll taxes	143,866.	39,654.	36,775.	67,437.
<b>11</b> Fees for services (non-employees):				
<b>a</b> Management				
<b>b</b> Legal				
<b>c</b> Accounting	45,077.		45,077.	
<b>d</b> Lobbying				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees	8,380.		8,380.	
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch. O.)	53,542.	22,527.	1,682.	29,333.
<b>12</b> Advertising and promotion	116,772.	553.	5,500.	110,719.
<b>13</b> Office expenses	42,346.	3,326.	29,758.	9,262.
<b>14</b> Information technology	34,917.	2,125.	27,598.	5,194.
<b>15</b> Royalties				
<b>16</b> Occupancy	88,467.	20,662.	29,919.	37,886.
<b>17</b> Travel	11,605.	1,249.	3,259.	7,097.
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials				
<b>19</b> Conferences, conventions, and meetings	28,743.	6,645.	10,586.	11,512.
<b>20</b> Interest				
<b>21</b> Payments to affiliates	252,861.	25,286.	126,431.	101,144.
<b>22</b> Depreciation, depletion, and amortization	92,999.	19,902.	26,504.	46,593.
<b>23</b> Insurance	17,035.	3,748.	6,984.	6,303.
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
<b>a</b> <b>SPECIAL EVENT EXPENSES</b>	142,213.	9,037.	19,654.	113,522.
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b> All other expenses	42,633.	11,604.	24,086.	6,943.
<b>25</b> Total functional expenses. Add lines 1 through 24e	24,911,752.	21,985,275.	1,113,372.	1,813,105.
<b>26</b> Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

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

**Part X Balance Sheet**

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

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	425,683.	<b>1</b>	1,534,292.
	<b>2</b> Savings and temporary cash investments .....	9,578,408.	<b>2</b>	8,923,602.
	<b>3</b> Pledges and grants receivable, net .....	16,947,998.	<b>3</b>	14,855,285.
	<b>4</b> Accounts receivable, net .....	74,777.	<b>4</b>	25,838.
	<b>5</b> Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instr). Complete Part II of Sch L .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....	24,328.	<b>9</b>	19,737.
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 3,525,181.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 3,110,138.		
	<b>11</b> Investments - publicly traded securities .....	416,763.	<b>10c</b>	415,043.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....	1,597,543.	<b>11</b>	1,423,929.
	<b>13</b> Investments - program-related. See Part IV, line 11 .....	8,618,964.	<b>12</b>	9,181,120.
	<b>14</b> Intangible assets .....		<b>13</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	54,500.	<b>14</b>	76,000.
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 34) .....	37,738,964.	<b>15</b>	36,454,846.	
<b>17</b> Accounts payable and accrued expenses .....	127,137.	<b>16</b>	49,376.	
<b>18</b> Grants payable .....	19,877,966.	<b>17</b>	19,692,462.	
<b>19</b> Deferred revenue .....		<b>18</b>		
<b>20</b> Tax-exempt bond liabilities .....		<b>19</b>		
<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>20</b>		
<b>22</b> Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L .....		<b>21</b>		
<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>22</b>		
<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>23</b>		
<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>24</b>		
<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	20,005,103.	<b>25</b>	19,741,838.	
<b>27</b> <b>Organizations that follow SFAS 117 (ASC 958), check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 29, and lines 33 and 34.</b>		<b>26</b>		
<b>28</b> Unrestricted net assets .....	12,359,404.	<b>27</b>	12,561,668.	
<b>29</b> Temporarily restricted net assets .....	4,374,457.	<b>28</b>	3,151,340.	
<b>30</b> Permanently restricted net assets .....	1,000,000.	<b>29</b>	1,000,000.	
<b>31</b> <b>Organizations that do not follow SFAS 117 (ASC 958), check here</b> <input type="checkbox"/> <b>and complete lines 30 through 34.</b>				
<b>32</b> Capital stock or trust principal, or current funds .....		<b>30</b>		
<b>33</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>31</b>		
<b>34</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>32</b>		
<b>35</b> Total net assets or fund balances .....	17,733,861.	<b>33</b>	16,713,008.	
<b>36</b> Total liabilities and net assets/fund balances .....	37,738,964.	<b>34</b>	36,454,846.	



**Part XI Reconciliation of Net Assets**

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

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	24,020,408.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	24,911,752.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	-891,344.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	<b>4</b>	17,733,861.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	-129,509.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain in Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	<b>10</b>	16,713,008.

**Part XII Financial Statements and Reporting**

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

- 1** Accounting method used to prepare the Form 990:  Cash  Accrual  Other \_\_\_\_\_  
If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.
- 2a** Were the organization's financial statements compiled or reviewed by an independent accountant? \_\_\_\_\_  
If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  
 Separate basis  Consolidated basis  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:  
 Separate basis  Consolidated basis  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 in 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 in Schedule O and describe any steps taken to undergo such audits \_\_\_\_\_

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



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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	26745213.	26507915.	24778602.	24786161.	23755378.	126573269
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	26745213.	26507915.	24778602.	24786161.	23755378.	126573269
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						10033854.
<b>6 Public support.</b> Subtract line 5 from line 4.						116539415

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>7</b> Amounts from line 4 .....	26745213.	26507915.	24778602.	24786161.	23755378.	126573269
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	62,922.	73,461.	73,637.	134,663.	166,002.	510,685.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....	1,420.	52,036.	42,938.	44,976.	84,012.	225,382.
<b>11 Total support.</b> Add lines 7 through 10						127309336
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	
<b>13 First five years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						<input type="checkbox"/>

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

<b>14</b> Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f)) .....	<b>14</b>	91.54 %
<b>15</b> Public support percentage from 2017 Schedule A, Part II, line 14 .....	<b>15</b>	93.40 %
<b>16a 33 1/3% support test - 2018.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....	<input checked="" type="checkbox"/>	
<b>b 33 1/3% support test - 2017.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....	<input type="checkbox"/>	
<b>17a 10% -facts-and-circumstances test - 2018.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....	<input type="checkbox"/>	
<b>b 10% -facts-and-circumstances test - 2017.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization .....	<input type="checkbox"/>	
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....	<input type="checkbox"/>	

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

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

**Section A. Public Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in) ►	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

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

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

<b>15</b> Public support percentage for 2018 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2017 Schedule A, Part III, line 15 .....	<b>16</b>	%

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

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

**19a 33 1/3% support tests - 2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ..... ►

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

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

**Part IV Supporting Organizations**

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

**Section A. All Supporting Organizations**

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

**Part IV Supporting Organizations** (continued)

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

**Section B. Type I Supporting Organizations**

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

**Section C. Type II Supporting Organizations**

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

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

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

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

<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).		
<b>2</b> Activities Test. Answer (a) and (b) below.		
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? <i>If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.</i>		
<b>b</b> Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? <i>If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.</i>		
<b>3</b> Parent of Supported Organizations. Answer (a) and (b) below.		
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? <i>Provide details in Part VI.</i>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? <i>If "Yes," describe in Part VI the role played by the organization in this regard.</i>		

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

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

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

<b>Section B - Minimum Asset Amount</b>		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in <b>Part VI</b> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

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

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

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

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





Schedule B

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

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2018

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

[X] 501(c)( 3 ) (enter number) organization

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

[ ] 527 political organization

Form 990-PF

[ ] 501(c)(3) exempt private foundation

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

[ ] 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization  <b>TULSA AREA UNITED WAY</b>	Employer identification number  <b>73-0580283</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	<hr/> <hr/> <hr/>	\$ <u>1,423,260.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	<hr/> <hr/> <hr/>	\$ <u>1,908,000.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	<hr/> <hr/> <hr/>	\$ <u>2,227,596.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	<hr/> <hr/> <hr/>	\$ <u>1,378,043.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	<hr/> <hr/> <hr/>	\$ <u>1,797,066.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	<hr/> <hr/> <hr/>	\$ <u>699,277.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>TULSA AREA UNITED WAY</b>	Employer identification number  <b>73-0580283</b>
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**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	<hr/> <hr/> <hr/>	\$ 500,906.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	<hr/> <hr/> <hr/>	\$ 572,054.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	<hr/> <hr/> <hr/>	\$ 642,130.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
<hr/> <hr/> <hr/>	<hr/> <hr/> <hr/>	\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization  <b>TULSA AREA UNITED WAY</b>	Employer identification number  <b>73-0580283</b>
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**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

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

Name of organization  <b>TULSA AREA UNITED WAY</b>	Employer identification number  <b>73-0580283</b>
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**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) ▶ \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

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

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

OMB No. 1545-0047

2018

Open to Public Inspection

Name of the organization TULSA AREA UNITED WAY Employer identification number 73-0580283

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.

Table with 3 columns: Question, (a) Donor advised funds, (b) Funds and other accounts. Rows include total number at end of year, aggregate value of contributions, grants, and end of year, and two yes/no questions about donor property and grant fund usage.

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

Form with multiple questions (1-9) about conservation easements, including checkboxes for various purposes, a table for tracking easements (2a-2d), and yes/no questions about monitoring and reporting.

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.

Form with questions (1a-1b, 2a-2b) about reporting collections of art and historical treasures, including dollar amounts for revenue and assets.

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
- a  Public exhibition
  - b  Scholarly research
  - c  Preservation for future generations
  - d  Loan or exchange programs
  - 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	1,635,769.	1,447,086.	1,340,158.	1,407,873.	1,417,559.
b Contributions					
c Net investment earnings, gains, and losses	-79,560.	221,734.	114,380.	-10,145.	72,863.
d Grants or scholarships					
e Other expenditures for facilities and programs	55,000.	25,000.		50,000.	75,000.
f Administrative expenses	8,380.	8,051.	7,452.	7,570.	7,549.
g End of year balance	1,492,829.	1,635,769.	1,447,086.	1,340,158.	1,407,873.

- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment  33.00 %
  - b Permanent endowment  67.00 %
  - c Temporarily restricted endowment  \_\_\_\_\_ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- |  | Yes | No |
|--|-----|----|
| (i) unrelated organizations  | X   |    |
| (ii) related organizations   |     | X  |
| b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? |     |    |
- 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		146,587.		146,587.
b Buildings		2,912,759.	2,728,806.	183,953.
c Leasehold improvements				
d Equipment		465,835.	381,332.	84,503.
e Other				
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10c.)				<b>415,043.</b>



**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) CERTIFICATES OF DEPOSIT	9,112,220.	END-OF-YEAR MARKET VALUE
(B) CASH MANAGEMENT FUND	68,900.	END-OF-YEAR MARKET VALUE
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, col. (B) line 12.) ▶	9,181,120.	

**Part VIII Investments - Program Related.**

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

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

**Part IX Other Assets.**

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

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

**Part X Other Liabilities.**

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

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

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

**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.

<b>1</b>	Total revenue, gains, and other support per audited financial statements	<b>1</b>	23,266,799.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
<b>a</b>	Net unrealized gains (losses) on investments	<b>2a</b>	-129,509.
<b>b</b>	Donated services and use of facilities	<b>2b</b>	27,000.
<b>c</b>	Recoveries of prior year grants	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	-102,509.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	23,369,308.
<b>4</b>	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	8,380.
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	642,720.
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	651,100.
<b>5</b>	Total revenue. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 12.)	<b>5</b>	24,020,408.

**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.

<b>1</b>	Total expenses and losses per audited financial statements	<b>1</b>	24,287,652.
<b>2</b>	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
<b>a</b>	Donated services and use of facilities	<b>2a</b>	27,000.
<b>b</b>	Prior year adjustments	<b>2b</b>	
<b>c</b>	Other losses	<b>2c</b>	
<b>d</b>	Other (Describe in Part XIII.)	<b>2d</b>	
<b>e</b>	Add lines <b>2a</b> through <b>2d</b>	<b>2e</b>	27,000.
<b>3</b>	Subtract line <b>2e</b> from line <b>1</b>	<b>3</b>	24,260,652.
<b>4</b>	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
<b>a</b>	Investment expenses not included on Form 990, Part VIII, line 7b	<b>4a</b>	8,380.
<b>b</b>	Other (Describe in Part XIII.)	<b>4b</b>	642,720.
<b>c</b>	Add lines <b>4a</b> and <b>4b</b>	<b>4c</b>	651,100.
<b>5</b>	Total expenses. Add lines <b>3</b> and <b>4c</b> . (This must equal Form 990, Part I, line 18.)	<b>5</b>	24,911,752.

**Part XIII Supplemental Information.**

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

**PART V, LINE 4:**

ENDOWMENT FUNDS ARE AVAILABLE FOR UNRESTRICTED USE BASED ON OUR ENDOWMENT SPENDING POLICY. THE PERMANENTLY RESTRICTED ENDOWMENT DOES NOT ALLOW SPENDING FROM THE ORIGINAL PRINCIPAL AMOUNT, \$1,000,000.

**PART XI, LINE 4B - OTHER ADJUSTMENTS:**

DESIGNATIONS TO OTHER CHARITIES 642,720.

**PART XII, LINE 4B - OTHER ADJUSTMENTS:**

DESIGNATIONS TO OTHER CHARITIES 642,720.



**SCHEDULE I  
(Form 990)**

Department of the Treasury  
Internal Revenue Service

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

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

▶ **Attach to Form 990.**

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

OMB No. 1545-0047

**2018**

**Open to Public  
Inspection**

Name of the organization **TULSA AREA UNITED WAY** Employer identification number **73-0580283**

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

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

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

<b>1 (a)</b> Name and address of organization or government	<b>(b)</b> EIN	<b>(c)</b> IRC section (if applicable)	<b>(d)</b> Amount of cash grant	<b>(e)</b> Amount of non-cash assistance	<b>(f)</b> Method of valuation (book, FMV, appraisal, other)	<b>(g)</b> Description of noncash assistance	<b>(h)</b> Purpose of grant or assistance
12 AND 12, INC. 6333 E SKELLY DR TULSA, OK 74135	73-1242962	501(C)(3)	300,000.	0.			HEALTH/SAFETY
A NEW LEAF, INC. 2306 S 1ST PL BROKEN ARROW, OK 74012	73-1042760	501(C)(3)	373,950.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
ABILITY RESOURCES, INC. 823 S. DETROIT, STE 110 TULSA, OK 74120	73-1000572	501(C)(3)	156,911.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
AMERICAN RED CROSS TULSA AREA CHAPTER - 10151 E 11TH STREET - TULSA, OK 74128	73-0579223	501(C)(3)	550,000.	0.			HEALTH/SAFETY
BIG BROTHERS BIG SISTERS OF OKLAHOMA - 5840 S MEMORIAL, STE 111 - TULSA, OK 74145	73-1226237	501(C)(3)	309,217.	0.			EDUCATION
BOY SCOUTS OF AMERICA 4295 S. GARNETT ROAD TULSA, OK 74146-4261	73-0579230	501(C)(3)	562,740.	0.			EDUCATION

- 2** Enter total number of section 501(c)(3) and government organizations listed in the line 1 table **75.**
- 3** Enter total number of other organizations listed in the line 1 table

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

Schedule I (Form 990) (2018)

**SEE PART IV FOR COLUMN (H) DESCRIPTIONS**

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BRISTOW SOCIAL SERVICES, INC. 206 S. MAIN ST. BRISTOW, OK 74010	73-1345471	501(C)(3)	70,667.	0.			FINANCIAL SECURITY
BROKEN ARROW NEIGHBORS 322 W. BROADWAY BROKEN ARROW, OK 74012	73-1195548	501(C)(3)	80,192.	0.			FINANCIAL SECURITY
BROKEN ARROW SENIORS, INC. 1800 S. MAIN ST BROKEN ARROW, OK 74012	73-1325797	501(C)(3)	44,269.	0.			HEALTH/SAFETY
CAMP FIRE USA GREEN COUNTRY COUNCIL, INC. - 706 S. BOSTON AVE - TULSA, OK 74119-1610	73-0579231	501(C)(3)	322,200.	0.			EDUCATION
CARING COMMUNITY FRIENDS, INC. OF SAPULPA - PO BOX 1524 - SAPULPA, OK 74067	73-1429214	501(C)(3)	40,000.	0.			FINANCIAL SECURITY
CENTER FOR EMPLOYMENT OPPORTUNITIES - 111 W. 5TH STREET, STE 401 - TULSA, OK 74103	13-3843322	501(C)(3)	235,000.	0.			FINANCIAL SECURITY
CHILD ABUSE NETWORK, INC. 2829 S. SHERIDAN DR TULSA, OK 74129	73-1325326	501(C)(3)	249,000.	0.			HEALTH/SAFETY
CITY YEAR 15 E 5TH ST. TULSA, OK 74103	22-2882549	501(C)(3)	100,000.	0.			COMMUNITY COLLABORATIVE IN SUPPORT OF EDUCATION
COMMUNITY ACTION PROJECT OF TULSA COUNTY - 4606 S. GARNETT ROAD, SUITE 100 - TULSA, OK 74146	73-1019247	501(C)(3)	658,894.	0.			EDUCATION; FINANCIAL SECURITY

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COMMUNITY SERVICE COUNCIL OF GREATER TULSA - 16 E 16TH ST, STE 202 - TULSA, OK 74119-4406	73-0580282	501(C)(3)	366,399.	0.			EDUCATION
COMMUNITY SERVICE COUNCIL OF GREATER TULSA - 16 E 16TH ST, STE 202 - TULSA, OK 74119-4406	73-0580282	501(C)(3)	131,600.	0.			METROPOLITAN HUMAN SERVICE COMMISSION & PLANNING PROGRAMS
COMMUNITY SERVICE COUNCIL OF GREATER TULSA - 16 E 16TH ST, STE 202 - TULSA, OK 74119-4406	73-0580282	501(C)(3)	100,000.	0.			A WAY HOME FOR TULSA - HOMELESS COLLABORATIVE
CREEK COUNTY LITERACY PROGRAM 15 N POPLAR SAPULPA, OK 74066	73-1376512	501(C)(3)	34,640.	0.			EDUCATION
CROSSROADS, INC. 1888 E. 15TH ST. TULSA, OK 74114	73-1447897	501(C)(3)	106,021.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
CROSSTOWN LEARNING CENTER 2501 E. ARCHER TULSA, OK 74110	73-0782748	501(C)(3)	140,000.	0.			EDUCATION
DOMESTIC VIOLENCE INTERVENTION SERVICES - 4300 S. HARVARD, STE 100 - TULSA, OK 74135-2608	73-1028332	501(C)(3)	910,000.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
DOMESTIC VIOLENCE INTERVENTION SERVICES SAPULPA COUNTY FAMILY RESOURCE CENTER - 4300 S. HARVARD, STE 100 - TULSA, OK 74135-2608	73-1028332	501(C)(3)	62,000.	0.			CAPACITY BUILDING
EASTERN OKLAHOMA DONATED DENTAL SERVICES - 3741 S. PEORIA AVENUE - TULSA, OK 74105	41-2103655	501(C)(3)	90,000.	0.			HEALTH/SAFETY

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
FAMILY AND CHILDREN'S SERVICES 650 S. PEORIA AVE TULSA, OK 74120	73-0580270	501(C)(3)	1,678,939.	0.			EDUCATION; HEALTH/SAFETY
FAMILY AND CHILDREN'S SERVICES 650 S. PEORIA AVE TULSA, OK 74120	73-0580270	501(C)(3)	106,011.	0.			COMMUNITY RESPONSE TEAM COMMUNITY COLLABORATIVE
GIRL SCOUTS OF EASTERN OKLAHOMA 2432 E. 51ST STREET TULSA, OK 74105-6002	73-0579240	501(C)(3)	364,994.	0.			EDUCATION
GLOBAL GARDENS PO BOX 52034 TULSA, OK 74152	20-5717276	501(C)(3)	71,500.	0.			EDUCATION
GOODWILL INDUSTRIES OF TULSA 2800 SOUTHWEST BLVD TULSA, OK 74107	73-0614297	501(C)(3)	479,365.	0.			FINANCIAL SECURITY
HOSPICE OF GREEN COUNTRY, INC. 2121 S COLUMBIA, STE 200 TULSA, OK 74114-3516	73-1261742	501(C)(3)	123,452.	0.			HEALTH/SAFETY
KIPP ACADEMY 1661 E VIRGIN ST TULSA, OK 74106	11-3740269	501(C)(3)	372,500.	0.			EDUCATION
LEADERSHIP TULSA NEW VOICES 1717 S. BOULDER AVE, STE 104 TULSA, OK 74119	73-1042332	501(C)(3)	17,250.	0.			INITIATIVE TO INCREASE DIVERSITY ON TULSA AREA UNITED WAY AGENCY BOARDS
LEGAL AID SERVICES OF OKLAHOMA, INC - 907 S DETROIT STE 725 - TULSA, OK 74120	73-1022203	501(C)(3)	472,660.	0.			FINANCIAL SECURITY

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
LIFE SENIOR SERVICES, INC. 5950 E 31ST STREET TULSA, OK 74135-5114	73-1043783	501(C)(3)	773,967.	0.			EDUCATION; HEALTH/SAFETY; FINANCIAL SECURITY
MENTAL HEALTH ASSOCIATION IN TULSA 5330 E 31ST STREET, STE 1000 TULSA, OK 74135	73-0657931	501(C)(3)	540,980.	0.			EDUCATION; HEALTH/SAFETY; FINANCIAL SECURITY
MORTON COMPREHENSIVE HEALTH SERVICES - 1334 NORTH LANSING AVE - TULSA, OK 74106	73-1177858	501(C)(3)	415,000.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
OKMULGEE COUNTY FAMILY RESOURCE CENTER - PO BOX 73 - OKMULGEE, OK 74447	73-1332643	501(C)(3)	129,634.	0.			HEALTH/SAFETY
OKMULGEE COUNTY HOMELESS SHELTER PO BOX 1635 OKMULGEE, OK 74447	73-1485176	501(C)(3)	90,000.	0.			FINANCIAL SECURITY
OKMULGEE OKFUSKEE COUNTY YOUTH SERVICES - 1950 N. OKMULGEE - OKMULGEE, OK 74447	73-1486908	501(C)(3)	129,793.	0.			EDUCATION
OPERATION AWARE OF OKLAHOMA 7226 E 41ST ST TULSA, OK 74145	73-1112912	501(C)(3)	142,778.	0.			EDUCATION
OWASSO COMMUNITY RESOURCES 109 N BIRCH ST, STE 109 OWASSO, OK 74055	73-1445318	501(C)(3)	67,213.	0.			FINANCIAL SECURITY
PALMER CONTINUUM OF CARE, INC 2442 MOHAWK BLVD TULSA, OK 74110	56-2302027	501(C)(3)	306,718.	0.			HEALTH/SAFETY

Schedule I (Form 990)



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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE PARENT CHILD CENTER OF TULSA 1421 S. BOSTON AVE TULSA, OK 74119-4032	73-1113167	501(C)(3)	590,254.	0.			HEALTH/SAFETY
THE PARENT CHILD CENTER OF TULSA 1421 S. BOSTON AVE TULSA, OK 74119-4032	73-1113167	501(C)(3)	80,000.	0.			SAFE BABIES COURT
READING PARTNERS 110 WEST 7TH STREET TULSA, OK 74119	77-0568469	501(C)(3)	312,500.	0.			EDUCATION
RETIRED SENIOR VOLUNTEER PROGRAM 5756 E 31ST STREET TULSA, OK 74135-5103	73-1009086	501(C)(3)	78,913.	0.			EDUCATION
SAND SPRINGS COMMUNITY SERVICES 15 E 2ND STREET SAND SPRINGS, OK 74063	73-0582550	501(C)(3)	72,079.	0.			EDUCATION; FINANCIAL SECURITY
SHOW, INC 425 W WELLS SAPULPA, OK 74066	73-1028650	501(C)(3)	118,835.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
STREET SCHOOL 1135 S. YALE AVE TULSA, OK 74112-5396	73-0942963	501(C)(3)	365,007.	0.			EDUCATION
THE BRIDGES FOUNDATION 1345 N LEWIS AVE TULSA, OK 74110-4702	73-0740763	501(C)(3)	232,000.	0.			FINANCIAL SECURITY
THE CENTER FOR INDIVIDUALS WITH PHYSICAL CHALLENGES - 815 S. UTICA AVE - TULSA, OK 74104-3612	73-6070545	501(C)(3)	307,255.	0.			HEALTH/SAFETY

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE SALVATION ARMY 1616 S. MAIN TULSA, OK 74119	73-0579266	501(C)(3)	1,394,596.	0.			EDUCATION; HEALTH/SAFETY; FINANCIAL SECURITY
FOUNDATION FOR TULSA SCHOOLS 3027 S. NEW HAVEN AVE TULSA, OK 74114-6134	73-1612027	501(C)(3)	409,000.	0.			STRONG TOMORROWS PREGNANCY PREVENTION PROGRAM
TRISTESSE GRIEF CENTER 2502 E. 71ST STREET, SUITE A TULSA, OK 74136	73-1619790	501(C)(3)	75,000.	0.			HEALTH/SAFETY
TSHA, INC 8740 E 11TH STREET, SUITE A TULSA, OK 74112-7957	73-6102812	501(C)(3)	216,681.	0.			EDUCATION; FINANCIAL SECURITY
TULSA ADVOCATES FOR THE RIGHTS OF CITIZENS WITH DEVELOPMENT DISABILITIES - 2516 E 71ST STREET, SUITE A - TULSA, OK 74136	73-0749376	501(C)(3)	171,341.	0.			EDUCATION; FINANCIAL SECURITY
TULSA BOYS HOME PO BOX 1101 TULSA, OK 74101-1101	73-0579242	501(C)(3)	343,495.	0.			HEALTH/SAFETY
TULSA CAMPAIGN TO PREVENT TEEN PREGNANCY - 1601 S. MAIN ST, SUITE 200 - TULSA, OK 74119	47-1170599	501(C)(3)	60,000.	0.			TEEN PREGNANCY PREVENTION PROGRAM
HIV RESOURCE CONSORTIUM, INC 3507 E ADMIRAL PLACE TULSA, OK 74115-8211	73-1388569	501(C)(3)	519,536.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
TULSA COMMUNITY FOUNDATION 7030 S YALE AVE, SUITE 600 TULSA, OK 74136	73-1554474	501(C)(3)	220,000.	0.			IMPACT TULSA COMMUNITY COLLABORATIVE EDUCATION INITIATIVE

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TULSA CASA, INC 700 S BOSTON, SUITE 230 TULSA, OK 74119	73-1312870	501(C)(3)	112,609.	0.			HEALTH/SAFETY
NEW WORKFORCE DIRECTIONS DBA MADISON STRATEGIES GROUP - 907 S. DETROIT, SUITE 210 - TULSA, OK 74120	27-2323749	501(C)(3)	150,000.	0.			FINANCIAL SECURITY
NEW WORKFORCE DIRECTIONS DBA MADISON STRATEGIES GROUP - 907 S. DETROIT, SUITE 210 - TULSA, OK 74120	27-2323749	501(C)(3)	50,500.	0.			FINANCIAL STABILITY INNOVATION GRANT IN SUPPORT OF FINANCE ADVANCE A FINANCIAL
NEW WORKFORCE DIRECTIONS DBA MADISON STRATEGIES GROUP - 907 S. DETROIT, SUITE 210 - TULSA, OK 74120	27-2323749	501(C)(3)	100,000.	0.			FINANCIAL STABILITY INNOVATION GRANT IN SUPPORT OF DUE NORTH PROGRAM IN NORTH TULSA
TULSA COUNTY CHILD PROTECTION CENTER - 4300 S HARVARD, SUITE 204 - TULSA, OK 74135	73-1554474	501(C)(3)	42,500.	0.			MODEL COURT PROGRAM
TULSA DAY CENTER FOR THE HOMELESS 415 W. ARCHER TULSA, OK 74103	73-1557819	501(C)(3)	235,000.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
TULSA REGIONAL STEM ALLIANCE 907 S DETROIT AVE, SUITE 600 TULSA, OK 74120	81-4051559	501(C)(3)	70,000.	0.			EDUCATION
WAGONER AREA NEIGHBORS PO BOX 933 TULSA, OK 74477	73-1351405	501(C)(3)	66,150.	0.			FINANCIAL SECURITY
YOUNG MEN'S CHRISTIAN ASSOCIATION OF TULSA - 420 S MAIN, SUITE 200 - TULSA, OK 74103	73-0579269	501(C)(3)	734,018.	0.			EDUCATION; HEALTH/SAFETY

Schedule I (Form 990)

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

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
YOUTH AT HEART 6026 S SHERIDAN ROAD TULSA, OK 74145	73-1043630	501(C)(3)	230,300.	0.			EDUCATION
YOUTH SERVICES OF CREEK COUNTY PO BOX 2346 TULSA, OK 74067-2346	73-1301335	501(C)(3)	150,000.	0.			EDUCATION; HEALTH/SAFETY
YOUTH SERVICES OF TULSA 311 S MADISON TULSA, OK 74120	73-0785251	501(C)(3)	807,336.	0.			EDUCATION; HEALTH/SAFETY; FINANCIAL SECURITY
YOUNG WOMEN'S CHRISTIAN ASSOCIATION - 1910 S LEWIS AVE, SUITE 200 - TULSA, OK 74104-5708	73-0579296	501(C)(3)	428,018.	0.			HEALTH/SAFETY; FINANCIAL SECURITY
ROGERS COUNTY UNITED WAY PO BOX 1165 CLAREMORE, OK 74018	73-1249045	501(C)(3)	75,000.	0.			FUNDS HEALTH AND HUMAN SERVICE ORGANIZATIONS

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

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

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

**PART I, LINE 2:**

TULSA AREA UNITED WAY USES A DETAILED PROCESS FOR EVALUATING ITS PARTNER AGENCIES AND TRACING THE USE OF ALLOCATED FUNDS. THE TULSA AREA UNITED WAY COMMUNITY INVESTMENTS STAFF, IN CONJUNCTION WITH OVER 170 COMMUNITY PANEL VOLUNTEERS, STUDY THE APPLICATIONS OF PARTNER AGENCIES WITH PARTICULAR ATTENTION PAID TO GOVERNANCE AND MANAGEMENT STANDARDS, THE FISCAL STABILITY OF THE AGENCY, ACCURACY OF REPORTING THE USE OF ALLOCATED FUNDS AND THE RESULTS ACHIEVED FOR AGENCY CLIENTS. THE PANEL VOLUNTEERS CONDUCT A SITE VISIT WITH EACH AGENCY EACH YEAR, GATHERING MORE DETAILED INFORMATION AS

**Part IV** Supplemental Information

NEEDED. PANEL VOLUNTEERS CONDUCT A FINAL MEETING AT WHICH THEY DETERMINE THE RECOMMENDED ALLOCATION. FOLLOWING THESE MEETINGS, THE PANEL CHAIR AND CO-CHAIRS MEET WITH A DIVISION LEADER TO EXPLAIN THE PANEL RECOMMENDATIONS. THE DIVISION LEADERS THEN MEET TO FINALIZE AND APPROVE THE FUNDING RECOMMENDATIONS. THE TOTAL RECOMMENDED FUNDING IS PRESENTED TO THE COMMUNITY INVESTMENTS CABINET, AND THEN TO THE TULSA AREA UNITED WAY BOARD OF DIRECTORS FOR ACCEPTANCE AND APPROVAL. AGENCIES PROVIDE A DETAILED REPORT ON HOW FUNDS WERE SPENT AT THE END OF EACH CALENDAR YEAR AS A CRITICAL PART OF THEIR APPLICATION FOR FUTURE FUNDING.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT:

NEW WORKFORCE DIRECTIONS DBA MADISON STRATEGIES GROUP

(H) PURPOSE OF GRANT OR ASSISTANCE: FINANCIAL STABILITY INNOVATION GRANT IN SUPPORT OF FINANCE ADVANCE A FINANCIAL LITERACY PROGRAM

**SCHEDULE J  
(Form 990)**

**Compensation Information**

OMB No. 1545-0047

**2018**

Open to Public Inspection

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

Department of the Treasury  
Internal Revenue Service

Name of the organization: **TULSA AREA UNITED WAY**  
 Employer identification number: **73-0580283**

**Part I Questions Regarding Compensation**

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

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

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

**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? ..... **2**

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

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

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

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

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

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

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

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

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

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

**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 ..... **8**

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

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

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

Schedule J (Form 990) 2018

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

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

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

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) ANTHONY, ALISON CHIEF EXECUTIVE OFFICER	(i)	215,000.	55,000.	0.	21,800.	0.	291,800.	0.
	(ii)	0.	0.	0.	0.	0.	0.	0.
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
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	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							



**Part III Supplemental Information**

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

**PART I, LINE 3:**

COMPENSATION IS APPROVED ANNUALLY BY THE BOARD COMPENSATION COMMITTEE WHICH IS MADE UP OF CURRENT AND FORMER DIRECTORS OF THE ORGANIZATION. THE COMMITTEE DIRECTLY SETS/APPROVES THE PRESIDENT AND CEO'S SALARY AND INDIRECTLY APPROVES ALL OTHER STAFF POSITION SALARIES BASED ON THE RECOMMENDATION OF THE PRESIDENT AND CEO. FOLLOWING THAT COMMITTEE MEETING, THE BOARD COMPENSATION COMMITTEE RECOMMENDATIONS ARE APPROVED BY THE FINANCE AND AUDIT COMMITTEE AND THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS.

**PART I, LINE 7:**

VARIABLE COMPENSATION WAS AWARDED TO EMPLOYEES OF THE ORGANIZATION BASED UPON EACH INDIVIDUAL'S PERFORMANCE DURING THE YEAR. EACH YEAR, THE PRESIDENT AND CEO REQUESTS A BUDGET FOR VARIABLE COMPENSATION FROM THE COMPENSATION COMMITTEE. INDIVIDUAL AMOUNTS ARE DISCRETIONARY AND JOINTLY AGREED UPON BY EMPLOYEES' SUPERVISORS AND THE PRESIDENT AND CEO.





**SCHEDULE M  
(Form 990)**

**Noncash Contributions**

OMB No. 1545-0047

**2018**

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

Name of the organization **TULSA AREA UNITED WAY** Employer identification number **73-0580283**

**Part I Types of Property**

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art - Works of art				
2 Art - Historical treasures				
3 Art - Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities - Publicly traded	X	19	220,885.	FAIR 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 ▶ ( FULL PAGE ADS )	X	13	71,000.	FAIR MARKET VALUE
26 Other ▶ ( AIRLINE TICKE )	X	2	12,000.	FAIR MARKET VALUE
27 Other ▶ ( CLOTHING CRED )	X	1	6,000.	FAIR MARKET VALUE
28 Other ▶ ( WINE FOR AUCT )	X	12	3,500.	FAIR MARKET VALUE

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

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



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

Department of the Treasury  
Internal Revenue Service

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

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

▶ Attach to Form 990 or 990-EZ.

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

OMB No. 1545-0047

**2018**

Open to Public  
Inspection

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

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

INNOVATION GRANTS, ROGERS COUNTY, COMBINED FEDERAL CAMPAIGN

DESIGNATIONS, COMBINED STATE CAMPAIGN DESIGNATIONS, OTHER DESIGNATIONS,

OTHER SPECIAL GRANTS, COLLABORATIVE FUNDING, CAPACITY BUILDING,

CAPACITY BUILDING - AGENCY CONTRACT WORK, CAPACITY BUILDING - BRIDGE

FUNDING, SPECIAL GRANT

EXPENSES \$ 2,282,522. INCLUDING GRANTS OF \$ 2,219,559. REVENUE \$ 0.

FORM 990, PART VI, SECTION A, LINE 2:

WITHIN THE BOARD OF DIRECTORS, BOARD CHAIR STEVE BRADSHAW AND DIRECTOR

MARLA BRADSHAW HAVE A FAMILY RELATIONSHIP. ADDITIONALLY, THERE ARE NUMEROUS

BUSINESS RELATIONSHIPS WITHIN THE BOARD. OUR BOARD CONTAINS THE HEADS OF

MAJOR EMPLOYERS SUCH AS BANKS, LOCAL UTILITY COMPANIES AND HEALTH INSURANCE

PROVIDERS. BOARD MEMBERS ARE REQUIRED TO ANNUALLY DISCLOSE ANY INTERESTS

THAT COULD GIVE RISE TO CONFLICTS. CIRCUMSTANCES WHICH CREATE POSSIBLE

CONFLICTS ARE REVIEWED BY THE FINANCE AND AUDIT COMMITTEE. SHOULD THE

COMMITTEE DETERMINE THAT A POTENTIAL CONFLICT OF INTEREST IS PRESENT, THAT

INFORMATION WILL BE TAKEN TO THE EXECUTIVE COMMITTEE OF THE BOARD OF

DIRECTORS. THE EXECUTIVE COMMITTEE WILL ADDRESS ANY CONCERNS REGARDING A

POTENTIAL CONFLICT OF INTEREST AND TAKE APPROPRIATE ACTION TO RESOLVE ANY

CONFLICT.

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

ALL DONORS ARE CONSIDERED MEMBERS OF THE ORGANIZATION.

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

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

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

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

A DRAFT OF THE FORM 990 IS PROVIDED TO AND REVIEWED WITH THE FINANCE AND AUDIT COMMITTEE OF THE BOARD OF DIRECTORS. AN EMAIL IS ALSO SENT TO THE BOARD ADVISING THEM THE 990 HAD BEEN PLACED ON THE BOARD INTRANET FOR THEIR REVIEW AND RESPONSE BEFORE FILING.

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

OFFICERS, DIRECTORS, AND KEY EMPLOYEES ARE REQUIRED TO ANNUALLY DISCLOSE ANY INTERESTS THAT COULD GIVE RISE TO CONFLICTS. CIRCUMSTANCES WHICH CREATE POSSIBLE CONFLICTS ARE REVIEWED, AND IF IT IS DETERMINED THAT A POTENTIAL CONFLICT OF INTEREST IS PRESENT, THAT INFORMATION WILL BE TAKEN TO THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS. THE EXECUTIVE COMMITTEE WILL ADDRESS ANY CONCERNS REGARDING A POTENTIAL CONFLICT OF INTEREST AND TAKE APPROPRIATE ACTION TO RESOLVE ANY CONFLICT.

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

COMPENSATION IS APPROVED ANNUALLY BY THE BOARD COMPENSATION COMMITTEE WHICH IS MADE UP OF CURRENT AND FORMER DIRECTORS OF THE ORGANIZATION. ANNUALLY, EXTENSIVE COMPENSATION DATA IS COLLECTED FROM UNITED WAY WORLDWIDE, OKLAHOMA CENTER FOR NON-PROFITS, SIMILAR UNITED WAYS, AND LARGE PARTNER AGENCIES AND PROVIDED TO THE PRESIDENT AND CEO FOR HER CONSIDERATION. THE BOARD COMPENSATION COMMITTEE DIRECTLY SETS/APPROVES THE PRESIDENT AND CEO'S SALARY AND INDIRECTLY APPROVES ALL OTHER STAFF POSITION SALARIES BASED ON THE RECOMMENDATION OF THE PRESIDENT AND CEO. FOLLOWING THAT COMMITTEE MEETING, THE BOARD COMPENSATION COMMITTEE RECOMMENDATIONS ARE APPROVED BY THE FINANCE AND AUDIT COMMITTEE AND THE EXECUTIVE COMMITTEE OF THE BOARD OF DIRECTORS.

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

Name of the organization

TULSA AREA UNITED WAY

Employer identification number

73-0580283

FINANCIAL STATEMENTS ARE IN OUR ANNUAL REPORT AND ARE PUBLISHED IN OUR LOCAL NEWSPAPER, A LOCAL MAGAZINE, AND OUR LOCAL WEBSITE. OUR GOVERNING DOCUMENTS AND CONFLICTS OF INTEREST POLICY ARE AVAILABLE UPON REQUEST.

FORM 990, PART XII, LINE 2C

THERE WERE NO CHANGES IN THE PROCESS FROM THE PREVIOUS YEAR.



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

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ **Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.**

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

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

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

	Enter filer's identifying number	
<b>Type or print</b>	Name of exempt organization or other filer, see instructions. <b>TULSA AREA UNITED WAY</b>	Employer identification number (EIN) or <b>73-0580283</b>
File by the due date for filing your return. See instructions.	Number, street, and room or suite no. If a P.O. box, see instructions. <b>1430 SOUTH BOULDER</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>TULSA, OK 74119</b>	

Enter the Return Code for the return that this application is for (file a separate application for each return) 0 | 1

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

**CARLA MEYER**

- The books are in the care of ▶ **1430 SOUTH BOULDER - TULSA, OK 74119**  
Telephone No. ▶ **918-583-7171** Fax No. ▶ \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **NOVEMBER 15, 2019**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
▶  calendar year **2018** or  
▶  tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

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

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

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