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Form 990  Department of the Treasury Internal Revenue Service	Return of Organization Exempt From Income Tax Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)	OMB No 1545-0047
	The organization may have to use a copy of this return to satisfy state reporting requirements	2008 Open to Public Inspection

A For the 2008 calendar year, or tax year beginning 07-01-2008 and ending 06-30-2009				
B Check if applicable ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending	Please use IRS label or print or type. See Specific Instructions.	C Name of organization UNITED WAY INC dba UNITED WAY OF GREATER PORTLAND		D Employer identification number 01-0241767
		Doing Business As		E Telephone number (207) 874-1000
		Number and street (or P O box if mail is not delivered to street address) PO BOX 15200	Room/suite	G Gross receipts \$ 12,237,943
		City or town, state or country, and ZIP + 4 PORTLAND, ME 041125200		
		F Name and address of Principal Officer MEG BAXTER PO BOX 15200 PORTLAND, ME 041125200		
I Tax-exempt status ☒ 501(c) (3) ☐ (Insert no) ☐ 4947(a)(1) or ☐ 527		H(b) Are all affiliates included? ☐ Yes ☐ No (If "No," attach a list See instructions)		
J Web site: ☒ www.liveunitedportland.org		H(c) Group Exemption Number ☒		
K Type of organization ☒ Corporation ☐ trust ☐ association ☐ other ☐			L Year of Formation 1929	M State of legal domicile ME

Part I Summary

Activities & Governance	1	Briefly describe the organization’s mission or most significant activities improving lives by focusing on the building blocks of a strong community educ , income & health		
	2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	28
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	28
	5	Total number of employees (Part V, line 2a)	5	42
	6	Total number of volunteers (estimate if necessary)	6	200
	7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a	0
	b	Net unrelated business taxable income from Form 990-T, line 34	7b	0
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9	Program service revenue (Part VIII, line 2g)	10,624,615	10,291,333
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	194,377	51,846
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	509,670	-59,060
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	82,283	236,629
			11,410,945	10,520,748
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	7,414,210	7,975,589
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	1,962,729	1,961,651
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	(Total fundraising expenses, Part IX, column (D), line 25 <u>809,208</u>)		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	1,177,192	1,112,411
	18	Total expenses—add lines 13–17 (must equal Part IX, line 25, column (A))	10,554,131	11,049,651
	19	Revenue less expenses Subtract line 18 from line 12	856,814	-528,903
Net Assets or Fund Balances			Beginning of Year	End of Year
	20	Total assets (Part X, line 16)	16,238,295	14,470,334
	21	Total liabilities (Part X, line 26)	2,313,302	2,390,848
	22	Net assets or fund balances Subtract line 21 from line 20	13,924,993	12,079,486

Part II Signature Block

Please Sign Here	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				
	*****		2010-05-03		
	Signature of officer		Date		
	SUZANNE MCCORMICK PRESIDENT/CEO Type or print name and title				
Paid Preparer's Use Only	Preparer's signature		Date	Check if self-employed ☐	Preparer's PTIN (See Gen Inst)
	Firm's name (or yours if self-employed), address, and ZIP + 4 BAKER NEWMAN & NOYES PO BOX 507 PORTLAND, ME 04112		EIN ☐		
			Phone no ☐ (207) 879-2100		

Part III

Statement of Program Service Accomplishments (See the instructions.)

1

Briefly describe the organization’s mission

See Additional Data Table

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

Yes

No

If “Yes,” describe these new services on Schedule O

3

Did the organization cease conducting or make significant changes in how it conducts any program services?

Yes

No

If “Yes,” describe these changes on Schedule O

4

Describe the exempt purpose achievements for each of the organization’s three largest program services by expenses

Section 501(c)(3) and (4) organizations and 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code) (Expenses \$ 2,367,142 including grants of \$ 1,734,268) (Revenue \$)

HEALTH Improving people's physical and mental well-being is one of the building blocks of a thriving community, however, numerous obstacles stand in the way of good health for many residents of Greater Portland United Way funds 46 programs at 23 Partner Agencies that focus on health, helping us advance our health goals in the community From addressing substance abuse to funding vision rehabilitation programs and outpatient mental health clinical services, United Way works tirelessly to improve life for thousands of friends, neighbors and co-workers in Greater Portland In addition, United Way in collaboration with several community partners manages the Let's Go! Program, a community-based initiative that promotes healthy lifestyles for children, youth and families in 12 Greater Portland communities The goal is to increase physical activity and healthy eating, turning the trend on youth obesity We accomplish our goals with the 5-2-1-0 message eat at least 5 fruits and vegetables a day, limit recreational TV or computer use to 2 hours or less, get 1 hour or more of physical activity every day, and drink 0 sugar-sweetened beverages and choose low fat milk or water instead of soda As of June 2009, Let's Go! has engaged more than 6,800 students at 43 schools, more than 1,000 children at 13 childcare sites, 128 physicians in practices throughout the 12 communities, 780 youths at five afterschool recreation centers, and six of Portland's largest employers Evaluation data in 2009 confirms that this model is on the right track - There was a 27% increase in the proportion of children meeting at least 3 out of 4 of the recommended 5-2-1-0 behaviors (28% in 2009 compared to 22% in 2007) - 49% of all parents in the 12 communities are now aware of Lets Go! and 43% are aware of the 5-2-1-0 message - 96% of parents report a positive reaction to the Let's Go! approach and messages - The multi-sector theory is validated parents reporting exposure to 5-2-1-0 across 3 or more channels (28% of all parents) are more likely to - be aware of the 5-2-1-0 message - be able to identify all 4 healthy behaviors - be more favorable toward the Let's Go! message, and - have children that meet the "1" physical activity recommendation

4b

(Code) (Expenses \$ 1,434,236 including grants of \$ 1,416,927) (Revenue \$)

EDUCATION Education is the cornerstone of individual and community success It is essential to getting and keeping a job with a livable wage and health benefits It is also fundamental to a community's economic prosperity a well-educated workforce attracts world-class jobs United Way funds 26 programs at 14 Partner Agencies that focus on education, helping us advance our education goals in the community From addressing youth self-esteem to funding accredited child care centers, United Way is helping children, youth and families reach their potential Just as the strength of the foundation determines the stability of the home, all future learning, behavior and health is based on one's early experiences Our vision is that young people will grow up healthy and ready for the future, that they are prepared for kindergarten, that teenagers build self-esteem and have safe places to go after school, and that parents and guardians have support and education about child development Our Westbrook Children's Project is an example of how we are working to fulfill our vision Focusing initially on children in K-2, two of the goals of the Project are to reduce absenteeism and out-of-classroom referrals, two building blocks to academic success In its first year, there was success in both areas - the number of students who were absent eight or more times decreased by 8 percent and the number of out-of-classroom referrals for behavioral issues decreased by 19 percent The Project had a successful first year Working with schools, community agencies and families, one school experienced an 8% decrease and another achieved a 20% decrease in student absenteeism The same schools saw 19% and 39% decreases, respectively, in out-of-classroom behavior referrals

4c

(Code) (Expenses \$ 1,092,735 including grants of \$ 1,035,013) (Revenue \$)

INCOME Many people in Greater Portland do not have a stable income that allows them to provide the basics - food, rent and utilities United Way has always taken a strategic approach to addressing critical issues and financial stability is no exception Financial stability comes from providing families with the resources and opportunities they need to meet their basic needs and attain affordable housing United Way funds 24 programs at 13 Partner Agencies that focus on income and securing the basics, helping us advance our financial stability goals in the community From addressing the needs of refugees and immigrants to funding armed forces emergency services and legal services programs, United Way is linking community members to tools that will help them get on, or continue down, the path to financial stability Another United Way initiative, CA\$H Greater Portland (Creating Assets, Savings & Hope) is a partnership of community leaders and industry experts focused on helping families and individuals achieve long-term financial stability It does this by offering free tax preparation to qualified filers during tax season, bringing financial education tools to the community and educating hard-working residents about how they can make the most of their money CA\$H connects people to local programs and services and our website www.cashgp.org is a financial education clearing house Individuals who came to CA\$H in 2009 to get their taxes prepared not only saved \$500,000 in income tax filing fees, but they received \$3 1 million in state and federal refunds Those who qualified for it received more than \$700,000 from the Earned Income Tax Credit In addition, all of these individuals were offered access to financial resources to help them work toward their own financial stability

(Code) (Expenses \$ 4,949,299 including grants of \$ 3,789,381) (Revenue \$ 45,351)

4d

Other program services (Describe in Schedule O)

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

4e

Total program service expenses \$ 9,843,412 Must equal Part IX, Line 25, column (B).

Part IV Checklist of Required Schedules

		Yes	No	
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> 	1	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors? 	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i> 	3		No
4	Section 501(c)(3) organizations Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II.</i> 	4	Yes	
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III.</i>	5		
6	Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> 	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? <i>If "Yes," complete Schedule D, Part II.</i>	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> 	8		No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> 	9		No
10	Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V.</i> 	10	Yes	
11	Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable.</i> 	11	Yes	
12	Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII.</i> 	12	Yes	
13	Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i>	13		No
14a	Did the organization maintain an office, employees, or agents outside of the U S?	14a		No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U S? <i>If "Yes," complete Schedule F, Part I.</i>	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II.</i>	15		No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III.</i>	16		No
17	Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I.</i>	17		No
18	Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i>	18		No
19	Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i>	19		No
20	Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H.</i>	20		No
21	Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i> 	21	Yes	
22	Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i> 	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J.</i> 	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b–24d and complete Schedule K. If "No," go to question 25.</i>	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3) and 501(c)(4) organizations Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>	25a		No
b	Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I.</i>	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i>	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III.</i>	27		No

Part IV Checklist of Required Schedules (Continued)

		Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee		
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L, Part IV		No
b	Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV		No
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If "Yes," complete Schedule L, Part IV		No
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations section 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1 	Yes	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 		No
36	501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 		No
37	Did the organization conduct more than 5 percent of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI 		No

Part V

Statements Regarding Other IRS Filings and Tax Compliance

			Yes	No
1a	Enter the number reported in Box 3 of Form 1096, <i>Annual Summary and Transmittal of U.S. Information Returns</i> . Enter -0- if not applicable	1a48		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	Yes	
2a	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return	2a42		
b	If at least one is reported in 2a, did the organization file all required federal employment tax returns? . . . Note: <i>If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return.</i>	2b		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	3a		No
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		No
b	If "Yes," enter the name of the foreign country _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts .			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . . .	5a		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		No
c	If "Yes," to 5a or 5b, did the organization file Form 8886-T, <i>Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction</i> ?	5c		
6a	Did the organization solicit any contributions that were not tax deductible?	6a		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		
7	Organizations that may receive deductible contributions under section 170(c).			
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of \$75 or more?	7a		No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c		No
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . .	7f		No
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	7g	Yes	
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?	7h	Yes	
8	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8		
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.			
a	Did the organization make any taxable distributions under section 4966?	9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		
10	Section 501(c)(7) organizations. Enter			
a	Initiation fees and capital contributions included on Part VIII, line 12	10a		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b		
11	Section 501(c)(12) organizations. Enter			
a	Gross income from members or shareholders	11a		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	11b		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b		

Part VI

Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section A. Governing Body and Management

For each "Yes" response to lines 2-7 below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

1a

Enter the number of voting members of the governing body

1a

28

1b

Enter the number of voting members that are independent

1b

28

2

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

2

Yes

3

Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?

3

No

4

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

4

No

5

Did the organization become aware during the year of a material diversion of the organization's assets?

5

No

6

Does the organization have members or stockholders?

6

Yes

7a

Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?

7a

Yes

7b

Are any decisions of the governing body subject to approval by members, stockholders, or other persons?

7b

Yes

8

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

8a

the governing body?

8a

Yes

8b

each committee with authority to act on behalf of the governing body?

8b

Yes

9a

Does the organization have local chapters, branches, or affiliates?

9a

No

9b

If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?

9b

10

Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990

10

Yes

11

Is there any officer, director or 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

11

No

Section B. Policies

12a

Does the organization have a written conflict of interest policy? If "No", go to line 13

12a

Yes

12b

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

12b

Yes

12c

Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done

12c

Yes

13

Does the organization have a written whistleblower policy?

13

Yes

14

Does the organization have a written document retention and destruction policy?

14

Yes

15

Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision

15a

The organization's CEO, Executive Director, or top management official?

15a

No

15b

Other officers or key employees of the organization?

15b

No

16a

Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?

16a

No

16b

If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable Federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?

16b

Section C. Disclosure

17

List the States with which a copy of this Form 990 is required to be filed _____

18

Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
☐ own website ☒ another's website ☒ upon request

19

Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.

20

State the name, physical address, and telephone number of the person who possesses the books and records of the organization.
UNITED WAY INC
400 CONGRESS STREET
PORTLAND, ME 04112
(207) 874-1000

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

☐ Check this box if the organization did not compensate any officer, director, trustee or key employee

Form **990** (2008)

(A) Name and Title	(B) Average hours per week	(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			
1b Total								276,472	0	43,895

	Yes	No
3		No
4	Yes	
5		No

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization

(A)	(B)	(C)
Name and business address	Description of services	Compensation

2	Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization	0
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Part VIII

Statement of Revenue

				(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514				
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns . . .	1a 73,270								
	b	Membership dues	1b								
	c	Fundraising events	1c								
	d	Related organizations . . .	1d								
	e	Government grants (contributions)	1e								
	f	All other contributions, gifts, grants, and similar amounts not included above	10,218,063					1f			
	g	Noncash contributions included in lines 1a-1f \$ 201,471									
	h	Total (Add lines 1a-1f)	10,291,333								
	Program Service Revenue	2a	WORKSHOPS/TRAINING					Business Code 900,099	51,846	51,846	
b											
c											
d											
e											
f		All other program service revenue									
g		Total. Add lines 2a-2f									
		\$ 51,846									
Other Revenue	3	Investment income (including dividends, interest other similar amounts)		186,448			186,448				
	4	Income from investment of tax-exempt bond proceeds									
	5	Royalties									
	6a	Gross Rents	(i) Real	(ii) Personal							
	b	Less rental expenses									
	c	Rental income or (loss)									
	d	Net rental income or (loss)									
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other							
			1,471,687								
			1,717,195								
			-245,508								
	b	Less cost or other basis and sales expenses			-245,508			-245,508			
	c	Gain or (loss)									
	d	Net gain or (loss)									
	8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18 Attach Schedule G if total exceeds \$15,000	a								
									b	Less direct expenses	b
									c	Net income or (loss) from fundraising events	
	9a	Gross income from gaming activities See part IV, line 19 Complete Schedule G if total exceeds \$15,000	a								
									b	Less direct expenses	b
									c	Net income or (loss) from gaming activities	
	10a	Gross sales of inventory, less returns and allowances	a								
									b	Less cost of goods sold	b
c									Net income or (loss) from sales of inventory		
	Miscellaneous Revenue	Business Code									
11a	MISCELLANEOUS	900,099	236,629	236,629							
b											
c											
d	All other revenue										
e	Total. Add lines 11a-11d										
	\$ 236,629										
12	Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e			10,520,748	288,475	0	-59,060				

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) but are not required to complete columns (B), (C), and (D).					
Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	6,798,399	6,798,399		
2	Grants and other assistance to individuals in the U S See Part IV, line 22	1,177,190	1,177,190		
3	Grants and other assistance to governments, organizations and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	320,118	106,651	144,053	69,414
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	1,351,469	801,965		420,988
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	47,792	31,566		16,226
9	Other employee benefits	123,104	71,536	13,540	38,028
10	Payroll taxes	119,168	72,817	16,005	30,346
11	Fees for services (non-employees)				
a	Management	9,609	5,353	1,276	2,980
b	Legal	19,652	12,394	2,072	5,186
c	Accounting	22,163	113	22,050	
d	Lobbying				
e	Professional fundraising See Part IV, line 17				
f	Investment management fees				
g	Other	263,920	248,341	6,688	8,891
12	Advertising and promotion	275,973	208,955	2,555	64,463
13	Office expenses	118,310	73,457	12,033	32,820
14	Information technology				
15	Royalties				
16	Occupancy	183,018	103,424	23,878	55,716
17	Travel	44,908	27,810	3,977	13,121
18	Payments of travel or entertainment expenses for any Federal, state or local public officials				
19	Conferences, conventions and meetings	41,816	28,486	2,782	10,548
20	Interest				
21	Payments to affiliates	80,722	44,968	10,726	25,028
22	Depreciation, depletion, and amortization	25,383	14,140	3,373	7,870
23	Insurance	17,377	9,602	2,522	5,253
24	Other expenses—Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below)				
a	MISCELLANEOUS	9,560	6,245	985	2,330
b					
c					
d					
e					
f	All other expenses				
25	Total functional expenses. Add lines 1 through 24f	11,049,651	9,843,412	397,031	809,208
26	Joint Costs. Check ☐ if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year		
Assets	1	Cash—non-interest-bearing	1,510	1	21,297	
	2	Savings and temporary cash investments	4,376,756	2	4,325,443	
	3	Pledges and grants receivable, net	3,887,230	3	3,801,930	
	4	Accounts receivable, net	175,207	4	86,255	
	5	Receivables from current and former officers, directors, trustees, key employees or other related parties <i>Complete Part II of Schedule L</i>		5		
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) <i>Complete Part II of Schedule L</i>		6		
	7	Notes and loans receivable, net	198,121	7	192,497	
	8	Inventories for sale or use		8		
	9	Prepaid expenses and deferred charges		9		
	10a	Land, buildings, and equipment cost basis				
		10a	308,457			
	b	Less accumulated depreciation <i>Complete Part VI of Schedule D</i>				
		10b	242,164	85,084	10c	66,293
	11	Investments—publicly traded securities	6,047,906	11	4,918,038	
	12	Investments—other securities See Part IV, line 11 <i>Complete Part VII of Schedule D</i>	1,364,084	12	982,426	
	13	Investments—program-related See Part IV, line 11 <i>Complete Part VIII of Schedule D</i>		13		
14	Intangible assets		14			
15	Other assets See Part IV, line 11 <i>Complete Part IX of Schedule D</i>	102,397	15	76,155		
16	Total assets. Add lines 1 through 15 (must equal line 34)	16,238,295	16	14,470,334		
Liabilities	17	Accounts payable and accrued expenses	472,023	17	400,857	
	18	Grants payable		18		
	19	Deferred revenue		19		
	20	Tax-exempt bond liabilities		20		
	21	Escrow account liability <i>Complete Part IV of Schedule D</i>	129,306	21	105,415	
	22	Payable to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons <i>Complete Part II of Schedule L</i>		22		
	23	Secured mortgages and notes payable to unrelated third parties		23		
	24	Unsecured notes and loans payable		24		
	25	Other liabilities <i>Complete Part X of Schedule D</i>	1,711,973	25	1,884,576	
	26	Total liabilities. Add lines 17 through 25	2,313,302	26	2,390,848	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.					
	27	Unrestricted net assets	5,704,974	27	5,456,267	
	28	Temporarily restricted net assets	5,389,903	28	4,037,403	
	29	Permanently restricted net assets	2,830,116	29	2,585,816	
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.					
	30	Capital stock or trust principal, or current funds		30		
	31	Paid-in or capital surplus, or land, building or equipment fund		31		
	32	Retained earnings, endowment, accumulated income, or other funds		32		
	33	Total net assets or fund balances	13,924,993	33	12,079,486	
	34	Total liabilities and net assets/fund balances	16,238,295	34	14,470,334	

Part XI Financial Statements and Reporting

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ cash ☒ accrual ☐ other		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a	No
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes
c	If "Yes" to lines 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?	2c	Yes
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?	3a	No
b	If "Yes," did the organization undergo the required audit or audits?	3b	

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

To be completed by all section 501(c)(3) organizations and section 4947(a)(1) nonexempt charitable trusts.
Attach to Form 990 or Form 990-EZ. See separate instructions.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization UNITED WAY INC dba UNITED WAY OF GREATER PORTLAND	Employer identification number 01-0241767
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Part I Reason for Public Charity Status (to be completed by all organizations) (See Instructions)

The organization is not a private foundation because it is (Please check only **one** organization)

1	☐	A church, convention of churches, or association of churches described in Section 170(b)(1)(A)(i).
2	☐	A school described in Section 170(b)(1)(A)(ii). (Attach Schedule E)
3	☐	A hospital or a cooperative hospital service organization described in Section 170(b)(1)(A)(iii). (Attach Schedule H)
4	☐	A medical research organization operated in conjunction with a hospital described in Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state
5	☐	An organization operated for the benefit of a college or university owned or operated by a governmental unit described in Section 170(b)(1)(A)(iv). (Complete Part II)
6	☐	A federal, state, or local government or governmental unit described in Section 170(b)(1)(A)(v).
7	☒	An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in Section 170(b)(1)(A)(vi) (Complete Part II)
8	☐	A community trust described in Section 170(b)(1)(A)(vi) (Complete Part II)
9	☐	An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See Section 509(a)(2). (Complete Part III)
10	☐	An organization organized and operated exclusively to test for public safety See Section 509(a)(4). (See instructions)
11	☐	An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See Section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h a ☐ Type I b ☐ Type II c ☐ Type III - Functionally Integrated d ☐ Type III - Other
e	☐	By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)
f	☐	If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box
g	☐	Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons? (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization? (ii) a family member of a person described in (i) above? (iii) a 35% controlled entity of a person described in (i) or (ii) above?
h	☐	Provide the following information about the organizations the organization supports

(i) Name of Supported Organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (See Instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support?
			Yes	No	Yes	No	Yes	No	
Total									

Part II

Support Schedule for Organizations Described in IRC 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.)

Public Support

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	9,733,991	9,998,154	10,377,631	10,624,615	10,218,063	50,952,454
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add line 1-3	9,733,991	9,998,154	10,377,631	10,624,615	10,218,063	50,952,454
5 The portion of total contribution by each person (other than a government unit or publicly supported organization) included on line 1 that exceed 2% of the amount shown on line 11, column (f)						7,688,106
6 Public Support subtract line 5 from line 4						43,264,348

Total Support

Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
7 Amounts from line 4	9,733,991	275,991	10,377,631	10,624,615	10,218,063	50,952,454
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	202,742	275,991	323,404	329,709	186,448	1,318,294
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
11 Total Support (Add lines 7 through 10)						52,270,748
12 Gross receipts from related activities, etc (See instructions)					12	1,335,243

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

Computation of Public Support Percentage

14 Public Support Percentage for 2008 (line 6 column (f) divided by line 11 column (f))	14	82.770 %
15 Public Support Percentage for 2007 Schedule A, Part IV-A, line 26f	15	83.060 %

- 16a 33 1/3% Test - 2008. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization
- b 33 1/3% Test - 2007. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization
- 17a 10% Facts and Circumstances Test - 2008. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization
- b 10% Facts and Circumstances Test - 2007. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization
- 18 Private Foundation. If the organization did not check the box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions

Part IIISupport Schedule for Organizations Described in IRC 509(a)(2)
(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")						
2Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3Gross receipts from activities that are not an unrelated trade or business under section 513						
4Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5The value of services or facilities furnished by a governmental unit to the organization without charge						
6Total Add lines 1-5						
7aAmounts included on lines 1, 2, and 3 received from disqualified persons						
bAmounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
cTotal of lines 7a and 7b						
8Public Support (Subtract line 7c from line 6)						

Total Support						
Calendar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9Amounts from line 6						
10aGross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
bUnrelated business taxable income (less section 511 taxes) from businesses acquired after 30 June, 1975						
cAdd lines 10a and 10b						
11Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						
13Total Support (Add lines 9, 10c, 11 and 12)						
14First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here						

Computation of Public Support Percentage			
15	Public Support Percentage for 2008 (line 8 column (f) divided by line 13 column (f))	15	
16	Public Support Percentage for 2007 Schedule A, Part IV -A, line 27g	16	

Computation of Investment Income Percentage			
17	Investment Income Percentage for 2008 (line 10c column (f) divided by line 13 column (f))	17	
18	Investment Income Percentage from 2007 Schedule A, Part IV -A, line 27h	18	
19a	33 1/3% Tests - 2008. 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% Tests - 2007. 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

Supplemental Information. Complete this part to provide the information required by Part II, line 10; Part II, line 17a or 17b, or Part III, line 12. Provide and any other additional information. (see instructions)

Facts and Circumstances Test

Additional Data

Software ID:

Software Version:

EIN: 01-0241767

Name: UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Form 990, Part VII - Section Aaa

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W- 2/1099MISC)	(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			
CHERYL BASCOMB , DIRECTOR	1 00	X						0	0	0
BETH NEWLANDS CAMPBELL , DIRECTOR	1 00	X						0	0	0
KEVIN CARLETON , DIRECTOR	1 00	X						0	0	0
WILLIAM CARON JR , DIRECTOR	1 00	X						0	0	0
MICHAEL R CURRIE , DIRECTOR	1 00	X						0	0	0
CHRISTOPHER WEMMONS , VICE CHAIR	1 00	X		X				0	0	0
MARK L FASOLD , DIRECTOR	1 00	X						0	0	0
MICHAEL E DUBYAK , DIRECTOR	1 00	X						0	0	0
KEITH C JONES , DIRECTOR	1 00	X						0	0	0
VICTORIA LORING , TREASURER	1 00	X		X				0	0	0
DAVID MENTION , DIRECTOR	1 00	X						0	0	0
LAUREL MILOS , DIRECTOR	1 00	X						0	0	0
JUDITH AUSTIN , DIRECTOR	1 00	X						0	0	0
REV KENNETH I LEWIS J , DIRECTOR	1 00	X						0	0	0
JUDY LUCAS , DIRECTOR	1 00	X						0	0	0
HENRY ROY PARTRIDGE JR , DIRECTOR	1 00	X						0	0	0
BRIAN S PETROVEK , CHAIR	1 00	X		X				0	0	0
SAM NOVICK , DIRECTOR	1 00	X						0	0	0
MICHAEL R STODDARD , DIRECTOR	1 00	X						0	0	0
BRENDA GARRAND , DIRECTOR	1 00	X						0	0	0
DEVINDER MALHOTRA , DIRECTOR	1 00	X						0	0	0
STEVEN THAXTON , DIRECTOR	1 00	X						0	0	0
MICHAEL SIMONDS , DIRECTOR	1 00	X						0	0	0
ALBERT G SWALLOW III , DIRECTOR	1 00	X						0	0	0
BARBARA WHEATON ESQ , DIRECTOR	1 00	X						0	0	0
GRACE VALENZUELA , DIRECTOR	1 00	X						0	0	0
RICHARD W PETERSEN , DIRECTOR	1 00	X						0	0	0
THOMAS ZUKE , DIRECTOR	1 00	X						0	0	0
MEG BAXTER , PRESIDENT	40 00			X				179,577	0	32,985
MICHAEL BEVILACQUA , CFO & COO	40 00			X				96,895	0	10,910

Form 990, Part III, Line 1 - Briefly describe the organization's mission:

United Way of Greater Portland improves people's lives by mobilizing the caring power of our communities. We work to achieve community-wide change that improves the Education, Income and Health of Greater Portland residents. To these ends, we -Educate the community and raise resources to address the most pressing human care needs -Provide funding, technical assistance, volunteer resources, and a wide range of support to strengthen the capacity of our nonprofit partners to address community needs -Convene and work side by side with individuals, nonprofits, government, businesses, and other community partners. -Create, fund and replicate initiatives that improve the quality of life for individuals and families -Work with policy makers and advocates on important issues around education, income and health

SCHEDULE C

(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

To be completed by organizations described below. Attach to Form 990 or Form 990-EZ

OMB No 1545-0047

2008

Open to Public Inspection

If the organization answered “Yes,” to Form 990, Part IV, Line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities)

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

If the organization answered “Yes,” to Form 990, Part IV, Line 4, or Form 990EZ, Part VI, line 47 (Lobbying Activities)

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

If the organization answered “Yes,” to Form 990, Part IV, Line 5 (Proxy Tax)

- Section 501(c)(4), (5), or (6) organizations complete Part III

Name of the organization UNITED WAY INC dba UNITED WAY OF GREATER PORTLAND	Employer identification number 01-0241767
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Part I-A To be completed by all organizations exempt under section 501(c) and section 527 organizations. (See the instructions for Schedule C for details.)

- 1

Provide a description of the organization's direct and indirect political campaign activities in Part IV
- 2

Political expenditures

\$
- 3

Volunteer hours

Part I-B To be completed by all organizations exempt under section 501(c)(3). (See the instructions for Schedule C for details.)

- 1

Enter the amount of any excise tax incurred by the organization under section 4955

\$
- 2

Enter the amount of any excise tax incurred by organization managers under section 4955

\$
- 3

If the organization incurred in a section 4955 tax, did it file Form 4720 for this year?

☐ Yes

☐ No
- 4a

Was a correction made?

☐ Yes

☐ No
- b

If "Yes," describe in Part IV

Part I-C To be completed by all organizations exempt under section 501(c), except section 501(c)(3). (See the instructions for Schedule C for details.)

- 1

Enter the amount directly expended by the filing organization for section 527 exempt function activities

\$
- 2

Enter the amount of the filing organization's internal funds contributed to other organizations for section 527 exempt funtion activities

\$
- 3

Total of direct and indirect exempt function expenditures. Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b

\$
- 4

Did the filing organization file **Form 1120-POL** for this year?

☐ Yes

☐ No
- 5

State the names, addresses and Employer Identification Number (EIN) of all section 527 political organizations to which payments were made. Enter the amount paid and indicate if the amount was paid from the filing organization's own internal funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV

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

Part II-A

To be completed by organizations exempt under section 501(c)(3) that filed Form 5768 (election under section 501(h)). (See the instructions for Schedule C for details.)

A

Check

☐

if the filing organization belongs to an affiliated group

B

Check

☐

if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures— (The term "expenditures" means amounts paid or incurred.)		(a) Filing Organization's Totals	(b) Affiliated Group Totals
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)			
b Total lobbying expenditures to influence a legislative body (direct lobbying)			8,124
c Total lobbying expenditures (add lines 1a and 1b)			8,124
d Other exempt purpose expenditures			9,570,779
e Total exempt purpose expenditures (add lines 1c and 1d)			9,578,903
f Lobbying nontaxable amount Enter the amount from the following table in both columns— If the amount on line 1e, column (a) or (b) is:			628,945
The lobbying nontaxable amount is:			
Not over \$500,000			
Over \$500,000 but not over \$1,000,000			
Over \$1,000,000 but not over \$1,500,000			
Over \$1,500,000 but not over \$17,000,000			
Over \$17,000,000			
g Grassroots nontaxable amount (enter 25% of line 1f)			157,236
h Subtract line 1g from line 1a Enter -0- if line g is more than line a			0
i Subtract line 1f from line 1c Enter -0- if line f is more than line c			0
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		☐ Yes ☐ No	

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 1a through 1f of the instructions.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) Total
2a Lobbying non-taxable amount	566,686	600,159	607,666	628,945	2,403,456
b Lobbying ceiling amount (150% of line 2a, column(e))					3,605,184
c Total lobbying expenditures	7,308	7,410	7,889	8,124	30,731
d Grassroots non-taxable amount	141,672	150,040	151,917	157,236	600,865
e Grassroots ceiling amount (150% of line d, column (e))					901,298
f Grassroots lobbying expenditures					

Part II-B To be completed by organizations exempt under section 501(c)(3) that have NOT filed Form 5768 (election under section 501(h)). (See the instructions for Schedule C for details.)

		(a)		(b)
		Yes	No	Amount
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of			
a	Volunteers?			
b	Paid staff or management (include compensation in expenses reported on lines c through i)?			
c	Media advertisements?			
d	Mailings to members, legislators, or the public?			
e	Publications, or published or broadcast statements?			
f	Grants to other organizations for lobbying purposes?			
g	Direct contact with legislators, their staffs, government officials, or a legislative body?			
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?			
i	Other activities If "Yes," describe in Part IV			
j	Total lines 1c through 1i			
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b	If "Yes" enter the amount of any tax incurred under section 4912			
c	If "Yes" enter the amount of any tax incurred by organization managers under section 4912			
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6). (See the instructions for Schedule C for details.)

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

Part III-B To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" OR if Part III-A, question 3 is answered "Yes." (See the instructions for Schedule C for details.)

1	Dues, assessments and similar amounts from members	1 \$
2	Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).	
a	Current Year	2a \$
b	Carryover from last year	2b \$
c	Total	2c \$
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3 \$
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4 \$
5	Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4)	5 \$

Part IV Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i. Also, complete this part for any additional information.

Identifier	Return Reference	Explanation

Supplemental Information

Identifier	Return Reference	Explanation
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SCHEDULE D
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2008

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

Name of the organization UNITED WAY INC dba UNITED WAY OF GREATER PORTLAND	Employer identification number 01-0241767
--	--

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

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	
2	Aggregate Contributions to (during year)	
3	Aggregate Grants from (during year)	
4	Aggregate value at end of year	
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes☐ No	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? ☐ Yes☐ No	

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

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)☐ Preservation of an historically importantly land area
☐ Protection of natural habitat☐ Preservation of certified historic structure
☐ Preservation of open space

2

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

	Held at the End of the Year
a	Total number of conservation easements
b	Total acreage restricted by conservation easements
c	Number of conservation easements on a certified historic structure included in (a)
d	Number of conservation easements included in (c) acquired after 8/17/06

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4

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

5

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

☐ Yes☐ No

6

Staff or volunteer hours devoted to monitoring, inspecting and enforcing easements during the year ▶

7

Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$

8

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

☐ Yes☐ No

9

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

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

1a

If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1▶ \$

(ii) Assets included in Form 990, Part X▶ \$

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a

Revenues included in Form 990, Part VIII, line 1▶ \$

b

Assets included in Form 990, Part X▶ \$

Part III

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

3

Using the organization's 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 XIV

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

Trust, Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to 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 why in Part XIV and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21?

☒ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to 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	6,051,730			
b	Contributions	7,707			
c	Investment earnings or losses	-1,056,186			
d	Grants or scholarships	14,334			
e	Other expenditures for facilities and programs	145,429			
f	Administrative expenses	32,083			
g	End of year balance	4,811,405			

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶ 55 000 %

b

Permanent endowment ▶ 45 000 %

c

Term endowment ▶ 0 %

3a

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

(i)

unrelated organizations

3a(i)

Yes

(ii)

related organizations

3a(ii)

Yes

b

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

3b

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		308,457	242,164	66,293
e Other				
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				66,293

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other BENEFICIAL INTEREST IN PERPETUAL TRUST	967,441	F
Other OTHER	14,985	F
Total. (Column (b) should equal Form 990, Part X, col (B) line 12) ▶	982,426	

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. (Column (b) should equal Form 990, Part X, col (B) line 13)		

(a) Description	(b) Book value
Total. (Column (b) should equal Form 990, Part X, col.(B) line 15.)	

(a) Description of Liability	(b) Amount
Federal Income Taxes	
DESIGNATIONS PAYABLE	1,884,576
Total. (Column (b) should equal Form 990, Part X, col (B) line 25)	1,884,576

Schedule D (Form 990) 2008

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements		
1	Total revenue (Form 990, Part VIII, column (A), line 12)	110,520,748
2	Total expenses (Form 990, Part IX, column (A), line 25)	11,049,651
3	Excess or (deficit) for the year Subtract line 2 from line 1	-528,903
4	Net unrealized gains (losses) on investments	-1,186,737
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV)	-129,867
9	Total adjustments (net) Add lines 4 - 8	-1,316,604
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	-1,845,507

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return		
1	Total revenue, gains, and other support per audited financial statements	19,165,641
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12	
a	Net unrealized gains on investments2a	
b	Donated services and use of facilities2b	
c	Recoveries of prior year grants2c	
d	Other (Describe in Part XIV)2d	
e	Add lines 2a through 2d2e	0
3	Subtract line 2e from line 13	9,165,641
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1	
a	Investment expenses not included on Form 990, Part VIII, line 7b4a	
b	Other (Describe in Part XIV)4b	
c	Add lines 4a and 4b4c	1,355,107
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)5	10,520,748

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return		
1	Total expenses and losses per audited financial statements	11,011,148
2	Amounts included on line 1 but not on Form 990, Part IX, line 25	
a	Donated services and use of facilities2a	
b	Prior year adjustments2b	
c	Losses reported on Form 990, Part IX, line 252c	
d	Other (Describe in Part XIV)2d	
e	Add lines 2a through 2d2e	1,432,245
3	Subtract line 2e from line 13	9,578,903
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:	
a	Investment expenses not included on Form 990, Part VIII, line 7b4a	
b	Other (Describe in Part XIV)4b	
c	Add lines 4a and 4b4c	1,470,748
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)5	11,049,651

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part XIV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b

Identifier	Return Reference	Explanation
Part IV, Line 2b		United Way Inc holds an endowment for the benefit of Preble Street, a social service agency that provides services to people experiencing problems with homelessness, housing, hunger, and poverty Income from the endowment is to be used by Preble Street to promote and support self sufficiency of the individuals and families it serves
Part V, Line 4	Description of Intended Use of Endowment Funds	Income from the United Way's endowment is used to support the mission of United Way
Part XI, Line 8 - Other Adjustments		DONOR DESIGNATION ADJUSTMENT -129867
Part XII, Line 4b - Other Adjustments		DONOR DESIGNATED CONTRIBUTIONS 1600615 REALIZED LOSS ON INVESTMENTS -245508
Part XIII, Line 2d - Other Adjustments		REALIZED & UNREALIZED LOSSES 1432245
Part XIII, Line 4b - Other Adjustments		DONOR DESIGNATED GRANTS & AWARDS 1470748

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Grants and Other Assistance to Organizations,
Governments and Individuals in the U.S.

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

OMB No 1545-0047

2008

Open to Public
Inspection

Employer identification number
01-0241767

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 Governments and Organizations in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 if additional space is needed.

☐

1(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2

Enter total number of section 501(c)(3) and government organizations

130

3

Enter total number of other organizations

0

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22.
Use Schedule I-1 (Form 990) 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 non-cash assistance
SUMMERCHAMPS (LIBRA) CAMP SCHOLARSHIPS	1546	1,166,742			
HIGGINS SCHOLARSHIPS	10	10,448			

Part IV

Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.
See Additional Data Table

Identifier	Return Reference	Explanation
Procedure for Monitoring Grants in the U S	Part I, Line 2	Schedule I, Part I, Line 2 Allocations Organizations receiving discretionary funding from United Way of Greater Portland undergo an intensive pre-screening process before being awarded funding United Way of Greater Portland utilizes teams of community volunteers working in conjunction with staff to conduct this Community Investment review process, which includes a paper application and in-person review meeting To be considered for funding, applicant organizations must meet basic certification standards, including verification of current status as an IRS Code Section 501(c)(3) nonprofit organization Applicant agencies are required to Explain the proposed use of United Way funding and demonstrate results (client outcomes)of funding Submit agency and program-level budgets and annual audits to demonstrate financial stability, and adherence to sound fiscal policies and management practices United Way of Greater Portland requires that all funded organizations sign a funding contract agreeing to all general provisions of the funding relationship, reporting requirements and compliance with applicable state and federal regulations such as the USA Patriot Act Community Impact staff regularly communicate with and monitor funded organizations via annual interim reports submitted between scheduled full reviews Interim reports demonstrate how funding has been utilized to date and the client outcomes achieved as a result of funding Interim reports provide information on major programmatic or financial changes to the agency that might impact its ability to deliver agreed-upon client outcomes Completion and submission of satisfactory interim reports are a requirement of continued funding Designations Organizations receiving donor designated contributions through United Way undergo screening prior to distribution of funding Such screening includes certification that the organization, 1) is a non-profit under IRS code section 501(c)(3), 2) provides health and human services, 3) is not fraternal, political or religious in nature In addition, organizations must provide verification of compliance with the USA Patriot Act

Software ID:

Software Version:

EIN: 01-0241767

Name: UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
A Company of GirlsPO Box 7527 Portland, ME 04112	05-0631726	501(C)(3)	45,349				Partner Agency Allocation
American Cancer Society1 Bowdoin Mill Island Topsham, ME 04086	13-1788491	501(C)(3)	73,090				Partner Agency Allocation
American Red Cross2401 Congress Street Portland, ME 04102	01-0215209	501(C)(3)	145,078				Partner Agency Allocation
AmistadPO Box 992 Portland, ME 04104	01-0500860	501(C)(3)	42,034				Partner Agency Allocation
Big BrothersBig Sisters of Southern Maine195 Lancaster Street Portland, ME 04101	01-0475146	501(C)(3)	47,711				Partner Agency Allocation
Boys & Girls Clubs of Southern MainePO Box 7830 Portland, ME 04112	01-0211543	501(C)(3)	335,090				Partner Agency Allocation
Catherine Morrill Day Nursery96 Danforth Street Portland, ME 04101	01-0211542	501(C)(3)	79,474				Partner Agency Allocation
Catholic Charities ME CounselingPO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	16,433				Partner Agency Allocation
Catholic Charities ME Home & Family ServicesPO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	89,297				Partner Agency Allocation
Catholic Charities ME Refugee & Immigration ServicesPO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	23,988				Partner Agency Allocation

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
Catholic Charities ME St Elizabeth's Child Development CenterPO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	48,504				Partner Agency Allocation
Catholic Charities ME Support & Recovery ServicesPO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	60,184				Partner Agency Allocation
Center for Grieving ChildrenPO Box 1438 Portland, ME 04104	01-0431501	501(C)(3)	41,067				Partner Agency Allocation
Community Counseling Center343 Forest Avenue Portland, ME 04101	01-0288362	501(C)(3)	362,576				Partner Agency Allocation
Community Dental - Portland276 Canco Road Portland, ME 04103	23-7129502	501(C)(3)	147,034				Partner Agency Allocation
Community Partners Inc 66 Pearl St Portland, ME 04101	01-0351501	501(C)(3)	21,730				Partner Agency Allocation
Cumberland County YMCAPO Box 1078 70 Forest Avenue Portland, ME 04104	01-0211568	501(C)(3)	217,174				Partner Agency Allocation
Day One525 Main Street South Portland, ME 04106	01-0322532	501(C)(3)	175,423				Partner Agency Allocation
Family Crisis ServicesPO Box 704 Portland, ME 04104	01-0352636	501(C)(3)	92,211				Partner Agency Allocation
Frannie Peabody Center 335 Valley Street Portland, ME 04102	01-0416974	501(C)(3)	40,584				Partner Agency Allocation

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Freeport Community Services53 Depot Road PO Box 119 Freeport, ME 04032	01-0332769	501(C)(3)	14,463				Partner Agency Allocation
Girl Scouts of Maine138 Gannett Drive PO Box 9421 280 South Portland, ME 04116	01-0269802	501(C)(3)	37,793				Partner Agency Allocation
Goodwill Industries of Northern New EnglandPO Box 8600 353 Cumberland Ave Portland, ME 04104	01-0284340	501(C)(3)	89,752				Partner Agency Allocation
HomeHealth Visiting Nurses of Southern ME15 Industrial Park Road Saco, ME 04072	23-7204938	501(C)(3)	95,957				Partner Agency Allocation
Immigration Legal Advocacy ProjectPO Box 17917 Portland, ME 04112	22-3260883	501(C)(3)	30,000				Partner Agency Allocation
Iris Network189 Park Avenue Portland, ME 04101	01-0196359	501(C)(3)	23,043				Partner Agency Allocation
Kids First Center222 St John Street Suite 101 Portland, ME 04102	22-2993035	501(C)(3)	19,411				Partner Agency Allocation
Legal Services for the Elderly5 Wabon Street Augusta, ME 043307040	01-0359131	501(C)(3)	39,376				Partner Agency Allocation
MAPS Shelter Services Portland107 India Street Portland, ME 04101	01-0348849	501(C)(3)	21,883				Partner Agency Allocation
Mission Possible755 Main Street Westbrook, ME 04092	01-0509578	501(C)(3)	32,123				Partner Agency Allocation

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Morrison Developmental Center331 Veranda Street Portland, ME 04103	01-0243254	501(C)(3)	70,580				Partner Agency Allocation
Northeast Hearing & Speech75 West Commercial Street Suite 205 205 Portland, ME 04101	01-0228262	501(C)(3)	88,010				Partner Agency Allocation
Northern New England Poison Center22 Bramhall Street Portland, ME 04102	01-0238552	501(C)(3)	18,423				Partner Agency Allocation
Peaks Island Children's WorkshopPO Box 80 Peaks Island, ME 04108	01-0482767	501(C)(3)	42,042				Partner Agency Allocation
Peoples Regional Opportunity Program510 Cumberland Avenue Portland, ME 04101	01-0274725	501(C)(3)	210,393				Partner Agency Allocation
Pine Tree LegalPO Box 547 88 Federal Street Portland, ME 04112	01-0279387	501(C)(3)	93,531				Partner Agency Allocation
Preble Street18 Portland Street PO Box 1459 Portland, ME 04104	01-0418917	501(C)(3)	353,174				Partner Agency Allocation
Regional Transportation Program127 St John Street Portland, ME 04102	01-0339851	501(C)(3)	73,692				Partner Agency Allocation
Salvation ArmyPO Box 3575 Portland, ME 04104	13-5662351	501(C)(3)	104,205				Partner Agency Allocation
Serenity House30 Mellen Street Portland, ME 04101	01-0426638	501(C)(3)	22,384				Partner Agency Allocation

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Sexual Assault Response ServicesPO Box 1371 Portland, ME 04104	01-0343943	501(C)(3)	36,199				Partner Agency Allocation
Shalom House Inc106 Gilman Street PO Box 560 Portland, ME 04112	23-7119236	501(C)(3)	55,516				Partner Agency Allocation
Tri-County Mental Health ServicesP O Box 2008 1155 Lisbon St Lewiston, ME 04241	01-0316813	501(C)(3)	25,508				Partner Agency Allocation
Wayside Soup KitchenPO Box 1278 Portland, ME 04104	22-2806424	501(C)(3)	32,841				Partner Agency Allocation
Youth & Family Outreach331 Cumberland Avenue Portland, ME 04101	22-2806424	501(C)(3)	40,148				Partner Agency Allocation
Youth Alternatives Ingraham50 Lydia Lane South Portland, ME 04106	01-0316041	501(C)(3)	335,666				Partner Agency Allocation
Cumberland County YMCAPO Box 1078 70 Forest Avenue Portland, ME 04104	01-0211568	501(C)(3)	5,000				Let's Go! School/Community Mini-Grants
Falmouth Conservation Corps451 Blackstrap Road Falmouth, ME 04105	01-6000161	501(C)(3)	5,000				Let's Go! School/Community Mini-Grants
Westbrook School Department117 Stroudwater Street Westbrook, ME 04092	01-6000038	Government	8,500				Let's Go! School/Community Mini-Grants
Aroostook County Action Program771 Main Street Presque Isle, ME 04769	01-0315849	501(C)(3)	26,783				Emergency Heating/Food Assistance

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
City of South Portland25 Cottage Road South Portland, ME 04106	01-6000036	501(C)(3)	15,000				Emergency Heating/Food Assistance
Coastal Economic Development Corp34 Wing Farm Parkway Bath, ME 04530	01-0315732	501(C)(3)	12,897				Emergency Heating/Food Assistance
Community ConceptsPO Box 278 South Paris, ME 04281	01-0424969	501(C)(3)	31,494				Emergency Heating/Food Assistance
Heritage United Way228 Maple Street 4th Floor Manchester, NH 03103	02-0225575	501(C)(3)	15,179				Emergency Heating/Food Assistance
Hour Exchange Portland85 Grant Street Portland, ME 04101	01-0496955	501(C)(3)	5,000				Emergency Heating/Food Assistance
Kennebec Valley Community Action Program97 Water Street Waterville, ME 04901	01-0277678	501(C)(3)	37,205				Emergency Heating/Food Assistance
Penquis CAP IncPO Box 1162 Bangor, ME 04401	01-6023748	501(C)(3)	45,119				Emergency Heating/Food Assistance
Peoples Regional Opportunity Program510 Cumberland Avenue Portland, ME 04101	01-0274725	501(C)(3)	73,840				Emergency Heating/Food Assistance
Preble Street18 Portland Street PO Box 1459 Portland, ME 04104	01-0418917	501(C)(3)	114,019				Emergency Heating/Food Assistance
United Way of Androscoggin CountyPO Box 888 Lewiston, ME 04243	01-0211564	501(C)(3)	36,185				Emergency Heating/Food Assistance

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
United Way of Aroostook County480 Main Street 3rd Floor Presque Isle, ME 04769	23-7147455	501(C)(3)	29,994				Emergency Heating/Food Assistance
United Way of Eastern Maine24 Springer Drive Suite 201 Bangor, ME 04401	01-0211478	501(C)(3)	74,178				Emergency Heating/Food Assistance
United Way of Kennebec Valley331 Water Street Suite 5 Augusta, ME 04330	01-6004404	501(C)(3)	23,939				Emergency Heating/Food Assistance
United Way of Mid-Coast Maine34 Wing Farm Parkway Ste 201 Bath, ME 04530	01-6004866	501(C)(3)	30,854				Emergency Heating/Food Assistance
United Way of Mid-Maine PO Box 91 Waterville, ME 04901	01-0233280	501(C)(3)	9,169				Emergency Heating/Food Assistance
United Way of Oxford CountyPO Box 291 South Paris, ME 04281	01-0450352	501(C)(3)	20,197				Emergency Heating/Food Assistance
United Way of Tri-Valley PO Box 126 Farmington, ME 04938	01-0377559	501(C)(3)	7,867				Emergency Heating/Food Assistance
United Way of York CountyPO Box 727 Kennebunk, ME 04043	01-0276862	501(C)(3)	37,704				Emergency Heating/Food Assistance
Waldo Community Action PartnersPO Box 130 Belfast, ME 049150130	01-6020566	501(C)(3)	10,990				Emergency Heating/Food Assistance
Washington Hancock Community ActionPO Box 280 Milbridge, ME 04658	52-0817684	501(C)(3)	24,139				Emergency Heating/Food Assistance

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Western Maine Community ActionPO Box 200 East Wilton, ME 04234	01-0275156	501(C)(3)	9,219				Emergency Heating/Food Assistance
York County Community ActionPO Box 72 Sanford, ME 04073	01-6020406	501(C)(3)	17,472				Emergency Heating/Food Assistance
Center for African Heritage68 High Street Portland, ME 04101	76-0802815	501(C)(3)	5,000				Diversity & Inclusion grants
Center for Grieving ChildrenPO Box 1438 Portland, ME 04104	01-0431501	501(C)(3)	7,500				Diversity & Inclusion grants
Literacy Volunteers of Maine142 High Street Suite 526 Portland, ME 04101	20-0896943	501(C)(3)	6,345				Diversity & Inclusion grants
City of Portland- Freedom TrailPO Box 342 Portland, ME 04112	01-6000032	Government	5,000				Diversity & Inclusion grants
Woodfords Family ServicesPO Box 1768 Portland, ME 04104	01-0278395	501(C)(3)	5,000				Diversity & Inclusion grants
A Company of GirlsPO Box 7527 Portland, ME 04112	05-0631726	501(C)(3)	6,454				Donor Designations
American Cancer Society Northern New England Region1 Bowdoin Mill Island Topsham, ME 04086	13-1788491	501(C)(3)	46,277				Donor Designations
American Heart Association Cumberland County51 US Route One Suite M Scarborough, ME 04074	13-5613797	501(C)(3)	10,960				Donor Designations

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
American Lung Association - ME122 State St Augusta, ME 04330	06-0646594	501(C)(3)	32,583				Donor Designations
American Red Cross of Southern Maine2401 Congress Street Portland, ME 04102	01-0215209	501(C)(3)	29,380				Donor Designations
Big Brothers Big Sisters of Southern Maine195 Lancaster Street Portland, ME 04101	01-0475146	501(C)(3)	28,979				Donor Designations
Boy Scouts of America-Pine Tree Council131 Johnson Road Portland, ME 04102	01-0211490	501(C)(3)	22,879				Donor Designations
Boys & Girls Clubs of Southern MainePO Box 7830 Portland, ME 04112	01-0211543	501(C)(3)	28,386				Donor Designations
Cancer Community Center778 Main Street South Portland, ME 04106	01-0513301	501(C)(3)	25,419				Donor Designations
Caring Resources for Living - North Yarmouth 1018 North Road North Yarmouth, ME 04097	20-0868716	501(C)(3)	8,074				Donor Designations
Catholic Charities Maine PO Box 10660 Portland, ME 04104	01-0228225	501(C)(3)	29,712				Donor Designations
Center for Grieving ChildrenPO Box 1438 Portland, ME 04104	01-0431501	501(C)(3)	72,524				Donor Designations
Community Counseling Center343 Forest Avenue Portland, ME 04101	01-0288362	501(C)(3)	5,472				Donor Designations

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Cumberland County YMCAPO Box 1078 70 Forest Avenue Portland, ME 04104	01-0211568	501(C)(3)	7,062				Donor Designations
Day One525 Main Street South Portland, ME 04106	01-0322532	501(C)(3)	17,610				Donor Designations
Family Crisis ServicesPO Box 704 Portland, ME 04104	01-0352636	501(C)(3)	11,665				Donor Designations
Frannie Peabody Center 335 Valley Street Portland, ME 04102	01-0416974	501(C)(3)	17,897				Donor Designations
Freeport Community Services53 Depot Road PO Box 119 Freeport, ME 04032	01-0332769	501(C)(3)	18,526				Donor Designations
Girl Scouts of Maine138 Gannett Drive PO Box 9421 280 South Portland, ME 04116	01-0269802	501(C)(3)	12,515				Donor Designations
Good Shepherd Food Bank PO Box 1807 Auburn, ME 04211	22-2986809	501(C)(3)	6,849				Donor Designations
Goodwill Industries of Northern New EnglandPO Box 8600 353 Cumberland Ave Portland, ME 04104	01-0284340	501(C)(3)	5,052				Donor Designations
Independent Transportation Network 90 Bridge Street Westbrook, ME 04092	01-0504322	501(C)(3)	5,419				Donor Designations
Iris Network189 Park Avenue Portland, ME 04101	01-0196359	501(C)(3)	14,271				Donor Designations

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Kidney Foundation of Maine470 Forest Avenue Suite 302 Portland, ME 04101	13-1673104	501(C)(3)	7,832				Donor Designations
Kids First Center222 St John Street Suite 101 Portland, ME 04102	22-2993035	501(C)(3)	9,864				Donor Designations
MAPS Shelter Services Portland107 India Street Portland, ME 04101	01-0348849	501(C)(3)	5,692				Donor Designations
Mercy Hospital144 State St Portland, ME 04101	01-0211534	501(C)(3)	5,267				Donor Designations
Morrison Developmental Center331 Veranda Street Portland, ME 04103	01-0243254	501(C)(3)	9,807				Donor Designations
National Multiple Sclerosis Society - Maine Chapter170 US Route 1 Suite 200 Falmouth, ME 04105	01-0240130	501(C)(3)	8,201				Donor Designations
Peoples Regional Opportunity Program510 Cumberland Avenue Portland, ME 04101	01-0274725	501(C)(3)	19,883				Donor Designations
Planned Parenthood of Northern NE51 US Route 1 Suite C Scarborough, ME 04074	03-0222941	501(C)(3)	47,472				Donor Designations
Preble Street18 Portland Street PO Box 1459 Portland, ME 04104	01-0418917	501(C)(3)	51,666				Donor Designations
Root Cellar94 Washington Ave Portland, ME 04101	22-0990667	501(C)(3)	18,131				Donor Designations

Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code 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
Salvation ArmyPO Box 3575 Portland, ME 04104	13-5662351	501(C)(3)	27,898				Donor Designations
Sexual Assault Response Services of Southern MainePO Box 1371 Portland, ME 04104	01-0343943	501(C)(3)	9,458				Donor Designations
Shalom House Inc106 Gilman Street PO Box 560 Portland, ME 04112	23-7119236	501(C)(3)	9,656				Donor Designations
Susan Curtis Foundation1321 Washington Ave Suite 104 Portland, ME 04103	01-0324705	501(C)(3)	6,398				Donor Designations
United Way of Androscoggin CountyPO Box 888 Lewiston, ME 04243	01-0211564	501(C)(3)	111,698				Donor Designations
United Way of Aroostook County480 Main Street 3rd Floor Presque Isle, ME 04769	23-7147455	501(C)(3)	39,945				Donor Designations
United Way of Eastern Maine24 Springer Drive Suite 201 Bangor, ME 04401	01-0211478	501(C)(3)	59,377				Donor Designations
United Way of Kennebec Valley331 Water Street Suite 5 Augusta, ME 04330	01-6004404	501(C)(3)	25,695				Donor Designations
United Way of Mid Coast Maine34 Wing Farm Parkway Ste 201 Bath, ME 04530	01-6004866	501(C)(3)	117,136				Donor Designations
United Way of Mid MainePO Box 91 Waterville, ME 04901	01-0233280	501(C)(3)	34,940				Donor Designations

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) A mount of cash grant	(e) A mount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
United Way of Oxford CountyPO Box 291 South Paris,ME 04281	01-0450352	501(C)(3)	17,786				Donor Designations
United Way of Tri-Valley PO Box 126 Farmington,ME 04938	01-0377559	501(C)(3)	10,030				Donor Designations
United Way of York CountyPO Box 727 Kennebunk,ME 04043	01-0276862	501(C)(3)	78,157				Donor Designations
Wayside Soup KitchenPO Box 1278 Portland,ME 04104	22-2806424	501(C)(3)	19,642				Donor Designations
Youth Alternatives Ingraham50 Lydia Lane South Portland,ME 04106	01-0316041	501(C)(3)	13,426				Donor Designations
2-1-1 Maine IncPO Box 15200 Portland,ME 041125200	30-0194364	501(C)(3)	255,000				Information & referral grant
Peoples Regional Opportunity Program510 Cumberland Avenue Portland,ME 04101	01-0274725	501(C)(3)	17,178				Westbrook Children's Project
Portland Seaman's Friend SocietyLewis Street Westbrook,ME 04092	01-0211545	501(C)(3)	56,000				How Fund Support to Indigent Seamen
State YMCA of Maine305 Winthrop Center Road Winthrop,ME 04364	01-0186800	501(C)(3)	8,900				Gorman Fund support
Maine Community Foundation Inc245 Main Street Ellsworth,ME 04605	01-0391479	501(C)(3)	15,000				Non-profit vialbility clinic grant

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2008

Open to Public Inspection

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

► Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

Name of the organization
UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Employer identification number

01-0241767

Part I

Questions Regarding Compensation

	Yes	No
1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. ☐ First class or charter travel ☐ Travel for companions ☐ Tax idemnification and gross-up payments ☐ Discretionary spending account ☐ Housing allowance or residence for personal use ☐ Payments for business use of personal residence ☐ Health or social club dues or initiation fees ☐ Personal services (e.g., maid, chauffeur, chef)		
b If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all 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 officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	2	
3 Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply. ☒ Compensation committee ☒ Independent compensation consultant ☒ Form 990 of other organizations ☐ Written employment contract ☒ Compensation survey or study ☒ Approval by the board or compensation committee		
4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a: a Receive a severance payment or change of control payment? b Participate in, or receive payment from, a supplemental nonqualified retirement plan? c Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.	4a 4b 4c	No Yes No
501(c)(3) and 501(c)(4) organizations only must complete lines 5-8. 5 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of: a The organization? b Any related organization? If "Yes," to line 5a or 5b, describe in Part III.	5a 5b	No No
6 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of: a The organization? b Any related organization? If "Yes," to line 6a or 6b, describe in Part III.	6a 6b	No No
7 For persons listed in form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III.	7	No
8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III.	8	No

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in 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 are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
MEG BAXTER	(i)	150,000		29,577	24,846	8,139	212,562	
	(ii)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Non-Cash Contributions

To be completed by organizations that answered
"Yes" on Form 990, Part IV, lines 29 or 30.
Attach to Form 990

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Employer identification number

01-0241767

Part I Types of Property

	(a) Check if applicable	(b) Number of Contributions	(c) Revenues reported on Form 990, Part VIII, line 1g	(d) Method of determining revenues
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	51	201,471	
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 (describe _____)				
26 Other (describe _____)				
27 Other (describe _____)				
28 Other (describe _____)				

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 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?	30a	No
b If "Yes", describe the arrangement in Part II		
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?	31	Yes
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell non-cash contributions?	32a	No
b If "Yes", describe in Part II		
33 If the organization did not report revenues in Column (c) for a type of property for which Column (a) is checked, describe in Part II		

[illegible]

SCHEDULE O

(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ **Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.**

OMB No 1545-0047

2008

Open to Public
Inspection

Name of the organization UNITED WAY INC dba UNITED WAY OF GREATER PORTLAND	Employer identification number 01-0241767
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Identifier	Return Reference	Explanation
Form 990, Part III, line 4d	Other Program Services	SUMMER CHAMPS A summer camp experience is one no child is likely to forget because going to camp provides adventure and the opportunity to learn new skills, builds self-confidence and independence, and creates opportunities to make new friends United Way, through funds generously donated by the Libra Foundation, administers a program called Summer Champs that provides students in the Portland Public School system in grades four, five and six \$500 scholarships to attend summer camp in Maine Through the Maine camp experience, kids are connected with nature, the arts, music, sports and many other experiences that help them grow into happy, motivated adults In its ninth year in 2009, 1,090 students attended summer camp through the Summer Champs program In total, 13,616 camp experiences have been enjoyed over the past nine years KEEP ME WARM/FOOD FOR ME Staying warm with a roof overhead and putting food on the table are not easy tasks for many Mainers Keep ME Warm and Food for ME are programs aimed at helping Mainers heat their homes and feed their families Keep ME Warm, a state-wide initiative managed by United Way, continued its work for a third year raising funds to provide emergency fuel assistance around the state These funds help thousands of households that do not qualify for LIHEAP (Low Income Home Energy Assistance Program), but still earn less than 80% of the Area Median Income Funds were distributed through Peoples Regional Opportunity Program and other community action programs around the state At the same time, food pantries experienced a 15-35% increase in requests and scores of local all-volunteer food pantries, with limited fundraising capabilities, faced the difficult choice of reducing the amount of food they distributed or turning hungry people away United Way of Greater Portland and Preble Street joined forces to raise money and offset losses that impacted every community in Maine and fill pantry shelves from Kittery to Madawaska with Food for ME DESIGNATIONS Designations are donor directed contributions to Health and Human Service organizations Donors to United Way's campaign may direct all or a portion of their contribution to specific non-profit agencies that provide Health and Human Services Each agency's non-profit 501(c)(3) status and compliance with USA Patriot Act is verified before funds are distributed Community Impact & Agency Services Expenses incurred by the organization to assess community needs, lead and participate in community partnerships and advocacy to advance our Education, Income and Health goals, provide outcome measurement training and assistance to agencies, assist and promote agency collaboration and merger, conduct program reviews and selection of program/agency recipients, administer grants and provide financial and programmatic oversight 2-1-1-MAINE 2-1-1 Maine is a partnership of the United Ways in Maine, Youth Alternatives Ingraham and the State of Maine that connects people to resources such as food pantries and mental health services through a toll free telephone number, 2-1-1 and a robust online directory at 211maine.org Call Specialists access over 9,000 resources in the directory and share critical contact information with callers, 24-hours a day, 365 days a year Last year, calls increased 44% from 50,000 to 72,000 OTHER GRANTS & SCHOLARSHIPS United Way administers various grant programs to promote diversity and inclusion, assist people in need, assess and promote non-profit collaboration and scholarship programs for minority youth and students in the greater Portland area Volunteer Development Volunteers play a vital role in improving people's lives and reaching our goals in Education, Income and Health To this end, United Way works with agencies to secure qualified volunteers and works with volunteers to locate appropriate volunteer opportunities As a founding member of the VolunteerMaine Partnership, United Way offers a statewide, searchable listing of volunteer opportunities at www.volunteermaine.org This valuable tool allows agencies to post volunteer opportunities and individuals to perform a customized search In addition to hosting and administering the site, we offer regular trainings to volunteers and agencies on how to use it Additionally, United Way organizes several volunteer-lead events throughout the year Family Volunteer Day, 9/11 Day of Service and Remembrance, and Community Thanksgiving One of the largest and well attended events is the Day of Caring/Heart of Sharing In 2009, 1,000 dedicated 5,000 hours of service to 87 projects at 56 different agencies to make Day of Caring a huge success LANGUAGE ACCESS FOR NEW AMERICANS People from more than 80 countries live in Greater Portland More than 50 languages are spoken in Portland Public Schools Language Access for New Americans (LANA) is a program that improves services for refugees and immigrants with limited English proficiency by improving the quality and increasing the number of interpreters and translators in Maine Through LANA's interpreter training programs, 87 individuals who speak 32 languages received specialized training that can help new American at some of their most vulnerable times Thirty interpreters became Maine court interpreters, while 24 completed the 100-hour medical training Expenses \$ 4949299 including grants of \$ 3789381 Revenue \$ 45351

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 2		tw o directors are employed by an organization w hich has three board members w ho are also on the united w ay board and one member w ho is a former director of united w ay tw o directors are employed by another organization w hich has tw o board members w ho are also on the united w ay board and one member w ho is a former director of united w ay

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 6		Membership The membership of United Way, Inc consists of contributors to the United Way Campaign, United Way volunteers, and representatives of providers of human services in the community that are supported financially by United Way, as follow s Individual Members All individuals w ho have made a financial contribution to the most recently completed United Way Campaign qualify as contributor members of United Way for the ensuing calendar year Those individuals w ho have volunteered for United Way of Greater Portland qualify as volunteer members of United Way for the ensuing calendar year Organizational Members Those partner agencies w hich receive any funding from the corporation qualify as an agency member of the corporation for the ensuing calendar year, and are entitled to designate a volunteer to represent them as a member of the corporation at any meeting of the members

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7a		Pow ers The membership of the corporation shall have the follow ing pow ers and authority (a) To attend the Annual Meeting and any Special Meeting(s) of the membership (b) To receive reports at meetings of the membership (c) To elect Directors of the corporation at the Annual Meeting (d) To enact and amend the By-Law s of United Way, Inc

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 7b		SEE PRECEEDING EXPLANATION (LINE 7A)

Identifier	Return Reference	Explanation
Form 990, Part VI, Section A, line 10		A COPY OF THE FORM 990 IS PROVIDED TO THE BOARD TO BE REVIEWED BEFORE IT IS FILED

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 12c		United Way, Inc 's Code of Ethics is intended to guide and advance the ethical conduct of both volunteers and staff in carrying out their United Way responsibilities As part of the Code of Ethics, the Board of Directors and staff must avoid a conflict of interest or the appearance of a conflict of interest, w hich could tarnish the reputation of United Way, Inc or undermine the public's trust in United Way, Inc's staff and volunteers To ensure that the best interests of United w ay, Inc are served, the Board of Directors and staff upon first being appointed, elected or hired disclose, in w riting, to the best of his or her know ledge, any potential conflicts of interest that involve the individual, his or her immediate relatives, or any entity w ith w hich he or she is associated in a significant leadership or ow nership capacity Thereafter, these disclosures are updated annually, or sooner if changed circumstances in a particular case may warrant The terms of all potential conflicts of interest are review ed by management and reported to the Executive Committee of United Way, Inc as necessary to ensure compliance w ith the Code of Ethics

Identifier	Return Reference	Explanation
Form 990, Part VI, Section B, line 15		THE PRESIDENT'S AND OTHER KEY EMPLOYEE'S COMPENSATION IS BASED ON A SALARY ADMINISTRATION PLAN DEVELOPED BY AN INDEPENDENT CONSULTANT BASED ON COMPARABLE DATA AND REVIEWED AND APPROVED BY UNITED WAY'S VOLUTEER HR COMMITTEE THE BOARD OF DIRECTORS REVIEWS AND APPROVES THE PRESIDENT'S COMPENSATION AND BENEFITS

Identifier	Return Reference	Explanation
Form 990, Part VI, Section C, line 19		UNITED WAY INC'S CONFLICT OF INTEREST AND MOST RECENT AUDITED FINANCIAL STATEMENTS ARE AVAILABLE ON LINE AT WWW LIVEUNITEDGP ORG AND ITS GOVERNING DOCUMENTS ARE AVAILABLE UPON REQUEST

Identifier	Return Reference	Explanation
FORM 990, PART XI, LINE 2C		The Board of Directors, upon the recommendation of the Finance Committee, selects the independent accountants and the Finance Committee is responsible for the oversight of our annual financial statement audit

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Attach to Form 990. To be completed by organizations that answer "Yes" to Form 990, Part IV, lines 33, 34, 35, 36, or 37.
▶ See separate instructions.

OMB No 1545-0047

2008

Open to Public Inspection

Name of the organization
UNITED WAY INC
dba UNITED WAY OF GREATER PORTLAND

Employer identification number

01-0241767

Part I

Identification of Disregarded Entities

(A) Name, address, and EIN of disregarded entity	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Total income	(E) End-of-year assets	(F) Direct controlling entity

Part II

Identification of Related Tax-Exempt Organizations

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Exempt Code section	(E) Public charity status (if section 501(c)(3))	(F) Direct controlling entity
211 MAINE INC PO BOX 15200 PORTLAND, ME041125200 30-0194364	HEALTH & HUMAN SERVICE INFORMAITON AND REFERRAL SERVICE	ME	501(C)(3)	7	N/A

Part III

Identification of Related Organizations Taxable as a Partnership

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Predominant income(related, investment, unrelated)	(F) Share of total income	(G) Share of end-of- year assets	(H) Disproporionate allocations?		(I) Code V—UBI amount on Box 20 of K-1	(J) General or managing partner?	
							Yes	No		Yes	No

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust

(A) Name, address, and EIN of related organization	(B) Primary activity	(C) Legal domicile (state or foreign country)	(D) Direct controlling entity	(E) Type of entity (C corp, S corp, or trust)	(F) Share of total income	(G) Share of end-of-year assets	(H) Percentage ownership

Part V

Transactions with Related Organizations

Note. Complete line 1 if any entity is listed in Parts II, III or IV

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

a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity

b Gift, grant, or capital contribution to other organization(s)

c Gift, grant, or capital contribution from other organization(s)

d Loans or loan guarantees to or for other organization(s)

e Loans or loan guarantees by other organization(s)

f Sale of assets to other organization(s)

g Purchase of assets from other organization(s)

h Exchange of assets

i Lease of facilities, equipment, or other assets to other organization(s)

j Lease of facilities, equipment, or other assets from other organization(s)

k Performance of services or membership or fundraising solicitations for other organization(s)

l Performance of services or membership or fundraising solicitations by other organization(s)

m Sharing of facilities, equipment, mailing lists, or other assets

n Sharing of paid employees

o Reimbursement paid to other organization for expenses

p Reimbursement paid by other organization for expenses

q Other transfer of cash or property to other organization(s)

r Other transfer of cash or property from other organization(s)

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

No

No

No

No

No

No

No

No

No

No

Yes

No

No

No

No

No

No

No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds		
(A) Name of other organization(s)	(B) Transaction type(a-r)	(C) Amount Involved
(1) 211 MAINE INC	B	255,000
(2)		
(3)		
(4)		
(5)		
(6)		

Schedule R (Form 990) 2008

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

[illegible]