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Return of Organization Exempt From Income Tax

OMB No 1545-0047

2008

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

▶ The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2008 calendar year, or tax year beginning July 1, 2008, and ending June 30, 20 09

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 of Central Massachusetts, Inc.

Doing Business As

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

484 Main Street

Room/suite

300

City or town, state or country, and ZIP + 4

Worcester, MA 01608

D Employer identification number

04 2104017

E Telephone number

(508) 757-5631

G Gross receipts \$ 10,003,104

F Name and address of principal officer Timothy J. Garvin

same as C above

H(a) Is this a group return for affiliates? ☐ Yes ☒ NoH(b) Are all affiliates included? ☐ Yes ☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number ▶

I Tax-exempt status. ☒ 501(c) (3) (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ www.unitedwaycm.org

K Type of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation: 1920 M State of legal domicile: MA

Part I Summary

1 Briefly describe the organization's mission or most significant activities:
United Way of Central Massachusetts connects people and resources to improve the community.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	23
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	20
5	Total number of employees (Part V, line 2a)	5	28
6	Total number of volunteers (estimate if necessary)	6	2235
7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a	0
7b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	6,794,932	6,828,802
9	Program service revenue (Part VIII, line 2g)	0	0
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	125,198	120,610
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	351,024	(685,034)
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	7,271,154	6,264,378
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	4,272,594	4,226,112
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	1,551,474	1,627,121
16a	Professional fundraising fees (Part IX, column (A), line 11e)	52,879	51,741
b	Total fundraising expenses (Part IX, column (D), line 25) ▶ 866,041		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	925,291	769,288
18	Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	6,802,238	6,674,262
19	Revenue less expenses. Subtract line 18 from line 12	468,916	(409,884)
		Beginning of Year	End of Year
20	Total assets (Part X, line 16)	10,225,582	8,207,104
21	Total liabilities (Part X, line 26)	4,810,704	4,483,427
22	Net assets or fund balances. Subtract line 21 from line 20	5,414,878	3,723,677

Part II Signature Block

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

Sign Here

Signature of officer

Date

Michael J. Mulrain, Treasurer

Print name and title

RECEIVED FEB 18 2010 PAID PREPARED USE ONLY	Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (see instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	EIN ▶	Phone no ▶ ()	

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

For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990 (2008)

SCANNED MAR 11 2010

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Part III Statement of Program Service Accomplishments (see instructions)

- 1** Briefly describe the organization's mission:
United Way of Central Massachusetts is working to advance the common good by focusing on education, income, and health. These are the building blocks for a good life-a quality education that leads to a stable job, enough income to support a family through retirement, and good health. Our goal is to create long-lasting changes that prevent problems from happening in the first place by inspiring our community to give, advocate, and volunteer.
- 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 501(c)(4) organizations and section 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 \$ 3,488,193 including grants of \$ 3,144,430) (Revenue \$ 0)
Community Impact Program - The Community Impact Program plays a critical role in the local community by helping those in need. As community leaders, we convene local resources - donors, volunteers, partners and agencies to address the most critical needs in three focus areas: ensuring children's readiness for school, supporting positive youth development, and helping people most in need. United Way of Central Massachusetts staff and volunteers, through a competitive process, evaluate funding proposals, select the highest quality agency programs to fund, and monitor program results to ensure maximum community impact. During FY 2009, 61 funded programs provide services in the one or more of the three basic components for a good life: education, health, and income.

4b (Code:) (Expenses \$ 293,332 including grants of \$ 188,556) (Revenue \$ 0)
Women's Initiative Community Impact Program - The Women's Initiative focuses on building, strengthening, and supporting the development of confident and safe adolescent girls, and has successfully brought about lasting change. Through educational events, grants for area programs, financial literacy education, and sponsorship of a comprehensive local needs assessment, the Women's Initiative of the United Way is a thriving vehicle of change for girls in central Massachusetts. The Women's Initiative is engaging local women in providing financial literacy education to adolescent girls. In 2008, Women's Initiative delivered four, full-day conferences for almost 400 middle-school girls, utilizing the time and talent of more than 100 professional women.

4c (Code:) (Expenses \$ 227,880 including grants of \$ 100,000) (Revenue \$ 0)
Worcester Youth Capacity Project - The Worcester Youth Capacity Project is a collaborative effort to strengthen the organizational capacity and sustainability of five faith-based and community-based organizations that are actively engaged in ending youth violence in Worcester. The project engages a community network of youth service providers in collaborative capacity building; builds the skills and leadership of youth work professionals, volunteers, and boards of directors; and develops organizational capacity of the five organizations in the areas of planning, evaluation, volunteer programming, and fiscal and management structures. In addition, the project helps develop effective programs, with a focus on positive youth development, outcome measurement, and promising practices in addressing youth violence. The project also advances organizational knowledge related to fund development planning and fundraising strategies. The funding for this project is provided by a federal grant from the Department of Health and Human Services.

4d Other program services. (Describe in Schedule O)
 (Expenses \$ 1,136,293 including grants of \$ 793,126) (Revenue \$)

4e Total program service expenses ► \$ 5,145,698 (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)? If "Yes," complete Schedule A	☒	☐
2 Is the organization required to complete Schedule B, Schedule of Contributors?	☒	☐
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	☐	☒
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	☐	☒
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? If "Yes," complete Schedule C, Part III	☐	☐
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? If "Yes," complete Schedule D, Part I	☐	☒
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II	☐	☒
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	☐	☒
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? If "Yes," complete Schedule D, Part IV	☒	☐
10 Did the organization hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V	☒	☐
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	☒	☐
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? If "Yes," complete Schedule D, Parts XI, XII, and XIII	☒	☐
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	☐	☒
14a Did the organization maintain an office, employees, or agents outside of the U.S.?	☐	☒
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.? If "Yes," complete Schedule F, Part I	☐	☒
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? If "Yes," complete Schedule F, Part II	☐	☒
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? If "Yes," complete Schedule F, Part III	☐	☒
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? If "Yes," complete Schedule G, Part I	☒	☐
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	☒	☐
19 Did the organization report more than \$15,000 on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	☐	☒
20 Did the organization operate one or more hospitals? If "Yes," complete Schedule H	☐	☒
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	☒	☐
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	☐	☒
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J	☐	☒
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25.	☐	☒
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	☐	☐
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	☐	☐
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	☐	☐
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	☐	☒
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If "Yes," complete Schedule L, Part I	☐	☒
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? If "Yes," complete Schedule L, Part II	☐	☒
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? If "Yes," complete Schedule L, Part III	☐	☒

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	28a ✓	
b Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV	28b	✓
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	28c ✓	
29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M	29	✓
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	30	✓
31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31	✓
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II	32	✓
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I	33	✓
34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1	34	✓
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	35	✓
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36	✓
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37	✓

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable	1a 83,439	
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable	1b 0	
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c ✓	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a 28	
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	2b ✓	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	3a	✓
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	✓
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	✓
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	✓
c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?	5c	
6a	Did the organization solicit any contributions that were not tax deductible?	6a	✓
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?	7a	✓
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	✓
d	If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	✓
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	✓
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?	7h	
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**

	Yes	No
For each "Yes" response to lines 2–7b 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 23	
b Enter the number of voting members that are independent	1b 20	
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	✓
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	✓
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?	4	✓
5 Did the organization become aware during the year of a material diversion of the organization's assets?	5	✓
6 Does the organization have members or stockholders?	6	✓
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	✓
b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b	✓
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
a The governing body?	8a ✓	
b Each committee with authority to act on behalf of the governing body?	8b ✓	
9a Does the organization have local chapters, branches, or affiliates?	9a	✓
b 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 ✓	
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 ✓	

Section B. Policies

	Yes	No
12a Does the organization have a written conflict of interest policy? If "No," go to line 13	12a ✓	
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b ✓	
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c ✓	
13 Does the organization have a written whistleblower policy?	13 ✓	
14 Does the organization have a written document retention and destruction policy?	14 ✓	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
a The organization's CEO, Executive Director, or top management official?	15a ✓	
b Other officers or key employees of the organization?	15b	✓
Describe the process in Schedule O. (see instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a	✓
b 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 ► **Massachusetts**

18 Section 6104 requires an organization to make its Forms 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.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► **James Hayes, 484 Main Street, Suite 300 Worcester, MA 01608 508.757.5631**

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

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

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

• List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.

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

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

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

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

(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			
Mark P. Bilotta Chair of the Board of Directors	1	✓		✓				0	0	0
Brian M. Chandley Clerk of the Board of Directors	1	✓		✓				0	0	0
Michael J. Mulrain Treasurer of the Board of Directors	1	✓		✓				0	0	0
Maria Addison At-large Board Member	1	✓						0	0	0
Todd Bailey At-large Board Member	1	✓						0	0	0
Maurice Boisvert At-large Board Member	1	✓						0	0	0
Michael F. Buckley At-large Board Member	1	✓						0	0	0
Brian Bullock At-large Board Member	1	✓						0	0	0
Jack Calareso, Ph.D. At-large Board Member	1	✓						0	0	0
Joseph P. Carlson At-large Board Member	1	✓						0	0	0
Linda A. Cavaoli At-large Board Member	1	✓						0	0	0
Mark Crandall At-large Board Member	1	✓						0	0	0
Sandra Ellis At-large Board Member	1	✓						0	0	0
Joseph Freitas At-large Board Member	1	✓						0	0	0
Bruce Gaultney At-large Board Member	1	✓						0	0	0
Dennis L. Irish At-large Board Member	1	✓						0	0	0
Nancy Kidd Brown At-large Board Member	1	✓						0	0	0

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

(A) Name and title	(B) Average hours per week	(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			
Glenn Knowlton At-large Board Member	1	☒						0	0	0
Susan M. Mailman At-large Board Member	1	☒						0	0	0
Wendy O'Leary At-large Board Member	1	☒						0	0	0
Marcy Reed At-large Board Member	1	☒						0	0	0
Laurie B. Ross, Ph.D. At-large Board Member	1	☒						0	0	0
Elizabeth V. Young At-large Board Member	1	☒						0	0	0
Timothy J. Garvin President and CEO	35			☒				116,903	0	0
James L. Hayes Vice President, Finance and Operations	35			☒				78,328	0	0
1b Total								195,231	0	0

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization **▶ 1**

3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual

	Yes	No
3		☒
4		☒
5		☒

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual.

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization ▶ 0		

Part VIII Statement of Revenue				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants and other similar amounts	1a Federated campaigns	1a	72,358				
	b Membership dues	1b					
	c Fundraising events	1c	33,500				
	d Related organizations	1d					
	e Government grants (contributions)	1e	250,686				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	6,472,258				
	g Noncash contributions included in lines 1a-1f: \$		23,170				
	h Total. Add lines 1a-1f			6,828,802			
Program Service Revenue			Business Code				
	2a						
	b						
	c						
	d						
	e						
	f All other program service revenue						
	g Total. Add lines 2a-2f			0			
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			120,610			120,610
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
		(i) Real	(ii) Personal				
	6a Gross Rents	53,487					
	b Less: rental expenses	56,862					
	c Rental income or (loss)	(3,375)					
	d Net rental income or (loss)			(3,375)			(3,375)
	7a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		3,685,239					
	b Less: cost or other basis and sales expenses	4,440,756					
	c Gain or (loss)	(755,517)					
	d Net gain or (loss)			(755,517)			(755,517)
	8a Gross income from fundraising events (not including \$ 33,500 of contributions reported on line 1c). See Part IV, line 18	a	0				
	b Less: direct expenses	b	0				
	c Net income or (loss) from fundraising events			0			
	9a Gross income from gaming activities. See Part IV, line 19	a	0				
	b Less: direct expenses	b	0				
c Net income or (loss) from gaming activities			0				
10a Gross sales of inventory, less returns and allowances	a	0					
b Less: cost of goods sold	b	0					
c Net income or (loss) from sales of inventory			0				
Miscellaneous Revenue			Business Code				
11a Cost Recovery fees		900099	73,858	73,858			
b							
c							
d All other revenue							
e Total. Add lines 11a-11d			73,858				
12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e			6,264,378	73,858		(638,282)	

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	4,226,112	4,226,112		
2	Grants and other assistance to individuals in the U.S. See Part IV, line 22	0	0		
3	Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16	0	0		
4	Benefits paid to or for members	0	0		
5	Compensation of current officers, directors, trustees, and key employees	245,996	25,172	200,623	20,201
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0	0	0	0
7	Other salaries and wages	1,032,142	390,332	199,804	442,006
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	35,049	13,474	6,035	15,540
9	Other employee benefits	225,565	92,510	48,240	84,815
10	Payroll taxes	88,369	29,614	25,923	32,832
11	Fees for services (non-employees):				
a	Management	0	0	0	0
b	Legal	3,575	0	3,575	0
c	Accounting	18,450	0	18,450	0
d	Lobbying	0	0	0	0
e	Professional fundraising services. See Part IV, line 17	51,741			51,741
f	Investment management fees	22,352	0	22,352	0
g	Other	217,257	175,251	28,758	13,348
12	Advertising and promotion	56,678	4,575	1,344	50,759
13	Office expenses	99,590	40,809	34,809	23,972
14	Information technology	17,363	14,543	1,032	1,788
15	Royalties	0	0	0	0
16	Occupancy	109,367	38,464	31,330	39,573
17	Travel	18,431	11,474	3,064	3,893
18	Payments of travel or entertainment expenses for any federal, state, or local public officials	0	0	0	0
19	Conferences, conventions, and meetings	99,649	48,202	2,809	48,638
20	Interest	0	0	0	0
21	Payments to affiliates	62,921	22,274	17,725	22,922
22	Depreciation, depletion, and amortization	35,658	12,623	10,045	12,990
23	Insurance	3,103	0	3,103	0
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	Organization dues	2,918	269	1,776	873
b	Miscellaneous	1,976	0	1,726	250
c					
d					
e					
f	All other expenses				
25	Total functional expenses. Add lines 1 through 24f	6,674,262	5,145,698	662,523	866,041
26	Joint Costs. Check here ☐ 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	0	0	0	0

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
Assets	1 Cash—non-interest-bearing	946,157	1	506,921
	2 Savings and temporary cash investments	135,333	2	22,678
	3 Pledges and grants receivable, net	2,392,317	3	2,136,426
	4 Accounts receivable, net	50,888	4	123,861
	5 Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L	0	5	0
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L	0	6	0
	7 Notes and loans receivable, net	0	7	0
	8 Inventories for sale or use	0	8	0
	9 Prepaid expenses and deferred charges	0	9	0
	10a Land, buildings, and equipment: cost basis	1,767,641		
	b Less: accumulated depreciation. Complete Part VI of Schedule D	1,638,449		
		152,587	10c	129,192
	11 Investments—publicly traded securities	5,947,148	11	4,838,170
	12 Investments—other securities. See Part IV, line 11	0	12	0
	13 Investments—program-related. See Part IV, line 11	0	13	0
	14 Intangible assets	0	14	0
15 Other assets. See Part IV, line 11	601,152	15	449,856	
16 Total assets. Add lines 1 through 15 (must equal line 34)	10,225,582	16	8,207,104	
Liabilities	17 Accounts payable and accrued expenses	147,080	17	207,545
	18 Grants payable	4,663,624	18	4,268,374
	19 Deferred revenue	0	19	0
	20 Tax-exempt bond liabilities	0	20	0
	21 Escrow account liability. Complete Part IV of Schedule D	0	21	7,508
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L	0	22	0
	23 Secured mortgages and notes payable to unrelated third parties	0	23	0
	24 Unsecured notes and loans payable	0	24	0
	25 Other liabilities. Complete Part X of Schedule D	0	25	0
	26 Total liabilities. Add lines 17 through 25	4,810,704	26	4,483,427
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	5,220,646	27	3,462,357
	28 Temporarily restricted net assets	134,232	28	201,320
	29 Permanently restricted net assets	60,000	29	60,000
	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	5,414,878	33	3,723,677
	34 Total liabilities and net assets/fund balances	10,225,582	34	8,207,104

Part XI Financial Statements and Reporting

- 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?
- b** Were the organization's financial statements audited by an independent accountant?
- 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?
- 3a** As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?
- b** If "Yes," did the organization undergo the required audit or audits?

	Yes	No
2a	☒	☐
2b	☒	☐
2c	☒	☐
3a	☐	☒
3b	☐	☐

Department of the Treasury
Internal Revenue Service

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 of Central Massachusetts, Inc.

Employer identification number

04

2104017

Part I	Reason for Public Charity Status (All organizations must complete this part.) (see instructions)
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The organization is not a private foundation because it is: (Please check only **one** organization)

- 1 ☐ A church, convention, or association 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 33⅓ % 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 33⅓ % 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?

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

h Provide the following information about the organizations the organization supports

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 Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)
Section A. 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.")	6,522,822	6,549,218	6,672,750	6,784,490	6,828,802	33,358,082
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
3 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
4 Total. Add lines 1-3	6,522,822	6,549,218	6,672,750	6,784,490	6,828,802	33,358,082
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						3,795,961
6 Public support. Subtract line 5 from line 4.						29,562,121

Section B. 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	6,522,822	6,549,218	6,672,750	6,784,490	6,828,802	33,358,082
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	80,457	110,578	124,056	125,198	120,610	565,487
9 Net income from unrelated business activities, whether or not the business is regularly carried on	0	0	0	0	0	0
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	47,124	47,718	28,220	51,103	53,487	227,652
11 Total support. Add lines 7 through 10						34,151,221
12 Gross receipts from related activities, etc. (see instructions)					12	0
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2008 (line 6, column (f) divided by line 11, column (f))	14	86.56 %
15 Public support percentage from 2007 Schedule A, Part IV-A, line 26f	15	92.41 %
16a 33⅓% support test—2008. If the organization did not check the box on line 13, and line 14 is 33⅓% or more, check this box and stop here. The organization qualifies as a publicly supported organization ☒		
b 33⅓% support test—2007. If the organization did not check a box on line 13 or 16a, and line 15 is 33⅓% 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 a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ► ☐		

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

Section B. Total Support

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

Section C. Computation of Public Support Percentage

15 Public support percentage for 2008 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2007 Schedule A, Part IV-A, line 27g	16	%

Section D. 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 33⅓% support tests—2008.** If the organization did not check the box on line 14, and line 15 is more than 33⅓%, and line 17 is not more than 33⅓%, check this box and **stop here**. The organization qualifies as a publicly supported organization ► ☐
- b 33⅓% support tests—2007.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33⅓%, and line 18 is not more than 33⅓%, 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 explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Provide any other additional information. (see instructions)

Part II - Section B - Line 11 - United Way of Central Massachusetts, Inc. leases an office condominium it owns outright to other local non-profit agencies.

**SCHEDULE D
(Form 990)**

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

► 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.

OMB No 1545-0047

2008

**Open to Public
Inspection**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number

04 : 2104017

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 important 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	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

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 section 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)	
1	2
3	4
5	6
7	8
9	10
11	12
13	14
15	16
17	18
19	20
21	22
23	24
25	26
27	28
29	30
31	32
33	34
35	36
37	38
39	40
41	42
43	44
45	46
47	48
49	50
51	52
53	54
55	56
57	58
59	60
61	62
63	64
65	66
67	68
69	70
71	72
73	74
75	76
77	78
79	80
81	82
83	84
85	86
87	88
89	90
91	92
93	94
95	96
97	98
99	100

- 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 | d ☐ Loan or exchange programs |
| b ☐ Scholarly research | e ☐ Other _____ |
| c ☐ Preservation for future generations | |
- 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 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 the arrangement in Part XIV and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21? ☒ Yes ☐ No

b If "Yes," explain the arrangement in Part XIV.

	Amount
1c	
1d	
1e	
1f	

Part V	Endowment Funds. Complete if 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 . . .	60,000				
b Contributions	0				
c Investment earnings or losses . .	1,217				
d Grants or scholarships	0				
e Other expenditures for facilities and programs					
f Administrative expenses	1,217				
g End of year balance	60,000				

- 2** Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment ► _____%
- b Permanent endowment ► **100** %
- c Term endowment ► _____%

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

	Yes	No
3a(i)	✓	
3a(ii)		
3b		

- (i) unrelated organizations
- (ii) related organizations
- b** If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?
- 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.

INVESTMENTS IN LAND, BUILDINGS, AND EQUIPMENT (SEE FORM 990, PART VII, AND 90)				
Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land	0	0		0
b Buildings	0	367,137	350,637	16,500
c Leasehold improvements	0	774,289	686,444	87,845
d Equipment	0	421,300	404,636	16,664
e Other	0	204,915	196,732	8,183
Total. Add lines 1a–1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				129,192

Total. Add lines 1a–1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)	129,192
--	----------------

Part VII Investments—Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other		
.....		
.....		
.....		
.....		
.....		
.....		
.....		
.....		
Total. (Column (b) should equal Form 990, Part X, col. (B) line 12.) ▶		

Part VIII Investments—Program Related. See Form 990, Part X, line 13.

(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.) ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
Beneficial in trust - United Way of Central Massachusetts Fund held at the Greater Worcester Community Foundation.	449,856
.....	
.....	
.....	
.....	
.....	
.....	
.....	
Total. (Column (b) should equal Form 990, Part X, col. (B) line 15.) ▶	449,856

Part X Other Liabilities. See Form 990, Part X, line 25.

(a) Description of liability	(b) Amount
Federal income taxes	
.....	
.....	
.....	
.....	
.....	
.....	
.....	
.....	
Total. (Column (b) should equal Form 990, Part X, col. (B) line 25.) ▶	

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

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)	1	6,264,378
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	6,674,262
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3	(409,884)
4	Net unrealized gains (losses) on investments	4	(1,130,279)
5	Donated services and use of facilities	5	(23,170)
6	Investment expenses	6	0
7	Prior period adjustments	7	0
8	Other (Describe in Part XIV)	8	(127,866)
9	Total adjustments (net). Add lines 4-8	9	(1,281,315)
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	(1,691,199)

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	4,124,728
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	(1,130,279)
b	Donated services and use of facilities	2b	0
c	Recoveries of prior year grants	2c	0
d	Other (Describe in Part XIV)	2d	(947,733)
e	Add lines 2a through 2d	2e	(2,078,012)
3	Subtract line 2e from line 1	3	6,202,740
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	38,468
b	Other (Describe in Part XIV)	4b	23,170
c	Add lines 4a and 4b	4c	61,638
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5	6,264,378

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	5,815,929
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	0
b	Prior year adjustments	2b	0
c	Losses reported on Form 990, Part IX, line 25	2c	0
d	Other (Describe in Part XIV)	2d	0
e	Add lines 2a through 2d	2e	0
3	Subtract line 2e from line 1	3	5,815,929
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	38,468
b	Other (Describe in Part XIV)	4b	819,867
c	Add lines 4a and 4b	4c	858,335
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5	6,674,264

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 IV, 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.

1. Part V - Endowment Funds - Line 4:

Earnings from endowments are used by the organization to subsidize its administrative expenses.

2. Part XII line 2d Other - Amounts included on line 1 but not on Form 990, Part VIII, line 12:

Designated donations - (\$768,126)

Professional fundraising fees charged by other organizations - (\$51,741)

Change in value of a beneficial interest in trust - (\$127,866)

Part XIV Supplemental Information *(continued)*

Total = (\$947,733)

Part XII line 4d Other - Amounts included on Form 990, Part VIII, line 12, but not on line 1:

Donated newspaper advertising - \$21,528

Donated web site hosting services - \$1,642

Total = \$23,170

3. Part XIII - line 4b Other - Amounts included on Form 990, Part IX, line 25, but not on line 1:

Designated donations - \$768,126

Professional fundraising fees charged by other organizations - \$51,741

Total = \$819,867

4. United Way of Central Massachusetts served as a fiscal agent for the Diabetes Coalition of Massachusetts. The total liability as of June 30, 2009 was \$7,508.

Department of the Treasury
Internal Revenue Service

► **Attach to Form 990 or Form 990-EZ.** Must be completed by organizations that answer "Yes" to Form 990, Part IV, lines 17, 18, or 19, and by organizations that enter more than \$15,000 on Form 990-EZ, line 6a.

2008

Open To Public Inspection

United Way of Central Massachusetts, Inc.

04 : 2104017

1 Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a ☒ Mail solicitations
- b ☒ Email solicitations
- c ☒ Phone solicitations
- d ☒ In-person solicitations

- e** ☒ Solicitation of non-government grants
- f** ☒ Solicitation of government grants
- g** ☒ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☒ Yes ☐ No

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

(i) Name of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
United Ways of New England	Wrkplc Cmpns	✓		409,907	30,743	379,164
ABCD, Inc.	COMECC adm	✓		136,154	11,614	124,540
Total				546,061	42,357	503,704

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing.

Massachusetts

Part II Fundraising Events. Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

		(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events
		Solicitation (event type)	Solicitation (event type)	(total number)	(Add col (a) through col (c))
Revenue	1 Gross receipts	18,500	15,000		33,500
	2 Less: Charitable contributions	18,500	15,000		33,500
	3 Gross revenue (line 1 minus line 2)	0	0		0
Direct Expenses	4 Cash prizes	0	0		0
	5 Non-cash prizes	0	0		0
	6 Rent/facility costs	4,749	5,700		10,459
	7 Other direct expenses	16,574	7,021		23,595
	8 Direct expense summary. Add lines 4 through 7 in column (d)				(34,054)
	9 Net income summary. Combine lines 3 and 8 in column (d)				(34,054)

Part III Gaming. Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (Add col (a) through col (c))
Revenue	1 Gross revenue				
	2 Cash prizes				
Direct Expenses	3 Non-cash prizes				
	4 Rent/facility costs				
	5 Other direct expenses				
	6 Volunteer labor	☐ Yes _____% ☐ No	☐ Yes _____% ☐ No	☐ Yes _____% ☐ No	
	7 Direct expense summary. Add lines 2 through 5 in column (d)				()
	8 Net gaming income summary. Combine lines 1 and 7 in column (d)				

	Yes	No
9 Enter the state(s) in which the organization operates gaming activities: _____		
a Is the organization licensed to operate gaming activities in each of these states?	9a	
b If "No," Explain: _____		
10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year?	10a	
b If "Yes," Explain: _____		
11 Does the organization operate gaming activities with nonmembers?	11	
12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?	12	

		Yes	No
13	Indicate the percentage of gaming activity operated in:		
a	The organization's facility 13a %		
b	An outside facility 13b %		
14	Provide the name and address of the person who prepares the organization's gaming/special events books and records:		
	Name ►		
	Address ►		
15a	Does the organization have a contract with a third party from whom the organization receives gaming revenue? 15a		
b	If "Yes," enter the amount of gaming revenue received by the organization ► \$ and the amount of gaming revenue retained by the third party ► \$		
c	If "Yes," enter name and address:		
	Name ►		
	Address ►		
16	Gaming manager information:		
	Name ►		
	Gaming manager compensation ► \$		
	Description of services provided ►		
	☐ Director/officer ☐ Employee ☐ Independent contractor		
17	Mandatory distributions:		
a	Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? 17a		
b	Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year ► \$		

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

**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**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number

04 : 2104017

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 (Form 990) 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
Big Brothers Big Sisters Cntrl. MA/Metro West Worcester MA	04-2317926	501(c)(3)	99,857				Program Operating
Boys & Girls Club of Worcester, Inc. 65 Tainter Street Worc... MA	04-2105851	501(c)(3)	49,928				Program Operating
Boys & Girls Club of Worcester, Inc. 65 Tainter Street Worc... MA	04-2105851	501(c)(3)	84,878				Program Operating
Boys & Girls Club of Worcester, Inc. 65 Tainter Street Worc... MA	04-2105851	501(c)(3)	29,957				Program Operating
Boys & Girls Club of Worcester, Inc. 65 Tainter Street Worc... MA	04-2105851	501(c)(3)	44,448				Program Operating
The Bridge of Central MA, Inc. 4 Mann Street Worcester MA	04-2701581	501(c)(3)	44,936				Program Operating
The CASA Project 100 Grove Street Worcester MA 01605	04-2711865	501(c)(3)	59,914				Program Operating
Children's Friend, Inc. 21 Cedar Street Worcester MA 01609	04-2105856	501(c)(3)	29,957				Program Operating
Children's Friend, Inc. 21 Cedar Street Worcester MA 01609	04-2105856	501(c)(3)	24,964				Program Operating
Community Healthlink, Inc. 72 Janies Avenue Worcester MA	04-2626179	501(c)(3)	79,885				Program Operating
Dynami, Inc. 27 Sever Street Worcester MA 01609	04-2621500	501(c)(3)	34,949				Program Operating
Family Health Center of Worc... Inc. 26 Queen Street Worc... MA	04-2485308	501(c)(3)	86,875				Program Operating
2 Enter total number of section 501(c)(3) and government organizations			12				
3 Enter total number of other organizations			0				

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

Cat No 50055P

Schedule I (Form 990) 2008

SCHEDULE I-1
(Form 990)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

OMB No 1545-0047

2008

**Open to Public
Inspection**

Name of the organization United Way of Central Massachusetts, Inc.	Employer identification number 04-1111111	2104017
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Part I Continuation of Grants and Other Assistance to Governments and Organizations in the U.S. (Schedule I (Form 990), Part II.)								
(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	
Family Services of Central MA, 31 Harvard Street Worcester, MA 01609	04-2103767	501(c)(3)	55,919				Program Operating	
Friendly House, Inc., 36 Wall Street Worcester, MA 01604	04-2104239	501(c)(3)	74,893				Program Operating	
Girls Incorporated of Worcester, 125 Providence Street Worcester, MA	04-2123666	501(c)(3)	49,928				Program Operating	
Girls Incorporated of Worcester, 125 Providence Street Worcester, MA	04-2123666	501(c)(3)	73,154				Program Operating	
UMass Mem. Hlthcare/HOPE Coalition 26 Queen Street Worc, MA	04-2626179	501(c)(3)	73,894				Program Operating	
Oak Hill CDC 74 Providence Street Worcester, MA 01604	22-2599363	501(c)(3)	24,964				Program Operating	
Rainbow Child Development Center 10 Edward Street Worcester, MA	04-2507815	501(c)(3)	14,979				Program Operating	
Southeast Asian Coalition of Cntrl MA, 120 Chandler Street Worc, MA	04-3393955	501(c)(3)	44,939				Program Operating	
YMCA of Central Massachusetts 766 Main Street Worcester, MA	04-2105885	501(c)(3)	29,957				Program Operating	
YMCA of Central Massachusetts 766 Main Street Worcester, MA	04-2105885	501(c)(3)	9,985				Program Operating	
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	24,964				Program Operating	
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	33,951				Program Operating	
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	31,638				Program Operating	
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	69,900				Program Operating	
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	30,482				Program Operating	
2 Enter total number of Section 501(c)(3) and government organizations							15	
3 Enter total number of other organizations							0	

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

Cat. No 51026W

Schedule I-1 (Form 990) 2008

SCHEDULE I-1
(Form 990)

Department of the Treasury
Internal Revenue Service

OMB No 1545-0047

2008

**Open to Public
Inspection**

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

Name of the organization United Way of Central Massachusetts, Inc.	Employer identification number 04-12104017
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Part I Continuation of Grants and Other Assistance to Governments and Organizations in the U.S. (Schedule I (Form 990), Part II).

(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
Centro Las Americas 11 Sycamore Street Worcester, MA 01608	04-2714991	501(c)(3)	43,000				Program Operating
Community Healthlink, Inc. 72 Jaques Avenue Worcester, MA	04-2626179	501(c)(3)	71,086				Program Operating
Community Healthlink, Inc. 72 Jaques Avenue Worcester, MA	04-2626179	501(c)(3)	20,857				Program Operating
Elm Park Ctr. - Early Childhood Edu. 284 Highland Street Worcester, MA	04-2500932	501(c)(3)	18,200				Program Operating
Guild Of St. Agnes 133 Granite Street Worcester, MA 01604	04-2104267	501(c)(3)	15,400				Program Operating
Guild Of St. Agnes 133 Granite Street Worcester, MA 01604	04-2104267	501(c)(3)	22,000				Program Operating
M.S.P.C.C. 335 Chandler Street Worcester, MA 01602	04-2103596	501(c)(3)	25,000				Program Operating
Rainbow Child Development Center 10 Edward Street Worcester, MA	04-2507815	501(c)(3)	43,885				Program Operating
Webster Square Day Care Center Inc. 1048 Main Street Worcester, MA	04-2449880	501(c)(3)	26,250				Program Operating
Worcester Comprehensive Child Care Srv 160 Tacoma St. Worc., MA	04-2484586	501(c)(3)	24,750				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	22,500				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	22,500				Program Operating
American Red Cross 2000 Century Drive Worcester, MA 01606	53-0196605	501(c)(3)	189,717				Program Operating
American Red Cross 2000 Century Drive Worcester, MA 01606	53-0196605	501(c)(3)	45,171				Program Operating
Catholic Charities Worcester County 10 Hammond Street Worcester, MA	04-2103979	501(c)(3)	64,142				Program Operating

2	Enter total number of Section 501(c)(3) and government organizations	15
3	Enter total number of other organizations	0

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

Cat No 51026W

Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

OMB No. 1545-0047

Continuation Sheet for Schedule I (Form 990)

2008

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

**Open to Public
Inspection**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number
04-2104017

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

(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
Central MA Housing Alliance, Inc., Bellevue Street Worcester, MA	04-2791448	501(c)(3)	52,127				Program Operating
Community Healthlink, Inc., 72 Jaques Avenue Worcester, MA	04-2626179	501(c)(3)	76,791				Program Operating
Elder Services of Worcester Area, Inc. 411 Chandler St. Worcester, MA	04-2545221	501(c)(3)	74,711				Program Operating
Elder Services of Worcester Area, Inc. 411 Chandler St. Worcester, MA	04-2545221	501(c)(3)	14,906				Program Operating
Family Health Center of Worc., Inc., 26 Queen Street Worc., MA 01610	04-2485308	501(c)(3)	62,421				Program Operating
Family Services of Central MA, 31 Harvard Street Worcester, MA 01609	04-2103767	501(c)(3)	3,343				Program Operating
Great Brook Valley Health Center, Inc. 19 Tacoma Street Worc., MA	04-2513817	501(c)(3)	113,830				Program Operating
Jewish Family Service of Worcester, Inc. 646 Salisbury Street Worc., MA	04-2104350	501(c)(3)	49,688				Program Operating
Legal Assistance Corporation of Cntrl MA 405 Main Street Worc., MA	04-2446242	501(c)(3)	99,736				Program Operating
Massachusetts Veterans, Inc. 69 Grove Street Worcester, MA 01605	04-3098024	501(c)(3)	22,585				Program Operating
Parnet Family Health Service, Inc., 237 Millbury Street Worcester, MA	04-2453851	501(c)(3)	43,364				Program Operating
So. Middlesex Opportunity Council, 300 Howard St. Framingham, MA	04-2661664	501(c)(3)	63,239				Program Operating
Southeast Asian Coalition of Cntrl MA, 120 Chandler Street Worc., MA	04-3393955	501(c)(3)	36,588				Program Operating
The Community Builders, Inc., 95 Berkley Street, Suite 500 Boston, MA	04-2324773	501(c)(3)	20,959				Program Operating
VNA Care Network, Inc., 120 Thomas Street Worcester, MA 01608	04-2947495	501(c)(3)	20,779				Program Operating

2	Enter total number of Section 501(c)(3) and government organizations	15
3	Enter total number of other organizations	0

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

Cat No 51028W

Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

OMB No 1545-0047

2008

**Open to Public
Inspection**

Name of the organization United Way of Central Massachusetts, Inc.	Employer identification number 04-11203	2104017
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Part I Continuation of Grants and Other Assistance to Governments and Organizations in the U.S. (Schedule I (Form 990), Part II).							
(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
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	49,688				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	40,909				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	36,137				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	75,764				Program Operating
Boys & Girls Club of Worcester, Inc., 65 Tainter Street Worc., MA 01610	04-2105851	501(c)(3)	35,500				Program Operating
Clark University 950 Main Street Worcester, MA 01610	04-2111203	501(c)(3)	15,000				Program Operating
WSC End - Latino Education Institute 486 Chandler St. Worc., MA	04-6002284	501(c)(3)	27,374				Program Operating
The Community Builders, Inc. 95 Berkley Street, Suite 500 Boston, MA	04-2324773	501(c)(3)	13,000				Program Operating
Worcester Polytechnic Institute 100 Institute Road Worcester, MA 01609	04-2121659	501(c)(3)	24,482				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	20,000				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	45,000				Program Operating
Children's Friend, Inc., 21 Cedar Street Worcester, MA 01609	04-2105856	501(c)(3)	5,000				Minor Capital Grant
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	5,000				Minor Capital Grant
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	5,000				Minor Capital Grant
Worcester Comprehensive Child Care Serv 160 Tacoma St. Worc., MA	04-2484586	501(c)(3)	5,000				Minor Capital Grant

2 Enter total number of Section 501(c)(3) and government organizations	15
3 Enter total number of other organizations	0

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

United Way of Central Massachusetts, Inc.

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

OMB No. 1545-0047

2008

**Open to Public
Inspection**

Employer identification number

04 - 2104017

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

(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
Rainbow Child Development Center 10 Edward Street Worcester, MA	04-2507815	501(c)(3)	5,000				Minor Capital Grant
Central MA Housing Alliance, Inc. Bellevue Street Worcester, MA	04-2791448	501(c)(3)	40,000				General Operating
Worcester County Food Bank 474 Boston Turnpike Shrewsbury MA	04-3071457	501(c)(3)	20,000				General Operating
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	40,000				General Operating
Central MA Housing Alliance, Inc. Bellevue Street Worcester, MA	04-2791448	501(c)(3)	8,000				General Operating
Worcester County Food Bank 474 Boston Turnpike Shrewsbury MA	04-3071457	501(c)(3)	8,000				General Operating
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	8,000				General Operating
Worcester Polytechnic Institute 100 Institute Road Worcester, MA 01609	04-2121659	501(c)(3)	5,000				Program Operating
American Red Cross 2000 Century Drive Worcester, MA 01606	53-0196605	501(c)(3)	5,000				Program Operating
Girls Incorporated of Worcester 125 Providence Street Worcester, MA	04-2123666	501(c)(3)	5,000				Program Operating
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	5,000				Program Operating
WSC End Latino Education Institute 486 Chandler St. Worc., MA	04-6002284	501(c)(3)	5,000				Program Operating
Tenacity, Inc. 367 Western Ave. 2nd Floor Brighton, MA 02135	04-3452763	501(c)(3)	5,000				Program Operating
Worcester Youth Center, Inc. 27 Chandler St. Worcester, MA 01609	04-3245867	501(c)(3)	20,000				Capacity Building
Nativity School of Worcester 10 Irving St. Worcester, MA 01609	03-0385377	501(c)(3)	20,000				Capacity Building
2 Enter total number of Section 501(c)(3) and government organizations			15				
3 Enter total number of other organizations			0				

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

Cat. No 51026W

Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

OMB No 1545-0047

2008

**Open to Public
Inspection**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number

04 : 2104017

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

(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
Southeast Asian Coalition of Cntrl... MA, 120 Chandler Street Worc., MA	04-3393955	501(c)(3)	20,000				Capacity Building
Christ Apostolic Church - Higber Ed... Resce Ctr 1189 Main St. Worc. MA	04-3460213	501(c)(3)	20,000				Capacity Building
Worcester Roots Project 4 King St... Worcester, MA 01610	05-0566468	501(c)(3)	20,000				Capacity Building
Worcester Community Action... Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	39,500				Program Operating
Catholic Charities Worcester County... 10 Hammond Street Worcester, MA	04-2103979	501(c)(3)	28,337				Donor Designated
Catholic Charities Worcester County... 10 Hammond Street Worcester, MA	04-2103979	501(c)(3)	7,965				Donor Desg.3rd Pty
United Way of Massachusetts Bay... 51 Sleeper St. Boston, MA	04-2382233	501(c)(3)	27,904				Donor Designated
United Way of Massachusetts Bay... 51 Sleeper St. Boston, MA	04-2382233	501(c)(3)	458				Donor Desg.3rd Pty
American Red Cross 2000 Century... Drive Worcester, MA 01606	53-0196605	501(c)(3)	22,375				Donor Designated
American Red Cross 2000 Century... Drive Worcester, MA 01606	53-0196605	501(c)(3)	2,625				Donor Desg.3rd Pty
Boy Scouts - Mohagan Council, Inc... 19 Harvard St. Worcester, MA	04-2105867	501(c)(3)	20,468				Donor Designated
Boy Scouts - Mohagan Council, Inc... 19 Harvard St. Worcester, MA	04-2105867	501(c)(3)	2,026				Donor Desg.3rd Pty
Boys & Girls Club of Worcester, Inc... 65 Tainter Street Worc., MA 01610	04-2105851	501(c)(3)	20,883				Donor Designated
Boys & Girls Club of Worcester, Inc... 65 Tainter Street Worc., MA 01610	04-2105851	501(c)(3)	1,280				Donor Desg.3rd Pty
Jewish Federation of Cntrl MA 633... Salisbury St. Worc. MA 01609	04-2104363	501(c)(3)	21,800				Donor Designated
2 Enter total number of Section 501(c)(3) and government organizations						15	
3 Enter total number of other organizations						0	

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Cat. No 51026W

Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
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OMB No 1545-0047

2008

**Open to Public
Inspection**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number

04 : 2104017

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

(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 RI 50 Valley St. Providence, RI 02909	05-0276059	501(c)(3)	20,977				Donor Designated
United Way of RI 50 Valley St. Providence, RI 02909	05-0276059	501(c)(3)	663				Donor Desg.3rd Pty
Friendly House, Inc., 36 Wall Street Worcester, MA 01604	04-2104239	501(c)(3)	19,771				Donor Designated
Friendly House, Inc., 36 Wall Street Worcester, MA 01604	04-2104239	501(c)(3)	52				Donor Desg.3rd Pty
United Way of Tri-County 46 Park St. Framingham, MA 01702	04-2104231	501(c)(3)	18,311				Donor Designated
United Way of Tri-County 46 Park St. Framingham, MA 01702	04-2104231	501(c)(3)	577				Donor Desg.3rd Pty
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	15,304				Donor Designated
Youth Opportunities Upheld, Inc., 81 Plantation Street Worcester, MA	23-7112665	501(c)(3)	104				Donor Desg.3rd Pty
YWCA of Central Massachusetts 1 Salem Square Worcester, MA 01608	04-2105873	501(c)(3)	15,204				Donor Designated
United Way of Grrr Plymouth Cnty 928 W. Chester St. Brockton, MA	04-2103940	501(c)(3)	13,277				Donor Designated
YMCA of Central Massachusetts 766 Main Street Worcester, MA	04-2105885	501(c)(3)	7,880				Donor Designated
YMCA of Central Massachusetts 766 Main Street Worcester, MA	04-2105885	501(c)(3)	5,057				Donor Desg.3rd Pty
YNA Care Network, Inc. 120 Thomas Street Worcester, MA 01608	04-2947495	501(c)(3)	11,449				Donor Designated
YNA Care Network, Inc. 120 Thomas Street Worcester, MA 01608	04-2947495	501(c)(3)	1,430				Donor Desg.3rd Pty
Community Healthlink, Inc. 72 Jaques Avenue Worcester, MA	04-2626179	501(c)(3)	12,695				Donor Designated

2 Enter total number of Section 501(c)(3) and government organizations 15

3 Enter total number of other organizations 0

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

Cat. No. 51026W

Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

United Way of Central Massachusetts, Inc.

Continuation Sheet for Schedule I (Form 990)

► Attach to Form 990 to list additional information for
Part II and Part III, Schedule I (Form 990).

OMB No. 1545-0047

2008

**Open to Public
Inspection**

Employer identification number

04 : 2104017

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

(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
Children's Friend, Inc., 21 Cedar Street Worcester, MA 01609	04-2105856	501(c)(3)	9,500				Donor Designated
Children's Friend, Inc., 21 Cedar Street Worcester, MA 01609	04-2105856	501(c)(3)	1,456				Donor Desg.3rd Pty
UW - North Central Mass., Inc. 285 John Fitch Hwy., Fitchburg, MA	04-2233021	501(c)(3)	9,562				Donor Designated
UW - North Central Mass., Inc. 285 John Fitch Hwy., Fitchburg, MA	04-2233021	501(c)(3)	1,151				Donor Desg.3rd Pty
Big Brothers Big Sisters. Cntrl. MA/Metro West Worcester, MA	04-2317926	501(c)(3)	10,067				Donor Designated
Big Brothers Big Sisters. Cntrl. MA/Metro West Worcester, MA	04-2317926	501(c)(3)	631				Donor Desg.3rd Pty
UW - Southbridge, Sturbridge and Charlton 50 Elm St. Southbridge, MA	04-2308155	501(c)(3)	8,779				Donor Designated
UW - Southbridge, Sturbridge and Charlton 50 Elm St. Southbridge, MA	04-2308155	501(c)(3)	1,651				Donor Desg.3rd Pty
Nativity School of Worcester, 10 Irving St. Worcester, MA 01609	03-0385377	501(c)(3)	10,120				Donor Designated
Guild Of St. Agnes 133 Granite Street Worcester, MA 01604	04-2104267	501(c)(3)	8,765				Donor Designated
Guild Of St. Agnes 133 Granite Street Worcester, MA 01604	04-2104267	501(c)(3)	1,300				Donor Desg.3rd Pty
Bancroft School 110 Shore Dr. Worcester, MA 01605	04-2103861	501(c)(3)	9,700				Donor Designated
Pernet Family Health Service, Inc., 237 Millbury Street Worcester, MA	04-2453851	501(c)(3)	8,833				Donor Designated
Pernet Family Health Service, Inc., 237 Millbury Street Worcester, MA	04-2453851	501(c)(3)	386				Donor Desg.3rd Pty
Worcester Youth Center, Inc., 27 Chandler St. Worcester, MA 01609	04-3245867	501(c)(3)	9,216				Donor Designated

2 Enter total number of Section 501(c)(3) and government organizations 15

3 Enter total number of other organizations 0

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Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
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OMB No. 1545-0047

2008

**Open to Public
Inspection**

Name of the organization

United Way of Central Massachusetts, Inc.

Employer identification number

04-2104017

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

(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
Mary Queen of the Rosary Parish 60 Maple St. Spencer, MA 01562	04-2106689	501(c)(3)	8,840				Donor Designated
Family Health Center of Worcester, Inc. 26 Queen Street Worcester, MA 01610	04-2485308	501(c)(3)	8,725				Donor Designated
Worcester County Food Bank 474 Boston Turnpike Shrewsbury MA	04-3071457	501(c)(3)	5,494				Donor Designated
Worcester County Food Bank 474 Boston Turnpike Shrewsbury MA	04-3071457	501(c)(3)	2,043				Donor Desg.3rd Pty
AIDS Project Worcester 85 Green Street Worcester, MA 01604	04-2970467	501(c)(3)	6,277				Donor Designated
AIDS Project Worcester 85 Green Street Worcester, MA 01604	04-2970467	501(c)(3)	1,039				Donor Desg.3rd Pty
Girls Incorporated of Worcester 125 Providence Street Worcester, MA	04-2123666	501(c)(3)	7,075				Donor Designated
Girls Incorporated of Worcester 125 Providence Street Worcester, MA	04-2123666	501(c)(3)	130				Donor Desg.3rd Pty
Jewish Family Service of Worcester, Inc. 646 Salisbury Street Worcester, MA	04-2104350	501(c)(3)	6,614				Donor Designated
Jewish Family Service of Worcester, Inc. 646 Salisbury Street Worcester, MA	04-2104350	501(c)(3)	420				Donor Desg.3rd Pty
St. Francis Episcopal Church 70 Highland St. Holden, MA 01520	04-3095047	501(c)(3)	7,020				Donor Desg.3rd Pty
Elder Services of Worcester Area, Inc. 411 Chandler St. Worcester, MA	04-2545221	501(c)(3)	6,461				Donor Designated
Elder Services of Worcester Area, Inc. 411 Chandler St. Worcester, MA	04-2545221	501(c)(3)	503				Donor Desg.3rd Pty
Central MA Housing Alliance, Inc. Bellevue Street Worcester, MA	04-2791448	501(c)(3)	6,602				Donor Designated
Clark University 950 Main Street Worcester, MA 01610	04-2111203	501(c)(3)	6,500				Donor Designated

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

15

3 Enter total number of other organizations

0

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Schedule I-1 (Form 990) 2008

**SCHEDULE I-1
(Form 990)**

Department of the Treasury
Internal Revenue Service

Name of the organization

United Way of Central Massachusetts, Inc.

Continuation Sheet for Schedule I (Form 990)

▶ Attach to Form 990 to list additional information for
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2008

**Open to Public
Inspection**

Employer identification number

04 2104017

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

(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
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	5,640				Donor Designated
Worcester Community Action Council 484 Main Street, Worc., MA	04-2382160	501(c)(3)	650				Donor Desg.3rd Pty
The CASA Project 100 Grove Street, Worcester, MA 01605	04-2711865	501(c)(3)	4,627				Donor Designated
The CASA Project 100 Grove Street, Worcester, MA 01605	04-2711865	501(c)(3)	942				Donor Desg.3rd Pty
Fallon Clinic Foundation, Inc. 100 Front Street FL 14 Worcester, MA	22-2912515	501(c)(3)	5,400				Donor Designated
Abby Kelley Foster House 52 High St. Worcester, MA 01609	04-2648411	501(c)(3)	2,849				Donor Designated
Abby Kelley Foster House 52 High St. Worcester, MA 01609	04-2648411	501(c)(3)	2,400				Donor Desg.3rd Pty
Junior Achievement of Central MA 484 Main St. Worcester, MA 01608	04-2797686	501(c)(3)	4,390				Donor Designated
Junior Achievement of Central MA 484 Main St. Worcester, MA 01608	04-2797686	501(c)(3)	780				Donor Desg.3rd Pty
Bishop's Food - Partners in Charity 49 Elm Street, Worc. MA 01609	04-2106689	501(c)(3)	5,000				Donor Designated
Jewish Big Bros. & Big Sis. of Gr. Boston 333 Nahanton St Newton Ct.	04-2104354	501(c)(3)	5,000				Donor Designated
Worcester Center for Performing Arts 554 Main St. Worcester, MA	05-0521735	501(c)(3)	5,000				Donor Designated
Junior Achievement of Central MA 484 Main St. Worcester, MA 01608	04-2797686	501(c)(3)	39,500				Program Operating

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

3 Enter total number of other organizations

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

Cat. No. 51026W

Schedule I-1 (Form 990) 2008

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

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.

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2008

**Open to Public
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Name of the organization

Employer identification number

United Way of Central Massachusetts, Inc.

04

2104017

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed 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 | ☐ Housing allowance or residence for personal use |
| ☐ Travel for companions | ☐ Payments for business use of personal residence |
| ☐ Tax indemnification and gross-up payments | ☐ Health or social club dues or initiation fees |
| ☐ Discretionary spending account | ☐ 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 of the expenses described above? If "No," complete Part III to explain

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

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 | ☐ Written employment contract |
| ☐ Independent compensation consultant | ☐ Compensation survey or study |
| ☐ Form 990 of other organizations | ☒ 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.

Only 501(c)(3) and 501(c)(4) organizations 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.

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.

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

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

Yes No

1b

2

4a

4b

4c

5a

5b

6a

6b

7

8

✓

✓

✓

✓

✓

✓

✓

✓

✓

Part III **Supplemental Information**

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

The Executive Committee acts as a Compensation Committee recommending any changes to the President/CEO salary. Any recommendations are subject to full

Board of Directors approval.

SCHEDULE L
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions With Interested Persons

▶ Attach to Form 990 or Form 990-EZ.
▶ To be completed by organizations that answered
"Yes" on Form 990, Part IV, line 25a, 25b, 26, 27, 28a, 28b, or 28c,
or Form 990-EZ, Part V, line 38a or 40b.

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Part I Excess Benefit Transactions (section 501(c)(3) and section 501(c)(4) organizations only).

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b.

1	(a) Name of disqualified person	(b) Description of transaction	(c) Corrected?	
			Yes	No

- 2 Enter the amount of tax imposed on the organization managers or disqualified persons during the year under section 4958 ▶ \$ _____
- 3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization ▶ \$ _____

Part II Loans to and/or From Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 26, or Form 990-EZ, Part V, line 38a.

(a) Name of interested person and purpose	(b) Loan to or from the organization?		(c) Original principal amount	(d) Balance due	(e) In default?		(f) Approved by board or committee?		(g) Written agreement?	
	To	From			Yes	No	Yes	No	Yes	No
Total ▶ \$ _____										

Part III Grants or Assistance Benefitting Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance

Part IV Business Transactions Involving Interested Persons.

To be completed by organizations that answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
Maurice Boisvert	Board Member	180,861	Grants/Donor Designations		✓
Linda A. Cavaoli	Board Member	313,496	Grants/Donor Designations		✓
Laurie B. Ross, Ph.D.	Board Member	73,998	Grants/Donor Designations		✓

**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.

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2008

**Open to Public
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United Way of Central Massachusetts

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2104017

Part III, 4d - Other Programs -

Mass 2-1-1 - United Way of Central Massachusetts has partnered with other United Way's across the state, to establish Mass 2-1-1 to help with non-life threatening needs. 2-1-1 is an easy to remember telephone number that connects callers to information about health and human services available in their community. It serves as a resource for finding government benefits and services, non-profit organizations, support groups, volunteer opportunities, donation programs, and other local resources.

AFL-CIO Labor Community Services Program - The AFL-CIO Labor Community Services Program coordinates many programs to benefit members of organized labor, their families and the community at large. Members of organized labor participate in United Way's Day of Caring, organize the Handicapped Ramp Program, NALC food drive, the Holiday toy drive and other special projects. One of the most important roles of the Labor Community Services Program is to design and provide training sessions for union members, their families and other community partners. Volunteers from NALC Branch 12 delivered 417,228 pounds of food to organizations serving the hungry in Central Massachusetts – the largest amount to date.

Community Services Program

Volunteer Center - The United Way of Central Massachusetts supports a Volunteer Center internal to its operations. Since 1967, the Volunteer Center has been the primary portal for community members to engage in volunteerism. The Center is an affiliate member of the Hands on Network and offers an array of services that build the capacity for effective volunteering. The Center recruits volunteers for organizations, provides training opportunities, information and referral, placement services, recognition activities and participates in strategic initiatives that mobilize volunteers to meet local needs. The Center also manages Volunteer Solutions an online database of volunteer opportunities in central Massachusetts. The following list represents unique volunteer opportunities offered by the Center.

EITC - Through the Earned Income Tax Credit Initiative, UWCM is addressing Financial Stability by helping taxpayers claim federal rebates. We are part of the Worcester EITC Coalition, which is working to create awareness about the EITC and engage volunteers to help prepare taxes for free. The Coalition recruits volunteers to serve at VITA sites and helps

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people claim eligible tax credits. We are also working to build awareness about financial issues such as predatory lending practices, pay day loans, and predatory tax preparation services that further hinder an individual's ability to save and build assets.

Calendar Program - A part of the Hands On Network model of volunteer engagement, a calendar program offers volunteers a monthly menu of "done in a day" projects that meet their interest and fit their schedule. The model also uses volunteers who are specially trained to lead other volunteers in service. A calendar program focuses on team oriented volunteering on a flexible basis.

Youth Leadership Institute - This intensive program is designed to provide youth with the encouragement, peer networks and leadership skills necessary for them to make meaningful contributions to their communities and begin a life-long journey of leadership and service. The institute combines classroom instruction with community service activities.

Day of Caring - The Volunteer Center at United Way of Central Massachusetts coordinates many events to promote volunteerism and leadership. On September 16, 2008, we hosted our Annual Day of Caring, the largest one-day volunteer drive in the entire region, where 1,097 people took to the streets of central Massachusetts to volunteer at dozens of locations for the day.

Donor Designations - The United Way of Central Massachusetts facilitates the collection and distribution of donor-designated pledges and gifts to other 501(c)(3) nonprofit organizations. 392 agencies received donations totaling \$768,126 in FY 2009.

**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 of Central Massachusetts, Inc.

Employer identification number

04

2104017

Part VI - Section A - Line 10: The Finance Committee reviewed a draft version of the Form 990 and all supporting schedules at its December 7, 2009 meeting. The full Board of Directors received a copy of the final version of the Form 990 and all supporting schedules to review in advance of it December 16, 2009 meeting. The document review is included as an agenda item for that meeting.

Part VI - Section A - Line 11

Mark P. Bilotta, Colleges of Worcester Consortium Inc. 484 Main Street, Suite 500, Worcester, MA 01608

Maria Addison Director, Quinsigamond Community College, 670 West Boylston Street, Worcester, MA 01606-2092

Todd M. Bailey, Fallon Community Health Plan, 10 Chestnut Street, Worcester, MA 01608

Maurice Boisvert, YOU, Inc. 81 Plantation Street, Worcester, MA 01604

Michael F. Buckley, The Hanover Insurance Group 440 Lincoln Street, E10 Worcester, MA 01653

Brian Bullock, Town of Holden, 1204 Main Street Holden, MA 01520

Jack P. Calareso, Ph.D., Anna Maria College, 50 Sunset Lane Paxton, MA 01612

Joseph P. Carlson, United Steel Workers of America - District 4 100 Medway Road, Ste. 403, Milford, MA 01751

Linda A. Cavaoli, YWCA of Central MA, Inc. 1 Salem Square, Worcester, MA 01608

Brian M. Chandley, Southbridge Savings Bank, 253-57 Main Street, P.O. Box 370, Southbridge, MA 0155

Mark C. Crandall, TD Bank, 370 Main Street, Worcester, MA 01608

Sandra Ellis, Massachusetts Nurses Association, 12 County Road, Worcester, MA 01604

Joseph D. Freitas, The Hanover Insurance Group, Inc., 440 Lincoln Street, E10, Worcester, MA 01653

Bruce Gaultney, Worcester Telegram & Gazette, 20 Franklin Street, P.O Box 15012, Worcester, MA 01615

Dennis L. Irish, Vanguard Health Systems NE Market, 132 Turnpike Rd., Ste. 200, Southborough, MA 01772

Nancy Kidd Brown, Unum, 18 Chestnut Street, Worcester, MA 01608

Glenn Knowlton, Saint Gobain Abrasives, 1 New Bond Street, Worcester, MA 01615

Susan M. Mailman, Coghlin Electrical Contractors, Inc., 100 Prescott Street, Worcester, MA 01605

Michael J. Mulrain, Polar Beverages, 1001 Southbridge Street, Worcester, MA 01610

Wendy O'Leary, 65 Chapin Road, Holden, MA 01520

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

Cat No 51056K

Schedule O (Form 990) 2008

Name of the organization

Employer identification number

United Way of Central Massachusetts, Inc.

04

2104017

Marcy Reed, National Grid, 40 Sylvan Road, Waltham, MA 02451

Laurie B. Ross, Ph.D., Dept. of Intl' Dev., Community & Environ. Clark University 950 Main Street Worcester, MA 01610

Elizabeth V. Young, 6 Rutland Circle, Worcester, MA 01609-1630

**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 of Central Massachusetts, Inc.

Employer identification number

04 : 2104017

Part VI - Section B - Line 12 c - The Board of Directors annually sign a conflict of interest statement listing affiliations with other organizations that could potentially pose a conflict of interest. Board members abstain from voting on issues or recommendations related to those organizations.

Part VI - Section B - Line 15 b - The Executive Committee conducts an annual performance review of the CEO and recommends any compensation adjustments to the full Board of Directors. Compensation for the Vice President of Finance and Operations is determined by the CEO. All compensation is included in the organization's budget which is reviewed by the Finance Committee and approved by the full Board of Directors.

Part VI - Section C - Line 19 - United Way of Central Massachusetts posts its annual audited financial statements and its Form 990 and all supporting schedules on its web site. The documents are also available for public review at the organization's office. The conflict of interest statements are not made available directly to the public, but minutes from all board meetings including all votes taken are available to the public at the United Way of Central Massachusetts office.

Continuation of Schedule I - Part IV - Donor Designations - Organizations receiving donor designations have been screened to verify 501(c)(3) status and Patriot Act compliance.

Minor Capital Grants - Minor capital grants of up to \$5,000 were also awarded by a competitive process based on need. Receipts of final purchases are required as documentation. The grants are approved by the full Board of Directors.

Name of the organization

Employer identification number

United Way of Central Massachusetts, Inc.

04

2104017

Schedule I Codes and Definitions (column h):

Program Operating - A restricted grant made to an agency in support of the costs associated with a specific program that it operates.

Minor Capital Grant - Grants up to \$5,000 awarded for purchases of minor capital items.

Capacity Building - A restricted grant in support of costs associated with building organizational capacity.

Donor Designated - An unrestricted grant made to an agency at the direction of the donor(s) in support of its general operating costs.

Donor Desg, 3rd Pty - An unrestricted grant made to an agency, at the direction of the donor(s), collected and paid directly to the agency by a 3rd party, in support of its general operating costs.

Overhead Calculation:

The standard formula for calculating the Overhead ratio among United Ways is as follows:

Core Form, Part IX, line 25, Column C (M&G Exp.) + Column D (Fundraising Exp.) divided by

Core Form, Part VIII, Line 12, Column A (Total Revenue)

For United Way of Central Massachusetts this calculation is as follows: $(662,523 + 866,041) / 6,264,378 = 24.40\%$

This percentage represents an increase of 2.52% due to the negative impact of its investment income during FY 2009.

The actual administrative and fundraising expenses decreased by \$50,947 from the previous fiscal year.

***United Way of Central
Massachusetts, Inc.***

*Financial Statements and Supplementary
Information as of and for the Years Ended
June 30, 2009 and 2008 and Independent
Auditors' Report*

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

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STOWE & DEGON LLC
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
United Way of Central Massachusetts, Inc.
Worcester, Massachusetts

We have audited the accompanying statements of financial position of the United Way of Central Massachusetts, Inc. (the Organization; a non-profit organization) as of June 30, 2009 and 2008 and the related statements of activities, functional expenses and cash flows for the years then ended. These financial statements are the responsibility of the Organization's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial presentation. We believe that our audits provide a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the United Way of Central Massachusetts, Inc. as of June 30, 2009 and 2008, and the results of its operations, and its cash flows for the years then ended in conformity with accounting principles generally accepted in the United States of America.

Stowe & Degon LLC

October 26, 2009

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENTS OF FINANCIAL POSITION JUNE 30, 2009 AND 2008

	2009	2008
ASSETS		
Cash and cash equivalents	\$ 529,599	\$ 1,081,490
Pledges receivable, net	2,136,426	2,392,317
Accounts receivable and other assets	123,861	50,888
Investments	4,838,170	5,947,148
Beneficial interest in trust (Note 14)	449,856	601,152
Property and equipment, net	<u>129,192</u>	<u>152,587</u>
Total Assets	<u>\$ 8,207,104</u>	<u>\$ 10,225,582</u>
LIABILITIES AND NET ASSETS		
Accounts payable	\$ 14,134	\$ 15,414
Accrued expenses	193,411	131,666
Community impact grants payable (Note 13)	3,754,843	3,976,786
Women's initiative grants payable	180,356	175,000
Designations payable	<u>340,683</u>	<u>511,838</u>
Total Liabilities	<u>4,483,427</u>	<u>4,810,704</u>
Net Assets:		
Unrestricted	3,447,764	5,220,646
Temporarily restricted	215,913	134,232
Permanently restricted	<u>60,000</u>	<u>60,000</u>
Total Net Assets	<u>3,723,677</u>	<u>5,414,878</u>
Total Liabilities and Net Assets	<u>\$ 8,207,104</u>	<u>\$ 10,225,582</u>

See notes to financial statements.

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2009

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Support and Revenue:				
Campaign Revenue	\$ 6,043,269	\$ 476,777	\$ -	\$ 6,520,046
Less:				
Designations	(768,126)	-	-	(768,126)
Administrative fees	(51,741)	-	-	(51,741)
Allowance for uncollectible pledges	(191,508)	-	-	(191,508)
Net assets released from restrictions	431,203	(431,203)	-	-
Net Campaign Revenue	5,463,097	45,574	-	5,508,671
Investment income (net of expenses)	82,142	-	-	82,142
Loss on sale of investments	(755,517)	-	-	(755,517)
Unrealized loss on investments	(1,130,279)	-	-	(1,130,279)
Change in beneficial interest in trust (Note 14)	(127,866)	-	-	(127,866)
Donor designation fees	73,858	-	-	73,858
Grant and sponsorship income	277,404	199,690	-	477,094
Rental income (loss) net of expense	(3,375)	-	-	(3,375)
Net assets released from restrictions	163,583	(163,583)	-	-
Total Support and Revenue	4,043,047	81,681	-	4,124,728
Expenses:				
Community Impact Grants (Note 13)	2,965,258	-	-	2,965,258
Women's Initiative Grants (Note 13)	188,556	-	-	188,556
Other Grants/Sponsorships	179,172	-	-	179,172
Program Services:				
Community Services	117,213	-	-	117,213
Mass 211	79,320	-	-	79,320
Building Brighter Futures	13,699	-	-	13,699
Labor Community Services	104,604	-	-	104,604
Community Impact	343,763	-	-	343,763
Women's Initiative Community Impact	104,776	-	-	104,776
Worcester Youth Capacity Project	227,880	-	-	227,880
Other Programs	53,335	-	-	53,335
Total Program Services	1,044,590	-	-	1,044,590
Supporting Services	1,438,353	-	-	1,438,353
Total Expenses	5,815,929	-	-	5,815,929
Increase (Decrease) in Net Assets	(1,772,882)	81,681	-	(1,691,201)
Net Assets - beginning	5,220,646	134,232	60,000	5,414,878
Net Assets - ending	\$ 3,447,764	\$ 215,913	\$ 60,000	\$ 3,723,677

See notes to financial statements

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENT OF ACTIVITIES YEAR ENDED JUNE 30, 2008

	Unrestricted	Temporarily Restricted	Permanently Restricted	Total
Support and Revenue:				
Campaign Revenue	\$ 6,187,383	\$ 409,540	\$ -	\$ 6,596,923
Less:				
Designations	(873,951)	-	-	(873,951)
Administrative fees	(52,879)	-	-	(52,879)
Allowance for uncollectible pledges	(172,570)	-	-	(172,570)
Net assets released from restrictions	473,536	(473,536)	-	-
Net Campaign Revenue	5,561,519	(63,996)	-	5,497,523
Investment income (net of expenses)	72,662	-	-	72,662
Gain on sale of investments	312,691	-	-	312,691
Unrealized gain on investments	406,243	-	-	406,243
Change in beneficial interest in trust (Note 14)	(34,956)	-	-	(34,956)
Donor designation fees	42,437	-	-	42,437
Grant and sponsorship income	288,777	81,802	-	370,579
Rental income (loss) (net of expense)	(4,104)	-	-	(4,104)
Net assets released from restrictions	89,802	(89,802)	-	-
Total Support and Revenue	6,735,071	(71,996)	-	6,663,075
Expenses:				
Community Impact Grants (Note 13)	3,153,978	-	-	3,153,978
Women's Initiative Grants (Note 13)	186,000	-	-	186,000
Other Grants/Sponsorships	58,665	-	-	58,665
Program Services				
Community services	95,670	-	-	95,670
Mass 211	76,267	-	-	76,267
Building Brighter Futures	1,406	-	-	1,406
Labor Community Services	92,804	-	-	92,804
Community Impact	308,613	-	-	308,613
Women's Initiative Community Impact	142,824	-	-	142,824
Worcester Youth Capacity Project	243,453	-	-	243,453
Total Program Services	961,037	-	-	961,037
Supporting Services	1,526,973	-	-	1,526,973
Total Expenses	5,886,653	-	-	5,886,653
Increase (Decrease) in Net Assets	848,418	(71,996)	-	776,422
Net Assets - beginning	4,372,228	206,228	60,000	4,638,456
Net Assets - ending	\$ 5,220,646	\$ 134,232	\$ 60,000	\$ 5,414,878

See notes to financial statements

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2009

	PROGRAM SERVICES										Total
	Community Services	Building Brighter Futures	Labor Community Services	Women's Initiative Impact	Worcester Youth Capacity Project	Other Programs	Total Program Services	Admin. & Finance	Marketing Fundraising	Total Support Services	
Salaries and related expenses											
Salaries	\$ 64,780	\$ -	\$ 310	\$ 52,829	\$ 202,804	\$ 46,165	\$ 44,743	\$ 90,482	\$ 368,944	\$ 828,289	\$ 1,240,420
Payroll taxes	4,673	-	58	3,978	14,350	3,128	3,427	6,339	26,493	58,755	88,369
Health and other fringe benefits	11,384	-	148	13,560	64,154	10,364	9,547	20,880	82,256	188,975	298,332
Total salaries and related expenses	81,037	-	1,016	70,367	281,308	59,657	57,717	117,701	477,693	1,076,019	1,627,121
Other expenses.											
Professional fees and contract services	1,701	78,995	11,000	76	1,255	71	67,394	50,783	158	13,090	239,282
Internal program grants and sponsorships	-	-	-	-	-	-	100,000	-	-	-	125,000
Directors and Officers Insurance	-	-	-	-	-	-	-	3,103	-	-	3,103
Supplies	3,652	-	-	21,740	1,207	343	843	3,745	1,308	4,231	49,343
Telephone	1,053	-	-	730	3,406	685	-	4,676	1,515	4,529	10,720
Postage	2,468	-	-	393	761	791	35	2,914	1,122	6,318	10,354
Occupancy	6,897	-	-	4,783	22,303	4,481	-	31,330	9,919	29,654	70,903
Promotion and publicity	1,605	325	-	790	1,286	489	-	1,344	5,468	45,291	56,678
Programs and events	11,116	-	-	-	-	33,678	-	-	11,807	34,044	45,851
Travel and professional development	445	-	1,683	837	8,804	4	1,891	7,223	892	5,789	13,904
Organization dues and subscriptions	188	-	-	-	81	-	-	1,776	162	711	2,649
Equipment rental and maintenance	792	-	-	550	3,113	516	-	8,390	1,139	5,598	15,127
Miscellaneous	-	-	-	-	-	-	-	373	-	250	623
Total other expenses	29,917	79,320	12,683	29,899	42,216	41,058	170,163	115,657	33,690	149,505	298,652
Total expenses before depreciation and national and state dues	110,954	79,320	13,699	100,266	323,524	100,715	227,880	596,282	151,191	627,198	1,374,671
Depreciation	2,264	-	-	1,569	7,321	1,469	-	10,045	3,256	9,735	23,036
National and state dues	3,995	-	-	2,769	12,918	2,592	-	17,725	5,745	17,176	40,646
Total expenses	\$ 117,213	\$ 79,320	\$ 13,699	\$ 104,604	\$ 343,763	\$ 104,776	\$ 227,880	\$ 624,052	\$ 160,192	\$ 654,109	\$ 1,438,353
See notes to financial statements.											\$ 2,482,943

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENT OF FUNCTIONAL EXPENSES YEAR ENDED JUNE 30, 2008

	PROGRAM SERVICES										Total
	Community Services	Building Brighter Futures	Labor Community Services	Women's Initiative Community Impact	Worcester Youth Capacity Project	Total Program Services	Admin. & Finance	Marketing	Fundraising	Support Services	
Salaries and related expenses											
Salaries	\$ 50,937	\$ -	\$ 1,067	\$ 201,451	\$ 51,667	\$ 43,239	\$ 395,741	\$ 85,985	\$ 370,656	\$ 804,906	\$ 1,200,647
Payroll taxes	3,573	-	58	14,003	3,585	3,306	28,106	5,816	26,746	56,273	84,379
Health and other fringe benefits	9,979	-	272	46,006	11,175	9,235	88,660	78,283	19,239	177,787	266,447
Total salaries and related expenses	64,489	-	1,397	261,460	66,427	55,780	512,507	111,040	477,667	1,038,966	1,551,473
Other expenses											
Professional fees and contract services	655	75,667	-	76	325	30,946	84,651	43,274	2,994	34,083	272,671
Internal program grants and sponsorships	-	-	-	-	-	-	100,000	-	-	-	100,000
Directors and Officers Insurance	-	-	-	-	-	-	-	7,851	-	-	7,851
Supplies	3,546	-	-	18,731	2,589	350	26,050	4,861	17,542	6,900	55,353
Telephone	884	-	-	883	3,800	567	-	5,981	2,270	4,824	13,075
Postage	2,068	-	-	453	715	1,575	-	2,344	1,271	9,408	13,023
Occupancy	4,793	-	4	4,793	20,610	3,078	-	32,857	12,326	26,169	71,352
Promotion and publicity	3,460	600	-	431	2,476	4,824	-	1,896	9,615	66,153	77,664
Programs and events	11,023	-	-	-	-	32,402	-	-	17,614	43,884	61,498
Travel and professional development	1,236	-	-	1,861	3,733	378	9,396	8,311	2,230	9,454	19,995
Organization dues and subscriptions	-	-	-	-	443	-	-	1,863	188	1,142	3,193
Equipment rental and maintenance	605	-	5	605	2,602	389	-	8,927	1,555	5,468	15,950
Miscellaneous	-	-	-	-	450	-	-	1,123	-	239	1,362
Total other expenses	28,270	76,267	9	27,833	37,743	74,509	187,673	67,605	207,724	394,617	826,921
Total expenses before depreciation and national and state dues	92,759	76,267	1,406	90,787	299,203	140,936	944,811	569,547	178,645	685,391	1,433,583
Depreciation	2,911	-	-	2,017	9,410	1,888	-	12,911	4,185	12,513	29,609
National and state dues	-	-	-	-	-	-	-	63,781	-	-	63,781
Total expenses	\$ 95,670	\$ 76,267	\$ 1,406	\$ 92,804	\$ 308,613	\$ 142,824	\$ 961,037	\$ 646,239	\$ 182,830	\$ 697,904	\$ 1,526,973
See notes to financial statements											\$ 2,488,010

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

STATEMENTS OF CASH FLOWS YEARS ENDED JUNE 30, 2009 AND 2008

	2009	2008
CASH FLOWS FROM OPERATING ACTIVITIES:		
Increase (decrease) in net assets	\$ (1,691,201)	\$ 776,422
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation	35,659	45,835
Allowance for uncollectible pledges	7,184	(78,304)
Realized and unrealized net loss (gain) on investments	1,885,796	(718,934)
Changes in operating assets and liabilities:		
Pledges receivable	248,707	55,159
Accounts receivable and other assets	(72,973)	57,538
Accounts payable	(1,280)	(69,158)
Accrued expenses	61,745	18,642
Community impact grants payable	(221,943)	(117,758)
Women's initiative grants payable	5,356	(4,933)
Designations payable	(171,155)	82,955
Net cash provided by operating activities	85,895	47,464
CASH FLOWS FROM INVESTING ACTIVITIES:		
Acquisition of property and equipment	(12,264)	(2,083)
Acquisition of investments	(5,532,818)	(7,442,973)
Proceeds from sale of investments	4,756,000	7,010,579
Change in beneficial interest trust	151,296	60,470
Net cash used in investing activities	(637,786)	(374,007)
NET DECREASE IN CASH AND CASH EQUIVALENTS	(551,891)	(326,543)
CASH AND CASH EQUIVALENTS, BEGINNING OF YEAR	1,081,490	1,408,033
CASH AND CASH EQUIVALENTS, END OF YEAR	\$ 529,599	\$ 1,081,490

See notes to financial statements.

UNITED WAY OF CENTRAL MASSACHUSETTS, INC.

NOTES TO FINANCIAL STATEMENTS YEARS ENDED JUNE 30, 2009 AND 2008

1. ORGANIZATION

United Way of Central Massachusetts (the "Organization") is a not-for-profit organization striving for excellence in meeting the human service needs of the community through the development and effective distribution of resources. The Organization is classified as a public charity and is exempt from federal income taxes under Section 501(c)(3) of the U.S. Internal Revenue Code.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of Presentation - The Organization reports information regarding its financial position and activities according to three classes of net assets; unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

Cash and Cash Equivalents - The Organization considers all highly liquid debt instruments purchased with maturities of three months or less to be cash equivalents. The Organization places its cash and cash equivalents with various financial institutions. At times such investments may be in excess of Federal Deposit Insurance Corporation (FDIC) insurance limits.

Investments - Investments in marketable securities with readily determinable fair values and all investments in debt securities are valued at their fair values in the statement of financial position. Unrealized gains and losses are included in the Statement of Activities.

Property and Equipment - Property and equipment are stated at cost or, if donated, at the approximate fair market value at the date of donation. The Organization follows the practice of capitalizing all expenditures for property and equipment in excess of \$1,000. Depreciation is provided on a straight-line basis over the following estimated useful lives:

	<u>YEARS</u>
Building and improvements	15 - 25
Equipment	3 - 5
Furniture and fixtures	10

Contributions - Contributions received are recorded as unrestricted, temporarily restricted, or permanently restricted support depending on the existence and/or nature of any donor restrictions. Time restricted contributions are reported as temporarily restricted support and reclassified to unrestricted net assets upon expiration of the time restriction.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Contributions (Continued) - Donors may designate their gifts to specific United Way affiliated and non-affiliated agencies. Non-affiliated agencies are required to provide the Organization with documentation of their tax-exempt status. Donor designations to specific agencies are not included in net campaign revenues and support or allocations to participating agencies in the accompanying Statements of Activities.

A substantial number of volunteers and corporations have donated significant time and services for which no amounts have been reflected in the financial statements. The Organization reflects only amounts for services that create or enhance non-financial assets, or that require specialized skills and are provided by individuals possessing those skills. No such services were donated during 2009 and 2008.

Designations - Agency-specific designations as specified by the donor are recorded upon receipt of the contribution and are reflected as an expense in the Statement of Activities and, until distributed to the agency, as a liability in the Statement of Financial Position.

Donated Assets - Donated marketable securities and other non-cash donations are recorded as contributions at their estimated fair value at the date of the donation.

Advertising - Advertising costs are generally charged to operations as incurred. These costs were approximately \$2,000 and \$4,700 in 2009 and 2008, respectively.

Estimates - The preparation of financial statements in conformity with accounting principles generally accepted in the United States requires management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. Although these estimates are based on management's knowledge of current events and actions it may undertake in the future, they may ultimately differ from actual results. The Organization's most significant estimate is the allowance for uncollectible pledges.

Reclassifications - Certain 2008 amounts have been reclassified to conform to the 2009 presentation.

3. PLEDGES RECEIVABLE

Pledges receivable consists of the following at June 30:

	2009	2008
Campaign 2008	\$ 2,071,114	\$ -
Campaign 2007	65,312	2,336,843
Campaign 2006	-	55,474
	<u>\$ 2,136,426</u>	<u>\$ 2,392,317</u>

Pledges receivable are shown net of an allowance for uncollectible pledges of \$597,431 and \$590,247 in 2009 and 2008, respectively.

4. INVESTMENTS

Investments are stated at fair value and consist principally of equity and debt securities. Fair values and unrealized appreciation at June 30, are summarized as follows:

	2009		
	Cost	Fair Value	Unrealized Appreciation/ (Depreciation)
Equity	\$ 1,881,034	\$ 2,062,684	\$ 181,650
Debt	<u>2,732,578</u>	<u>2,775,486</u>	<u>42,908</u>
	<u>\$ 4,613,612</u>	<u>\$ 4,838,170</u>	<u>\$ 224,558</u>

	2008		
	Cost	Fair Value	Unrealized Appreciation/ (Depreciation)
Equity	\$ 2,612,151	\$ 3,962,895	\$ 1,350,744
Debt	<u>1,980,160</u>	<u>1,984,253</u>	<u>4,093</u>
	<u>\$ 4,592,311</u>	<u>\$ 5,947,148</u>	<u>\$ 1,354,837</u>

The Organization recorded net losses of \$755,517 and net gains of \$312,691 from the sale of investments during 2009 and 2008, respectively. The Organization incurred investment custodial and advisory fees of \$38,468 and \$52,535, during 2009 and 2008, respectively.

5. PROPERTY AND EQUIPMENT

Property and equipment consist of the following:

	2009	2008
Building and Improvements	\$ 1,141,425	\$ 1,141,425
Equipment	421,300	409,036
Furniture and Fixtures	<u>204,916</u>	<u>204,916</u>
	1,767,641	1,755,377
Accumulated Depreciation	<u>(1,638,449)</u>	<u>(1,602,790)</u>
	<u>\$ 129,192</u>	<u>\$ 152,587</u>

Depreciation expense was \$35,659 and \$45,835 in 2009 and 2008, respectively.

6. LINE OF CREDIT

On October 31, 2001, the Organization entered into an unsecured line of credit agreement with an available borrowing limit of \$1,000,000. The line of credit bears interest at prime rate (3.25% at June 30, 2009). The line of credit expires in January 2010. There were no outstanding borrowings as of June 30, 2009 and 2008.

7. RESTRICTIONS ON ASSETS

Temporarily restricted net assets at June 30 are restricted for the following purposes:

	2009	2008
Future campaign revenue	\$ 20,000	\$ 20,000
Small capital grant awards	58,810	56,952
Ramp program	26,356	20,173
Investing in Girls	46,811	-
Facebook grant	2,000	-
Women's Initiative	61,936	37,107
	<u>\$ 215,913</u>	<u>\$ 134,232</u>

At June 30, 2009 and 2008, permanently restricted net assets of \$60,000 are in an endowment fund, the income from which is expendable to support any activities of the Organization.

8. NET ASSETS RELEASED FROM RESTRICTIONS

Temporarily restricted net assets were released for the following purposes:

	2009	2008
Future campaign revenue	\$ 20,000	\$ 10,000
Women's Initiative	376,561	436,106
Small capital grant awards	53,142	53,745
Programs and events	145,083	63,487
	<u>\$ 594,786</u>	<u>\$ 563,338</u>

9. GROSS CAMPAIGN REVENUE

Gross campaign revenue by campaign year (October 1 – September 30) consists of the following:

	Campaign 2009	Campaign 2008	Campaign 2007
June 30, 2009	\$ 20,000	\$ 6,420,524	\$ 79,522
June 30, 2008	-	20,000	6,507,070
June 30, 2007	-	-	10,000
	<u>\$ 20,000</u>	<u>\$ 6,440,524</u>	<u>\$ 6,596,592</u>

10. RENTAL INCOME

The Organization owns office condominium space, which it leased during 2009 and 2008. Gross rental payments received were \$53,487 and \$51,103 during 2009 and 2008, respectively. Rental income is shown net of condominium fees and other rental expenses of \$56,862 and \$55,207, during 2009 and 2008, respectively.

10. RENTAL INCOME (CONTINUED)

The carrying value of the property held for lease was as follows:

	2009	2008
Building and Improvements	\$ 191,095	\$ 191,095
Less: Accumulated Depreciation	<u>(172,919)</u>	<u>(166,710)</u>
	<u>\$ 18,176</u>	<u>\$ 24,385</u>

11. LEASE COMMITMENTS

The Organization leases office equipment under operating lease agreements. The office equipment leases expire at various times through February 2012. Total expense under the office equipment leases amounted to \$8,748 and \$9,327 in 2009 and 2008, respectively.

The following is a schedule of future minimum lease payments for the next three years as of June 30, 2009.

Year	Amount
2010	\$ 9,327
2011	7,373
2012	<u>1,200</u>
	<u>\$ 17,900</u>

12. EMPLOYEE BENEFIT PLAN

The Organization maintains a contributory retirement plan covering all eligible employees. Each year the Organization at its discretion may make an employer contribution to the plan. The employer's contribution is determined annually, by the Board of Directors. The employer's contribution charged to expense was approximately \$27,900 and \$33,700 in 2009 and 2008, respectively.

In addition, incorporated into the plan are the provisions of Section 401(k) of the Internal Revenue Code, which allows employees to contribute to their accounts on a pretax basis. The Organization may make a discretionary match contribution up to a maximum of 2% of employees' annual compensation. The match contribution for 2009 and 2008 was approximately \$15,900 and \$17,200, respectively.

13. COMMUNITY IMPACT AND WOMEN'S INITIATIVE

Community Impact grants of unrestricted funds to selected programs are determined annually by the Board of Directors based on recommendations from the Community Impact Committee. Women's Initiative grants and sponsorships are also determined by the Board of Directors based on recommendations from the Women's Initiative Community Investment Committee. Grants are payable on a monthly basis during subsequent fiscal years. Sponsorships are paid based on the timing of the sponsored events.

13. COMMUNITY IMPACT AND WOMEN'S INITIATIVE (CONTINUED)

In accordance with Statement of Financial Accounting Standards No. 116 "Accounting for Contributions Received and Contributions Made" the Organization recognizes the full amount of the committed grant as an expense in the year in which the commitment is made.

14. GREATER WORCESTER COMMUNITY FOUNDATION FUNDS

The following funds, except as discussed, are considered assets of the Greater Worcester Community Foundation ("GWCF") and therefore are not included in the financial statements of the United Way of Central Massachusetts, Inc. The information is included for disclosure purposes only.

The Arthur J. Remillard, Jr. Fund

The Arthur J. Remillard, Jr. Fund (AJR Fund) is a donor-designated fund established at the Greater Worcester Community Foundation ("GWCF") to provide financial support to the Organization. A three-person advisory board, consisting of the chief executive officer, a current or past president of the Board of Directors of United Way of Central Massachusetts, Inc. and a current or past president of the Board of Directors of the Greater Worcester Community Foundation, determines the annual pledge to the Organization. As of and for the years ended June 30, 2009 and 2008, the AJR Fund had a fair market value of \$487,814 and \$649,144, respectively.

United Way of Central Massachusetts Fund

In August of 1987 the Organization established the United Way of Central Massachusetts Fund ("the Fund") at GWCF. The purpose of the Fund is to provide additional financial support for participating agencies of the Organization and to underwrite administrative costs of the Organization. The Fund consists of an amount contributed by the Organization, having a market value of \$449,856 and \$601,152 as of June 30, 2009 and 2008, respectively. In accordance with the provisions of Statement of Financial Accounting Standards ("SFAS") No. 136 "Transfers of Assets to a Not-for-Profit Organization or Charitable Trust That Raises or Holds Contributions for Others", the Organization's initial contribution to the United Way of Central Massachusetts Fund (the "Fund") is reflected as an asset ("Beneficial interest in trust") on the Statement of Financial Position.

In addition to the original contribution by the Organization other significant contributions have since been received. The Organization and participating agencies are designated beneficiaries of these contributions, however variance power and ultimate control resides with GWCF board of directors. Accordingly, the market values of the contributions are reported as assets of GWCF. The market value of the assets included in the Fund and controlled by GWCF is equal to \$2,073,815 at June 30, 2009 and \$2,754,899 at June 30, 2008.

15. FAIR VALUE MEASUREMENTS

The Organization adopted the provisions of Statement of Financial Accounting Standards No. 157, "Fair Value Measurements" ("SFAS 157") for financial assets and liabilities recognized on a recurring basis. SFAS 157 defines fair value, establishes a framework for measuring fair value and expands the disclosure requirements for fair value measurements. The adoption of FAS 157 for financial assets and liabilities did not have a material impact on the Organization's financial statements.

In determining the fair value measurements of financial assets and liabilities, the Organization considered the principal and most advantageous market in which the Organization transacts and considered the assumptions that market participants would use when pricing the financial asset and liability. In accordance with SFAS 157, the Organization maximizes the use of observable inputs and minimizes the use of unobservable inputs when measuring fair value.

The hierarchies of inputs required by FAS 157 are as follows:

- Level 1: Input prices quoted in an active market for identical financial assets or liabilities.
- Level 2: Inputs other than prices quoted in Level 1, such as prices quoted for similar financial assets and liabilities in active markets, prices for identical assets and liabilities in markets that are not active or other inputs that are observable or can be corroborated by observable market data.
- Level 3: Input prices quoted that are significant to the fair value of the financial assets or liabilities which are not observable nor supported by an active market.

The following items are measured at fair value on a recurring basis at June 30, 2009:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Mutual funds	\$ 2,775,487	\$ -	\$ -	\$ 2,775,487
Equity securities	2,062,683	-	-	2,062,683
Beneficial interest in trust	-	-	449,856	449,856
	<u>\$ 4,838,170</u>	<u>\$ -</u>	<u>\$ 449,856</u>	<u>\$ 5,288,026</u>

The table below sets forth a summary of changes in the fair value of the Plan's level 3 assets for the year ended June 30, 2009.

	<u>Beneficial interest in trust</u>
Balance, beginning of year	\$ 601,152
Earnings and investment gains/losses, net of investment fees	(125,355)
Grants authorized	(23,430)
Administrative fees	<u>(2,511)</u>
Balance, end of year	<u>\$ 449,856</u>

16. CONTINGENCIES

The United Way of Central Massachusetts owns and occupies condominium space in a building in Worcester, Massachusetts. The Organization is the largest owner of the condominium space, owning fifteen percent. Due to the age of the building, the Organization may be subject to special assessments to maintain and repair the building. As of June 30, 2009, the Organization is unable to estimate the extent of or dollar amount of future special assessments. The special assessments, when they occur, may have a material impact on the Organization's financial statements.

The Organization may become involved in litigation or other claims in the ordinary course of business. Management is not aware of any claims that will have a material adverse effect on the financial condition of the Organization.

* * * * *



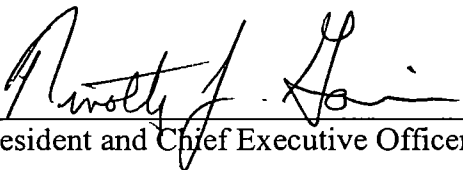
United Way of
Central Massachusetts

CEO/CFO Financial Statement Certification

CERTIFICATIONS

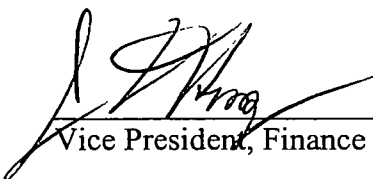
I hereby certify that:

1. I have read the audited financial statements and related IRS Form 990 of the United Way of Central Massachusetts for the year ended June 30, 2009.
2. Based on my knowledge, these financial statements do not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made, in light of the circumstances under which such statements were made, not misleading.
3. Based on my knowledge, the financial statements and other financial information included in this report, fairly present, in all material respects, the financial condition, results of operations and cash flows of the United Way of Central Massachusetts as of and for the period ended June 30, 2009.



President and Chief Executive Officer

Date Feb. 12, 2010



Vice President, Finance and Operations

Date Feb. 12, 2010



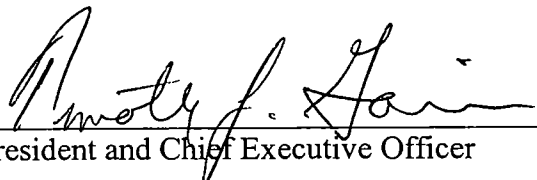
United Way of
Central Massachusetts

Sub-Certification of Financial Statements

CERTIFICATIONS

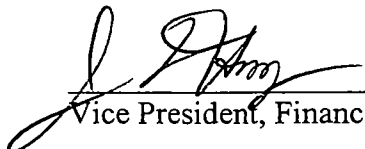
I hereby certify that:

1. I have read the audited financial statements and related IRS Form 990 of the United Way of Central Massachusetts for the year ended June 30, 2009.
2. I have disclosed to our organization's auditors all relevant controls and procedures established to assure the accuracy and integrity of information provided by my team;
3. I have reported to the Audit Committee any known or observed deficiencies in internal controls or fraud involving management;
4. Based on my knowledge, the portions of the financial statements that are based on information originating from my team do not contain any untrue statement of a material fact or omit to state a material fact necessary to ensure that the statements made, in light of the circumstances under which such statements were made, are not misleading;
5. Based on my knowledge, the financial statements and other financial information included in this report that pertain to information originating from my team, fairly present, in all material respects, the financial condition, results of operations and cash flows of the United Way of Central Massachusetts as of and for the period ended June 30, 2009.



President and Chief Executive Officer

Date Feb. 12, 2010



Vice President, Finance and Operations

Date FEB 12, 2010