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Form 990   Department of the Treasury Internal Revenue Service	<b>Return of Organization Exempt From Income Tax</b>  <b>Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)</b>  ▶ The organization may have to use a copy of this return to satisfy state reporting requirements	OMB No 1545-0047  <b>2010</b>  <b>Open to Public Inspection</b>
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<b>A For the 2010 calendar year, or tax year beginning 10-01-2010 and ending 09-30-2011</b>		
<b>B</b> Check if applicable <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C</b> Name of organization UNITED PLANNING ORGANIZATION  Doing Business As  Number and street (or P O box if mail is not delivered to street address) 301 RHODE ISLAND AVENUE NW <div>Room/suite</div> City or town, state or country, and ZIP + 4 WASHINGTON, DC 20001	<b>D Employer identification number</b>  52-0788987
	<b>F</b> Name and address of principal officer DANA M JONES 301 RHODE ISLAND AVENUE NW WASHINGTON,DC 20001	<b>E Telephone number</b>  (202) 238-4600
	<b>H(a)</b> Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	<b>H(b)</b> Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list (see instructions)	
	<b>H(c)</b> Group exemption number ▶	
<b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) ◀ (insert no ) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
<b>J Website:</b> ▶ WWW.UPO.ORG		
<b>K</b> Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>L</b> Year of formation 1962
<b>M</b> State of legal domicile DC		

<b>Part I</b>	<b>Summary</b>
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Activities & Governance	<b>1</b> Briefly describe the organization's mission or most significant activities PLAN, COORDINATE & IMPLEMENT HUMAN SERVICES    			
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets			
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) . . . . .	<b>3</b>	19	
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) . . . . .	<b>4</b>	19	
	<b>5</b> Total number of individuals employed in calendar year 2010 (Part V, line 2a) . . . . .	<b>5</b>	542	
	<b>6</b> Total number of volunteers (estimate if necessary) . . . . .	<b>6</b>	200	
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 . . . . .	<b>7a</b>	0	
	<b>b</b> Net unrelated business taxable income from Form 990-T, line 34 . . . . .	<b>7b</b>	0	
	Revenue	<b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .	<b>Prior Year</b>	<b>Current Year</b>
		<b>9</b> Program service revenue (Part VIII, line 2g) . . . . .	51,140,522	38,128,447
<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d ) . . . . .		295,567	600,382	
<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)		2,538	22,067	
<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .		111,105	114,011	
		51,549,732	38,864,907	
Expenses	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3 ) . . . . .	15,340,148	10,558,668	
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .	0	0	
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	22,407,498	18,859,095	
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .	0	0	
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ <sup>0</sup>			
	<b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f) . . . . .	13,939,969	9,646,309	
	<b>18</b> Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	51,687,615	39,064,072	
	<b>19</b> Revenue less expenses Subtract line 18 from line 12 . . . . .	-137,883	-199,165	
Net Assets or Fund Balances		<b>Beginning of Current Year</b>	<b>End of Year</b>	
	<b>20</b> Total assets (Part X, line 16) . . . . .	21,704,918	17,886,308	
	<b>21</b> Total liabilities (Part X, line 26) . . . . .	18,647,471	14,797,113	
	<b>22</b> Net assets or fund balances Subtract line 21 from line 20 . . . . .	3,057,447	3,089,195	

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

<b>Sign Here</b>	***** Signature of officer		2012-05-14 Date		
	DANA M JONES PRESIDENT & CHIEF EXECUTIVE OFICER Type or print name and title				
<b>Paid Preparer Use Only</b>	Print/Type preparer's name JULIA BUICK CPA	Preparer's signature JULIA BUICK CPA	Date	Check if self-employed <input type="checkbox"/>	PTIN
	Firm's name ▶ CLIFTONLARSONALLEN LLP				Firm's EIN ▶
	Firm's address ▶ 9515 DEERECO RD - SUITE 500 TIMONIUM, MD 210932184				Phone no ▶ (410) 453-0900

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

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III ☐ ☒

1 Briefly describe the organization's mission

UNITED PLANNING ORGANIZATION'S MISSION IS TO PLAN, COORDINATE & IMPLEMENT HUMAN SERVICES

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 \$ 11,343,165 including grants of \$ 2,186,050 ) (Revenue \$ )
COMMUNITY SERVICES - PROVIDES ASSISTANCE TO LOW INCOME, POVERTY LEVEL RESIDENTS OF DC TO ADVANCE SELF-SUFFICIENCY AND REDUCE ECONOMIC DEPENDENCY CSBG STIMULUS - PROGRAMS FUNDED THROUGH COMMUNITY SERVICES BLOCK GRANT TO PROVIDE ASSISTANCE TO LOW-INCOME, POVERTY LEVEL RESIDENTS OF THE DISTRICT OF COLUMBIA, WITH AN EMPHASIS ON EMPLOYMENT-RELATED SERVICES AND ACTIVITIES THAT CREATE AND SUSTAIN ECONOMIC GROWTH IN ACCORDANCE WITH THE AMERICAN RECOVERY AND REINVESTMENT ACT OF 2009	

4b	(Code ) (Expenses \$ 15,369,095 including grants of \$ 8,281,576 ) (Revenue \$ )
HEAD START AND EARLY HEAD START PROVIDES FAMILY DEVELOPMENT SERVICES AS WELL AS CHILD DEVELOPMENT AND SCHOOL READINESS SERVICES, HEALTH/MENTAL HEALTH SERVICES, NUTRITION SERVICES, AND DISABILITIES SERVICES TO CHILDREN AGES ZERO TO FIVE THE UNITED PLANNING ORGANIZATION IS REQUIRED TO PROVIDE SERVICES TO 1,374 CHILDREN AGES THREE TO FIVE AND THEIR FAMILIES, 308 INFANTS/TODDLERS AND THEIR FAMILIES, AND PREGNANT WOMEN HEADSTART STIMULUS - FUNDING AWARDED BY DEPARTMENT OF HEALTH AND HUMAN SERVICES UNDER THE AMERICAN RECOVERY AND REINVESTMENT ACT OF 2009 FOR COST OF LIVING ADJUSTMENT (COLA) TO HEAD START AND EARLY HEAD START EMPLOYEES AND FOR QUALITY IMPROVEMENT, AND ADDITIONAL FUNDING FOR HEAD START PROGRAM CONTINUED HEADSTART EXPANSION, AND EARLY LEARNING MENTOR COACH PROGRAM	
















4c	(Code ) (Expenses \$ 4,408,754 including grants of \$ ) (Revenue \$ )
SPECIAL EMPHASIS PROGRAMS THE TEMPORARY ASSISTANCE FOR NEEDY FAMILIES PROGRAM (TANF)- IS A COMPREHENSIVE PROGRAM THAT ASSISTS INDIVIDUALS WHO RECEIVE PUBLIC ASSISTANCE TO MOVE TOWARD INDEPENDENCE BY PROVIDING CASE MANAGEMENT, JOB REFERRALS, WORK ASSISTANCE, EDUCATIONAL REFERRALS, AND OTHER TRANSITION TOOLSPASSPORT/IN-SCHOOL -A DROPOUT PREVENTION PROGRAM PROVIDING SUPPORT TO YOUTH AGES 14 TO 19 AND THEIR FAMILIES THE ACTIVITY ASSISTS IN THE EXPLORATION OF FUTURE CAREERS AND GOALS WITH THE ULTIMATE MISSION OF PREPARING YOUTH FOR POST-SECONDARY EDUCATION SPECIAL EMPHASIS PROGRAMS CONTINUED FOSTER GRANDPARENTS PROGRAM IS A VOLUNTEER SERVICE PROGRAM FOR PERSONS 60 YEARS OF AGE AND OLDER HUNDREDS OF PROGRAM VOLUNTEERS SERVE IN MORE THAN 35 EDUCATIONAL SETTINGS IN THE DISTRICT OF COLUMBIA VOLUNTEERS WORK ONE-TO-ONE AND IN SMALL GROUPS WITH SPECIAL NEEDS CHILDREN FROM BIRTH TO 21 YEARS THE COMPREHENSIVE TREATMENT CENTER (CTC) IS AN OUTPATIENT OPIOID TREATMENT PROGRAM THAT PROVIDES MEDICALLY ORIENTED TREATMENT TO OPIATE DEPENDENT PERSONS SIX DAYS A WEEK MEDICALLY ORIENTED TREATMENT INCLUDES ASSESSMENT AND TREATMENT PLANNING, MEDICATION MANAGEMENT, COUNSELING, MENTAL HEALTH THERAPY, CASE MANAGEMENT, AND LIFE SKILLS SERVICES CTC PROVIDES MEDICATION MANAGEMENT SERVICES TO 768 - 889 PATIENTS	

4d	Other program services (Describe in Schedule O ) <b>See also Additional Data for Description</b>
	(Expenses \$ 7,559,654 including grants of \$ 91,042 ) (Revenue \$ 654,896 )

4e	<b>Total program service expenses</b> \$ 38,680,668
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Part IV

Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> 	1	Yes
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instruction)? 	2	Yes
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i> . . . . .	3	No
4	<b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i> . . . . .	4	No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i> . . . . .	5	
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> 	6	No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? <i>If "Yes," complete Schedule D, Part II.</i> 	7	No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> 	8	No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> 	9	Yes
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V.</i> 	10	No
11	If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i> 	11a	Yes
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i> 	11b	No
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i> 	11c	No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i> 	11d	No
e	Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i> 	11e	Yes
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i> 	11f	Yes
12a	Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII.</i> 	12a	Yes
b	Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional.</i> 	12b	No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i>	13	No
14a	Did the organization maintain an office, employees, or agents outside of the United States? . . . . .	14a	No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? <i>If "Yes," complete Schedule F, Parts I and IV.</i> . . . . .	14b	No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S ? <i>If "Yes," complete Schedule F, Parts II and IV.</i> . . . . .	15	No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S ? <i>If "Yes," complete Schedule F, Parts III and IV.</i> . . . . .	16	No
17	Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions)</i>	17	No
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i> . . . . .	18	Yes
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i> . . . . .	19	No
20a	Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H.</i> . . . . .	20a	No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? <b>Note.</b> Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions)	20b	

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i> . . . . .	21	Yes	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> . . . . .	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> . . . . .	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b–24d and complete Schedule K. If "No," go to line 25</i> . . . . .	24a	Yes	
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . .	24b		No
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .	24c		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . .	24d		No
25a	<b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> . . . . .	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i> . . . . .	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i> . . . . .	27		No
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i> . . . . .	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> . . . . .	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> . . . . .	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .	32		No
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? <i>If "Yes," complete Schedule R, Part I</i> . . . . .	33		No
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i> . . . . .	34	Yes	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? . . . . .	35	Yes	
a	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .			<div><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</div>
36	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .	36		No
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? <i>If "Yes," complete Schedule R, Part VI</i> . . . . .	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .	38	Yes	

<b>Part V</b> <b>Statements Regarding Other IRS Filings and Tax Compliance</b>			
Check if Schedule O contains a response to any question in this Part V <input type="checkbox"/>			
		<b>Yes</b>	<b>No</b>
<b>1a</b>	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.	<b>1a</b>	118
<b>b</b>	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	<b>1b</b>	0
<b>c</b>	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	<b>1c</b>	
<b>2a</b>	Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return.	<b>2a</b>	542
<b>b</b>	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?  <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	<b>2b</b>	Yes
<b>3a</b>	Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>	No
<b>b</b>	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.	<b>3b</b>	
<b>4a</b>	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>	No
<b>b</b>	If "Yes," enter the name of the foreign country: _____ See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
<b>5a</b>	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>	No
<b>b</b>	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>	No
<b>c</b>	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>	
<b>6a</b>	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	<b>6a</b>	No
<b>b</b>	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>	
<b>7</b>	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
<b>a</b>	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>	Yes
<b>b</b>	If "Yes," did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>	Yes
<b>c</b>	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>	No
<b>d</b>	If "Yes," indicate the number of Forms 8282 filed during the year.	<b>7d</b>	
<b>e</b>	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>	No
<b>f</b>	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>	No
<b>g</b>	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>	
<b>h</b>	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>	
<b>8</b>	<b>Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations.</b> Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	<b>8</b>	
<b>9</b>	<b>Sponsoring organizations maintaining donor advised funds.</b>		
<b>a</b>	Did the organization make any taxable distributions under section 4966?	<b>9a</b>	
<b>b</b>	Did the organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>	
<b>10</b>	<b>Section 501(c)(7) organizations.</b> Enter		
<b>a</b>	Initiation fees and capital contributions included on Part VIII, line 12.	<b>10a</b>	
<b>b</b>	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	<b>10b</b>	
<b>11</b>	<b>Section 501(c)(12) organizations.</b> Enter		
<b>a</b>	Gross income from members or shareholders.	<b>11a</b>	
<b>b</b>	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).	<b>11b</b>	
<b>12a</b>	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>	
<b>b</b>	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	<b>12b</b>	
<b>13</b>	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
<b>a</b>	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.	<b>13a</b>	
<b>b</b>	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.	<b>13b</b>	
<b>c</b>	Enter the amount of reserves on hand.	<b>13c</b>	
<b>14a</b>	Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>	No
<b>b</b>	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.	<b>14b</b>	

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.  
Check if Schedule O contains a response to any question in this Part VI

Section A. Governing Body and Management			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	1a19		
b	Enter the number of voting members included in line 1a, above, who are independent	1b19		
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		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	Yes	
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6	Does the organization have members or stockholders?	6		No
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a	Yes	
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following			
a	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)			Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	10a		No
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?	10b		
11a	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990			
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
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	Yes	
13	Does the organization have a written whistleblower policy?	13	Yes	
14	Does the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line 15a or 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		No
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▶DC
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply. <input checked="" type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization ▶ MESERET DEGEFU 301 RHODE ISLAND AVENUE NW WASHINGTON, DC 20001 (202) 238-4600

Part VII

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

Check if Schedule O contains a response to any question in this Part VII

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

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

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

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

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

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(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			
(1) DIANE L HARTLEY DIRECTOR	4 00	X						0	0	0
(2) MONIQUE L POYDRAS JD DIRECTOR	4 00	X						0	0	0
(3) KAREN M BERNOLA DIRECTOR	4 00	X						0	0	0
(4) JOHN L OBERDORFER ESQ VICE CHAIR, DIRECTOR	4 00	X		X				0	0	0
(5) ALEXANDER M PADRO DIRECTOR	4 00	X						0	0	0
(6) LENDIA JOHNSON DIRECTOR	4 00	X						0	0	0
(7) LOIS E TIBBS DIRECTOR	4 00	X						0	0	0
(8) COURTNEY P DAVIS PH D DIRECTOR	4 00	X						0	0	0
(9) KISHIA MILLS DIRECTOR	4 00	X						0	0	0
(10) KEENAN R KELLER ESQ CHAIR, DIRECTOR	4 00	X		X				0	0	0
(11) MARIA T WILSON MED SECRETARY, DIRECTOR	4 00	X		X				0	0	0
(12) ELAINE A CRIDER DHSC TREASURER, DIRECTOR	4 00	X		X				0	0	0
(13) DONTAI L SMALLS DIRECTOR	4 00	X						0	0	0
(14) FRANKLIN GARCIA DIRECTOR	4 00	X						0	0	0
(15) FREDDIE T VAUGHNS DSW DIRECTOR	4 00	X						0	0	0
(16) MICHAEL J COBB CPA MBA DIRECTOR	4 00	X						0	0	0



Part VII

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

(A) Name and Title	(B) Average hours per week (describe hours for related organizations in Schedule O)	(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			
(17) RONALD R COLLINS ESQ DIRECTOR	4 00	X						0	0	0
(18) CLIFFORD E BARNES ESQ DIRECTOR	4 00	X						0	0	0
(19) TERENCE INGRAM DIRECTOR	4 00	X						0	0	0
(20) DANA M JONES PRESIDENT & CEO	37 50			X				168,237	0	9,253
(21) MESERET DEGEFU VP OF FINANCE & CFO	37 50			X				115,942	0	6,377
(22) MONICA SCOTT BECKHAM VP LEGAL AFFAIRS & GENERAL COUNSEL	37 50					X		110,296	0	6,066
(23) SHEWARK AKEBEREGN DIRECTOR OF ACCOUNTING	37 50					X		105,000	0	5,775
(24) WENDELL R SMITH DIRECTOR OF FINANCIAL OPERATIONS	37 50					X		105,000	0	5,775
(25) ANDREA D THOMAS VP OF ADMINISTRATION & CHIEF OF STAFF	37 50					X		107,200	0	5,896
1b Sub-Total										
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)								711,675	0	39,142

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization6

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
HARD LIGHT CONSULTING GROUP 2119 FIRST STREET NW WASHINGTON, DC 20001	CONSTRUCTION	727,136
GOOD FOOD COMPANY 1523 N DANVILLE STREET ARLINGTON, VA 22201	CATERING	509,297
J & E ASSOCIATES 8757 GEORGIA AVENUE SUITE 400 SILVER SPRING, MD 20910	NURSING SERVICES	414,610
EDWIN CHAPMAN 1647 BENNING ROAD NE UNIT 200 WASHINGTON, DC 20002	MEDICAL SERVICES	405,600
CAPITAL CONSTRUCTION GROUP 3321 12TH STREET NW WASHINGTON, DC 20001	CONSTRUCTION	219,683
2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization 9		

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				
	b	Membership dues . . . . .	1b				
	c	Fundraising events . . . . .	1c	39,444			
	d	Related organizations . . . . .	1d				
	e	Government grants (contributions)	1e	37,391,571			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	697,432			
	g	Noncash contributions included in lines 1a-1f \$		473			
	h	Total. Add lines 1a-1f . . . . .		38,128,447			
	Program Service Revenue			Business Code			
2a		DAYCARE FEES	624410	310,694	310,694		
b		WEATHERIZATION CONTRAC	900099	205,562	205,562		
c		OTHER PROGRAM SERVICE	900099	84,126	84,126		
d							
e							
f		All other program service revenue					
g		Total. Add lines 2a-2f . . . . .		600,382			
Other Revenue		3	Investment income (including dividends, interest and other similar amounts) . . . . .				
				1,106		1,106	
	4	Income from investment of tax-exempt bond proceeds . . .					
	5	Royalties . . . . .					
	6a	(i) Real		(ii) Personal			80,458
		80,458					
		80,458					
		Net rental income or (loss) . . . . .		80,458			
	7a	(i) Securities		(ii) Other			20,961
				20,961			
				20,961			
		Net gain or (loss) . . . . .		20,961			
	8a	Gross income from fundraising events (not including \$ 39,444 of contributions reported on line 1c) See Part IV, line 18 . . . . .					0
		a		74,707			
		b Less direct expenses . . . . . b		74,707			
	c	Net income or (loss) from fundraising events . . .					
	9a	Gross income from gaming activities See Part IV, line 19 . . . a					
		b Less direct expenses . . . . . b					
		c Net income or (loss) from gaming activities . . .					
	10a	Gross sales of inventory, less returns and allowances . . . . .					
a							
b Less cost of goods sold . . . . . b							
c	Net income or (loss) from sales of inventory . . .						
Miscellaneous Revenue		Business Code					
11a	INSURANCE PROCEEDS		900099	33,553	33,553		
b							
c							
d	All other revenue . . . . .						
e	Total. Add lines 11a-11d . . . . .			33,553			
12	Total revenue. See Instructions . . . . .			38,864,907	654,896	0	
					0	81,564	

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	10,467,626	10,467,626		
2	Grants and other assistance to individuals in the U S See Part IV, line 22	91,042	91,042		
3	Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees . . . . .	302,460		302,460	
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .				
7	Other salaries and wages	15,245,749	12,092,019	3,153,730	
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions) . . . . .	841,452	666,700	174,752	
9	Other employee benefits . . . . .	2,469,434	1,920,594	548,840	
10	Payroll taxes . . . . .				
a	Fees for services (non-employees)				
	Management . . . . .				
b	Legal . . . . .				
c	Accounting . . . . .				
d	Lobbying . . . . .				
e	Professional fundraising services See Part IV, line 17 . . . . .				
f	Investment management fees . . . . .				
g	Other . . . . .				
12	Advertising and promotion . . . . .				
13	Office expenses . . . . .				
14	Information technology . . . . .				
15	Royalties . . . . .				
16	Occupancy . . . . .	2,310,565	2,349,182	-38,617	
17	Travel . . . . .	476,695	444,253	32,442	
18	Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .				
19	Conferences, conventions, and meetings . . . . .				
20	Interest . . . . .	410,679	376,350	34,329	
21	Payments to affiliates . . . . .				
22	Depreciation, depletion, and amortization . . . . .				
23	Insurance . . . . .				
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24f If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O )				
a	PURCHASE OF SERVICES	3,143,305	2,964,922	178,383	
b	CLIENT RELATED COSTS	1,172,377	1,172,377		
c	EQUIPMENT RENTAL AND MA	849,469	833,407	16,062	
d	SUPPLIES AND CONSTRUCTI	601,879	504,609	97,270	
e	UNALLOCATED DEPRECIATIO	530,390	391,439	138,951	
f	All other expenses	150,950	4,406,148	-4,255,198	
25	Total functional expenses. Add lines 1 through 24f	39,064,072	38,680,668	383,404	0
26	Joint costs. Check here <input checked="" type="checkbox"/> if following SOP 98-2 (ASC 958-720) Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X

Balance Sheet

					(A)		(B)
					Beginning of year		End of year
Assets	1	Cash—non-interest-bearing . . . . .			2,269,891	1	835,696
	2	Savings and temporary cash investments . . . . .			90,592	2	91,182
	3	Pledges and grants receivable, net . . . . .			5,566,054	3	4,088,231
	4	Accounts receivable, net . . . . .				4	
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L . . . . .				5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers, and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Schedule L . . . . .				6	
	7	Notes and loans receivable, net . . . . .				7	
	8	Inventories for sale or use . . . . .				8	
	9	Prepaid expenses and deferred charges . . . . .			295,061	9	272,934
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	10a	18,774,780			
	b	Less: accumulated depreciation . . . . .	10b	6,342,892	12,953,293	10c	12,431,888
	11	Investments—publicly traded securities . . . . .				11	
	12	Investments—other securities. See Part IV, line 11 . . . . .				12	
	13	Investments—program-related. See Part IV, line 11 . . . . .				13	
	14	Intangible assets . . . . .				14	
	15	Other assets. See Part IV, line 11 . . . . .			530,027	15	166,377
16	Total assets. Add lines 1 through 15 (must equal line 34) . . . . .			21,704,918	16	17,886,308	
Liabilities	17	Accounts payable and accrued expenses . . . . .			3,911,193	17	2,518,015
	18	Grants payable . . . . .				18	
	19	Deferred revenue . . . . .			1,850,288	19	517,137
	20	Tax-exempt bond liabilities . . . . .			10,265,758	20	9,789,289
	21	Escrow or custodial account liability. Complete Part IV of Schedule D . . . . .				21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L . . . . .				22	
	23	Secured mortgages and notes payable to unrelated third parties . . . . .				23	
	24	Unsecured notes and loans payable to unrelated third parties . . . . .				24	
	25	Other liabilities. Complete Part X of Schedule D . . . . .			2,620,232	25	1,972,672
	26	Total liabilities. Add lines 17 through 25 . . . . .			18,647,471	26	14,797,113
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets . . . . .			916,748	27	841,752
	28	Temporarily restricted net assets . . . . .			2,140,699	28	2,247,443
	29	Permanently restricted net assets . . . . .				29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> 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 . . . . .			3,057,447	33	3,089,195
34	Total liabilities and net assets/fund balances . . . . .			21,704,918	34	17,886,308	

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI . . . . .

1	Total revenue (must equal Part VIII, column (A), line 12)	1	38,864,907
2	Total expenses (must equal Part IX, column (A), line 25)	2	39,064,072
3	Revenue less expenses Subtract line 2 from line 1	3	-199,165
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	3,057,447
5	Other changes in net assets or fund balances (explain in Schedule O)	5	230,913
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	3,089,195

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII . . . . .

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

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury  
Internal Revenue Service

Public Charity Status and Public Support

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

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2010

Open to Public  
Inspection

Name of the organization UNITED PLANNING ORGANIZATION	Employer identification number 52-0788987
--	--

Part I

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

The organization is not a private foundation because it is (For lines 1 through 11, check only one box )

- 1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E )
- 3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state
- 5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II )
- 6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II )
- 8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II )
- 9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III )
- 10

☐

An organization organized and operated exclusively to test for public safety See**section 509(a)(4).**
- 11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h  

a

☐

Type I

b

☐

Type II

c

☐

Type III - Functionally integrated

d

☐

Type III - Other
- e

☐

By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)
- f

☐

If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box
- g

☐

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?  

(i)

a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?

(ii)

a family member of a person described in (i) above?

(iii)

a 35% controlled entity of a person described in (i) or (ii) above?
- h

☐

Provide the following information about the supported organization(s)

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

(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 or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	38,167,201	40,038,695	41,263,993	51,140,522	38,128,447	208,738,858
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	38,167,201	40,038,695	41,263,993	51,140,522	38,128,447	208,738,858
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)						
6 Public Support. Subtract line 5 from line 4						208,738,858

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
7 Amounts from line 4	38,167,201	40,038,695	41,263,993	51,140,522	38,128,447	208,738,858
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	8,763	51,073	104,957	109,498	81,564	355,855
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.)	164,207	135,581	18,863	4,145	33,553	356,349
11 Total support (Add lines 7 through 10)						209,451,062
12 Gross receipts from related activities, etc. (See instructions.)					12	1,476,896
13 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here ▶						

Section C. Computation of Public Support Percentage		
14 Public Support Percentage for 2010 (line 6 column (f) divided by line 11 column (f))	14	99.660 %
15 Public Support Percentage for 2009 Schedule A, Part II, line 14	15	99.610 %
16a 33 1/3% support test—2010. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶		
b 33 1/3% support test—2009. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶		
17a 10%-facts-and-circumstances test—2010. 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—2009. 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 IIIPart III

Support Schedule for Organizations Described in Section 509(a)(2)  
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) 	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public Support (Subtract line 7c from line 6 )						

Section B. Total Support						
Calendar year (or fiscal year beginning in) 	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(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 section501(c)(3) organization, check this box and <b>stop here</b> 						

Section C. Computation of Public Support Percentage		
15 Public Support Percentage for 2010 (line 8 column (f) divided by line 13 column (f))	15	
16 Public support percentage from 2009 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2010 (line 10c column (f) divided by line 13 column (f))	17	
18 Investment income percentage from 2009 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2010. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization 		
b 33 1/3% support tests—2009. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and <b>stop here</b> . 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.** Supplemental Information. Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

Explanation	
SCHEDULE A, PART IV, SUPPLEMENTAL INFORMATION	SCHEDULE A, PART II, SECTION B, LINE 10, OTHER INCOME    INSURANCE PROCEEDS



Additional Data

Software ID:  
Software Version:  
EIN: 52-0788987  
Name: UNITED PLANNING ORGANIZATION

Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)

4d. Other program services			
(Code )	(Expenses \$ 1,943,936	including grants of \$ )	(Revenue \$ 1,146 )
HOMELESS PROGRAM (SHELTER HOTLINE)- THE SHELTER HOTLINE PROGRAM IS AN INTEGRAL PART OF THE CONTINUUM OF CARE FOR THE HOMELESS IN THE DISTRICT OF COLUMBIA, RENDERING YEAR-ROUND TRANSPORTATION, OUTREACH, AND INFORMATION AND REFERRAL SERVICES, UNDER A CONTRACT WITH THE COMMUNITY PARTNERSHIP FOR THE PREVENTION OF HOMELESSNESS IT OPERATES SEVEN DAYS A WEEK, TWENTY-FOUR HOURS A DAY, DURING HYPOTHERMIA SEASON FROM NOVEMBER 1 TO MARCH 31, PROVIDING TRANSPORTATION TO SHELTERS, WARM CLOTHING, BLANKETS, SLEEPING BAGS, AS WELL AS HOT DRINKS, AND FOOD ITEMS WHEN AVAILABLE, TO THE HOMELESS TO HELP PREVENT DEATHS FROM FREEZING DURING HYPERTHERMIA SEASON FROM APRIL 1 TO OCTOBER 31, THE HOTLINE PROVIDES TRANSPORTATION TO SHELTERS AND COOLING STATIONS, AND PROVIDES WATER, COLD DRINKS, AND CLOTHING APPAREL TO THE HOMELESS IN ORDER TO PREVENT DEHYDRATION, HEAT STROKE, AND THE ONSET OF HYPERTHERMIA			
(Code )	(Expenses \$ 79,167	including grants of \$ )	(Revenue \$ )
SHELTER PLUS CARE - THE SHELTER PLUS CARE PROGRAM IS AN INTEGRAL PART OF THE CONTINUUM OF CARE FOR THE HOMELESS IN THE DISTRICT OF COLUMBIA, OPERATING UNDER A CONTRACT WITH THE COMMUNITY PARTNERSHIP FOR THE PREVENTION OF HOMELESSNESS THE PROGRAM PROVIDES CASE MANAGEMENT AND SUPPORTIVE SERVICES FIVE DAYS A WEEK TO SIXTEEN HOMELESS FAMILIES RECOVERING FROM SUBSTANCE ABUSE AND WHO MAY ALSO HAVE A DIAGNOIS OF HIV/AIDS AND ARE RECEIVING RENTAL ASSISTANCE FOR PERMANENT HOUSING FROM THE PARTNERSHIP CASE MANAGEMENT AND SUPPORTIVE SERVICES INCLUDE PROVIDING TO OR REFERRING FAMILIES FOR HEALTH AND MENTAL HEALTH SERVICES, SUBSTANCE ABUSE RECOVERY SERVICES, AND LIFE SKILLS TRAINING			
(Code )	(Expenses \$ 2,138,713	including grants of \$ )	(Revenue \$ 205,562 )
WEATHERIZATION - IMPLEMENT WEATHERIZATION ACTIVITIES AND PROVIDE FOR THE PURCHASE AND INSTALLATION OF ENERGY EFFICIENCY MEASURES IN LOWINCOME RESIDENCES AND ENERGY AUDITS UNDER THE RESIDENTIAL CONSERVATION ASSISTANCE SERVICES THE DC REACH (BE-WELL-BE-WARM) PROGRAM IS AN OUTREACH EFFORT TO INCREASE THE EFFECTIVENESS OF ENERGY ASSISTANCE BY REACHING OUT TO LOWINCOME FAMILIES IN FRAIL HEALTH POWER- PROVIDING OPPORTUNITIES WITH EDUCATIONAL READINESS (POWER) IS A FIVE YEAR INITIATIVE INITIALLY DEVELOPED IN PARTNERSHIP WITH THE UNITED PLANNING ORGANIZATION AND AMERICAN UNIVERSITY ENROLLED STUDENTS ARE TRACKED FROM 7TH GRADE THROUGH 12TH GRADE THE MISSION IS TO ENCOURAGE AND MOTIVATE STUDENTS LIVING IN CONGRESS HEIGHTS TO PURSUE A COLLEGE OR POST-SECONDARY EDUCATION AND TO OFFER ACADEMIC, CULTURAL AND SOCIAL ENRICHMENT AS YOUTH MATRICULATE FROM MIDDLE SCHOOL THROUGH HIGH SCHOOL THE PROGRAM IS FUNDED BY A GRANT FROM THE OFFICE OF JUSTICE GRANTS ADMINISTRATION UNDER THE AMERICAN RECOVERY AND REINVESTMENT ACT CAPITAL HEALTH CAREERS PROGRAM ADDRESSES DUAL NEEDS IN THE DISTRICT OF COLUMBIA BY ALLEVIATING UNEMPLOYMENT AND FILLING HEALTHCARE WORKFORCE DEFICITS THIS PROGRAM IS FUNDED BY A GRANT FROM THE US DEPARTMENT OF LABOR, EMPLOYMENT AND TRAINING ADMINISTRATION UNDER THE AMERICAN RECOVERY AND REINVESTMENT ACT			
(Code )	(Expenses \$ 2,656,543	including grants of \$ )	(Revenue \$ 310,694 )
PRESCHOOL AND DAYCARE - OTHER CHILD CARE SERVICES ARE PROVIDED TO 109 ADDITIONAL CHILDERN AGES 2 TO 5 YEARS AND 28 INFANTS			
(Code )	(Expenses \$ 741,295	including grants of \$ 91,042 )	(Revenue \$ 137,494 )
PRIVATE AND GENERAL PROGRAM SERVICES - INCLUDES ACTIVITIES OF THE MARTIN LUTHER KING JR MEMORIAL BREAKFAST AND THE ELECTRONIC BENEFIT TRANSFER PROGRAM (EBT) UPO SPONSORS THE UPO/JOSEPH A BEAVERS SCHOLARSHIP PROGRAM THAT AWARDS SCHOLARSHIPS TO DESERVING DISTRICT OF COLUMBIA HIGH SCHOOL AND G E D GRADUATES NAMED FOR JOSEPH A BEAVERS, THE LATE LABOR LEADER AND FORMER MEMBER OF UPO'S GOVERNING BOARD, THE SCHOLARSHIP PROGRAM IS MADE POSSIBLE WITH PROCEEDS RECEIVED FROM THE AGENCY'S ANNUAL MARTIN LUTHER KING JR MEMORIAL BREAKFAST THAT IS HELD IN JANUARY OF EVERY YEAR THE EBT PROGRAM PROVIDES NEW AND REPLACEMENT EBT CARDS FOR ALL ELIGIBLE DHS FOOD STAMP AND TANF RECIPIENTS THE CARDS ARE DESIGNED TO PROVIDE A SAFE, CONVENIENT AND EASY WAY FOR PERSONS WHO RECEIVE CASH BENEFITS AND FOOD STAMPS TO GET CASH OR PAY FOR PURCHASES AT PARTICIPATING STORES AND MAKE WITHDRAWALS FROM ATMS			

SCHEDULE D

(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.**  
▶ **Attach to Form 990. ▶ See separate instructions.**

OMB No 1545-0047

2010

Open to Public  
Inspection

Name of the organization  
UNITED PLANNING ORGANIZATION

Employer identification number  
52-0788987

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?	
	<div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>	
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 for any other purpose conferring impermissible private benefit	
	<div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>	

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)											
	<div><input type="checkbox"/> Preservation of land for public use (e g , recreation or pleasure)</div> <div><input type="checkbox"/> Protection of natural habitat</div> <div><input type="checkbox"/> Preservation of open space</div>	<div><input type="checkbox"/> Preservation of an historically importantly land area</div> <div><input type="checkbox"/> Preservation of a certified historic structure</div>										
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											
		<table><tr><td></td><td>Held at the End of the Year</td></tr><tr><td>a</td><td>Total number of conservation easements</td></tr><tr><td>b</td><td>Total acreage restricted by conservation easements</td></tr><tr><td>c</td><td>Number of conservation easements on a certified historic structure included in (a)</td></tr><tr><td>d</td><td>Number of conservation easements included in (c) acquired after 8/17/06</td></tr></table>		Held at the End of the Year	a	Total number of conservation easements	b	Total acreage restricted by conservation easements	c	Number of conservation easements on a certified historic structure included in (a)	d	Number of conservation easements included in (c) acquired after 8/17/06
	Held at the End of the Year											
a	Total number of conservation easements											
b	Total acreage restricted by conservation easements											
c	Number of conservation easements on a certified historic structure included in (a)											
d	Number of conservation easements included in (c) acquired after 8/17/06											
3	Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____											
4	Number of states where property subject to conservation easement is located ▶ _____											
5	Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?											
	<div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>											
6	Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶ _____											
7	Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$ _____											
8	Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?											
	<div><input type="checkbox"/> Yes</div> <div><input type="checkbox"/> No</div>											
9	In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements											

Part III

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

1a	If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items	
b	If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items	
	(i) Revenues included in Form 990, Part VIII, line 1	▶ \$ _____
	(ii) Assets included in Form 990, Part X	▶ \$ _____
2	If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items	
a	Revenues included in Form 990, Part VIII, line 1	▶ \$ _____
b	Assets included in Form 990, Part X	▶ \$ _____

Part III

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

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

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

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

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☒ No

b

If "Yes," explain the arrangement in Part XIV and complete the following table

	Amount
1c	0
1d	0
1e	0
1f	0

2a

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

☐ Yes

☒ No

b

If "Yes," explain the arrangement in Part XIV

Part V

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

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a	Beginning of year balance . . . . .				
b	Contributions . . . . .				
c	Investment earnings or losses . . . . .				
d	Grants or scholarships . . . . .				
e	Other expenditures for facilities and programs . . . . .				
f	Administrative expenses . . . . .				
g	End of year balance . . . . .				

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶

b

Permanent endowment ▶

c

Term endowment ▶

3a

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

(i) unrelated organizations . . . . .

3a(i)

Yes

No

(ii) related organizations . . . . .

3a(ii)

Yes

No

b

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

3b

Yes

No

4

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

Part VI

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

Description of investment	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land . . . . .		1,578,661		1,578,661
b Buildings . . . . .		15,179,554	5,023,860	10,155,694
c Leasehold improvements . . . . .		426,158	426,158	0
d Equipment . . . . .		1,223,629	803,317	420,312
e Other . . . . .		366,778	89,557	277,221
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) . . . . . ▶				12,431,888

Schedule D (Form 990) 2010



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	38,864,907
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	39,064,072
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	-199,165
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	230,913
9	Total adjustments (net) Add lines 4 - 8	9	230,913
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	31,748

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	38,939,614
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments . . . . .	2a	
b	Donated services and use of facilities . . . . .	2b	
c	Recoveries of prior year grants . . . . .	2c	
d	Other (Describe in Part XIV) . . . . .	2d	74,707
e	Add lines 2a through 2d . . . . .	2e	74,707
3	Subtract line 2e from line 1 . . . . .	3	38,864,907
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	
b	Other (Describe in Part XIV) . . . . .	4b	
c	Add lines 4a and 4b . . . . .	4c	0
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12 ) . . . . .	5	38,864,907

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements . . . . .	1	39,138,779
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities . . . . .	2a	
b	Prior year adjustments . . . . .	2b	
c	Other losses . . . . .	2c	
d	Other (Describe in Part XIV) . . . . .	2d	74,707
e	Add lines 2a through 2d . . . . .	2e	74,707
3	Subtract line 2e from line 1 . . . . .	3	39,064,072
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	
b	Other (Describe in Part XIV) . . . . .	4b	
c	Add lines 4a and 4b . . . . .	4c	0
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18 ) . . . . .	5	39,064,072

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. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
PART XI, LINE 8 - OTHER ADJUSTMENTS		CAPITALIZATION OF PROGRAM EXPENSES 230,913
PART XII, LINE 2D - OTHER ADJUSTMENTS		SPECIAL EVENT EXPENSES 74,707
PART XIII, LINE 2D - OTHER ADJUSTMENTS		SPECIAL EVENTS EXPENSES 74,707
		PART X, LINE 2 IN JUNE 2006, THE FASB ISSUED INTERPRETATION NO 48, ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES (FASB ASC 740-10), TO CREATE A SINGLE MODEL TO ADDRESS ACCOUNTING FOR UNCERTAINTY IN TAX POSITIONS. THIS INTERPRETATION CLARIFIES THE ACCOUNTING FOR INCOME TAXES BY PRESCRIBING A MINIMUM RECOGNITION THRESHOLD. A TAX POSITION IS REQUIRED TO MEET BEFORE BEING RECOGNIZED IN THE FINANCIAL STATEMENTS. THIS INTERPRETATION ALSO PROVIDES GUIDANCE ON DERECOGNITION, MEASUREMENT, CLASSIFICATION, INTEREST AND PENALTIES, DISCLOSURE AND TRANSITION. THIS INTERPRETATION WAS EFFECTIVE FOR FISCAL YEARS BEGINNING AFTER DECEMBER 15, 2006, BUT THE EFFECTIVE DATE WAS DEFERRED TO FISCAL YEARS BEGINNING AFTER DECEMBER 15, 2008, FOR CERTAIN NONPUBLIC ENTERPRISES BY FASB STAFF POSITION, FOR THE EFFECTIVE DATE OF FASB INTERPRETATION FOR ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES FOR CERTAIN NONPUBLIC ENTERPRISES. THERE IS NO SIGNIFICANT IMPACT ON THE FINANCIAL POSITION AND RESULTS OF OPERATIONS AS A RESULT OF UPO'S ADOPTION OF THIS INTERPRETATION IN THE CURRENT YEAR.

## Supplemental Information Regarding Fundraising or Gaming Activities

Department of the Treasury  
Internal Revenue Service

**Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.**  
**▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No 1545-0047

# 2010

## Open to Public Inspection

Name of the organization  
UNITED PLANNING ORGANIZATION

**Employer identification number**  
52-0788987

**Part I Fundraising Activities.** Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

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

- a** ☐ Mail solicitations
- b** ☐ Internet and e-mail 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 and address 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			
Total . . . . . ▶						

**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

[illegible]



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
		MLK JR. BREAKFAST (event type)	(event type)	(total number)	(Add col (a) through col (c))
Revenue	1	Gross receipts . . . .	114,151		114,151
	2	Less Charitable contributions . . . .	39,444		39,444
	3	Gross income (line 1 minus line 2) . . . .	74,707		74,707
Direct Expenses	4	Cash prizes . . . .			
	5	Non-cash prizes . . . .			
	6	Rent/facility costs . . . .			
	7	Food and beverages . . . .	23,045		23,045
	8	Entertainment . . . .			
	9	Other direct expenses . . . .	51,662		51,662
	10	Direct expense summary Add lines 4 through 9 in column (d) . . . . . ▶			
	11	Net income summary Combine lines 3 and 10 in column (d). . . . . ▶			
					0

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 . . . . .	<input type="checkbox"/> Yes _____% <input type="checkbox"/> No	<input type="checkbox"/> Yes _____% <input type="checkbox"/> No	<input type="checkbox"/> Yes _____% <input type="checkbox"/> 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) . . . . . ▶			

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? . . . . . ☐ Yes ☐ No

b If "No," Explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? . . . . . ☐ Yes ☐ No

b If "Yes," Explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11

Does the organization operate gaming activities with nonmembers?

☐ Yes ☐ No

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?

☐ 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?

☐ Yes ☐ No

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?

☐ Yes ☐ No

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 ▶ \$ \_\_\_\_\_

Part IV Complete this part to provide additional information for responses to question on Schedule G (see instructions.)

Identifier	ReturnReference	Explanation
------------	-----------------	-------------

Schedule I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
UNITED PLANNING ORGANIZATION

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

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

OMB No 1545-0047

2010

Open to Public  
Inspection

Employer identification number  
52-0788987

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" to 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. Part II can be duplicated if additional space is needed. . . . . ▶ ☐

1 (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
See Additional Data Table							

2

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

26

3

Enter total number of other organizations . . . . . ▶

**Part III**

**Grants and Other Assistance to Individuals in the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22.  
Use Schedule I-1 (Form 990) if additional space is needed.

(a)Type of grant or assistance	(b)Number of recipients	(c)Amount of cash grant	(d)Amount of non-cash assistance	(e)Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance
(1) EDUCATIONAL ASSISTANCE	5	83,499	7,543	FMV	COMPUTERS AND BOOKS FOR GRANT RECIPIENTS

**Part IV**

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

Identifier	Return Reference	Explanation
PROCEDURE FOR MONITORING GRANTS IN THE U S	PART I, LINE 2	SCHEDULE I, PART I, LINE 2 UPO COMPLIES WITH OMB A-110 (2 CFR 215), UNIFORM ADMINISTRATIVE REQUIREMENT FOR GRANTS AND AGREEMENTS WITH INSTITUTIONS OF HIGHER EDUCATION, HOSPITALS AND OTHER NON-PROFIT ORGANIZATIONS AND, OMB A-122 (2 CFR 230), COST PRINCIPLE FOR NON-PROFIT ORGANIZATIONS

Software ID:

Software Version:

EIN: 52-0788987

Name: UNITED PLANNING ORGANIZATION

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
DC PUBLIC SCHOOLS1200 12TH PLACE SE WASHINGTON,DC 20020	53-6001131	170(B)(1)(A)(II)	3,669,953				HEAD START PROGRAM
UNIVERSITY OF THE DISTRICT OF COLUMBIA 1200 12TH PLACE SE WASHINGTON,DC 20020	53-6001131	170(B)(1)(A)(II)	102,922				HEAD START PROGRAM

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BRIGHT BEGINNINGS INC 128 M STREET NW SUITE 300 WASHINGTON, DC 20001	52-1697917	501(C)(3)	610,534				HEAD START PROGRAM
EDWARD C MAZIQUE PARENT CHILD CENTER 1719 13TH STREET NW WASHINGTON, DC 20009	52-0968193	501(C)(3)	1,829,992				HEAD START PROGRAM

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ROSEMOUNT CENTER2000 ROSEMOUNT AVENUE NW WASHINGTON,DC 20010	52-0954828	501(C)(3)	1,214,232				HEAD START PROGRAM
ASSOCIATES FOR RENEWAL IN EDUCATION 45 P ST NW WASHINGTON,DC 20001	52-0914949	501(C)(3)	121,128				HEAD START PROGRAM - SLOTS

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
EAGLE ACADEMY PUBLIC CHARTER SCHOOL770 M STREET SE WASHINGTON,DC 20003	76-0718215	501(C)(3)	381,960				HEAD START PROGRAM - SLOTS
SUNSHINE EARLY LEARNING CENTER4224 6TH STREET SE WASHINGTON,DC 20032	52-1905720	501(C)(3)	215,406				HEAD START PROGRAM - SLOTS



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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CENTER CITY COMMUNITY CORPORATION128 M STREET NW SUITE 300 WASHINGTON,DC 20001	52-0893883	501(C)(3)	353,021				CSBG - COMMUNITY SERVICES, GED
CHANGE INC1413 PARK ROAD NW WASHINGTON,DC 20010	52-6069994	501(C)(3)	297,909				CSBG - COMMUNITY SERVICES, GED

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COUNCIL OF LATINO AGENCY2437 15TH STREET NW 2ND FLOOR WASHINGTON,DC 20009	52-1134568	501(C)(3)	83,146				CSBG COMMUNITY SERVICES
MARSHALL HEIGHTS COMMUNITY DEVELOPMENT ORGANIZATION3939 BENNING ROAD NE WASHINGTON,DC 20019	52-1165147	501(C)(3)	434,732				CSBG - COMMUNITY SERVICES, GED

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
VIDA SENIOR CENTERS 1842 CALVERT STREET NW WASHINGTON,DC 20009	23-7161537	501(C)(3)	89,138				CSBG - COMMUNITY SERVICES
VISITORS' SERVICES CENTER1422 MASSACHUSETTS AVENUE SE WASHINGTON,DC 20003	52-0906685	501(C)(3)	75,175				CSBG - COMMUNITY SERVICES

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
BREAD FOR THE CITY1525 SEVENTH ST NW WASHINGTON,DC 20001	52-1138207	501(C)(3)	51,048				CSBG
LUTHERAN SOCIAL SERVICES4406 GEORGIA AVENUE NW WASHINGTON,DC 20011	53-0207407	501(C)(3)	31,595				CSBG

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COALITION FOR ECONOMIC EMPOWERMENT2413 14TH ST NE 1 WASHINGTON,DC 20018	52-1978454	501(C)(3)	55,815				CSBG - YOUTH LEARNING
SPANISH EDUCATION DEVELOPMENT CENTER 4110 KANSAS AVENUE NW WASHINGTON,DC 20011	23-7147887	501(C)(3)	135,449				HEAD START

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
THE ARRIBA CENTER FOR INDEPENDENT LIVING1010 VERMONT AVENUE NW SUITE 516 WASHINGTON,DC 20005	52-2156088	501(C)(3)	69,989				EMPLOYMENT/JOBS
CENTRAL AMERICAN RESOURCE CENTER1460 COLUMBIA ROAD NW SUITE C-1 WASHINGTON,DC 20009	52-1271888	501(C)(3)	61,709				EMPLOYMENT/JOBS/EDUCATION

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
COVENANT HOUSE OF WASHINGTON2001 MISSISSIPPI AVENUE SE WASHINGTON,DC 20020	13-3537709	501(C)(3)	44,378				EMPLOYMENT/JOB/VOCATIONAL SKILLS
EDGEWOODBROOKLAND FAMILY SUPPORT COLLABORATIVE1345 SARATOGA AVENUE NE UNIT 2 WASHINGTON,DC 20018	52-2246995	501(C)(3)	299,999				CSBG - COMMUNITY SERVICES

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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ANCHOR MENTAL HEALTH - HERMANO PEDRO PROJECT DC (CATHOLIC CHARITIES) 3211 SACRED HEART WAY NW WASHINGTON, DC 20010	52-0824835	501(C)(3)	61,445				EMPLOYMENT/JOBS/HOUSING/HEALTH
SPANISH CATHOLIC CENTER DENTAL CARE EDUCATION AND ACCESS PROGRAM1618 MONROE STREET NW WASHINGTON, DC 20010	52-0980905	501(C)(3)	67,187				HEALTH



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

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
WIDER OPPORTUNITIES FOR WOMEN1001 CONNECTICUT AVENUE NW SUITE 930 WASHINGTON,DC 20036	52-0818450	501(C)(3)	52,259				EMPLOYMENT/JOBS/VOCATIONAL SKILLS TRAINING
MARY'S CENTER FOR MATERNAL & CHILD CARE INC2333 ONTARIO ROAD NW WASHINGTON,DC 20009	52-1594116	501(C)(3)	57,505				FAMILY PROGRAMS/PARENTING CLASS - CSBG

Schedule J  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Compensation Information

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

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization  
UNITED PLANNING ORGANIZATION

Employer identification number  
52-0788987

Part I

Questions Regarding Compensation

		Yes	No
1a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items		
	<div><div><input type="checkbox"/> First-class or charter travel</div><div><input checked="" type="checkbox"/> Housing allowance or residence for personal use</div><div><input type="checkbox"/> Travel for companions</div><div><input type="checkbox"/> Payments for business use of personal residence</div><div><input type="checkbox"/> Tax idemnification and gross-up payments</div><div><input type="checkbox"/> Health or social club dues or initiation fees</div><div><input type="checkbox"/> Discretionary spending account</div><div><input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)</div></div>		
b	If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain	1b	Yes
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	2	No
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		
	<div><div><input type="checkbox"/> Compensation committee</div><div><input checked="" type="checkbox"/> Written employment contract</div><div><input type="checkbox"/> Independent compensation consultant</div><div><input checked="" type="checkbox"/> Compensation survey or study</div><div><input type="checkbox"/> Form 990 of other organizations</div><div><input checked="" type="checkbox"/> Approval by the board or compensation committee</div></div>		
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization		
a	Receive a severance payment or change-of-control payment from the organization or a related organization?	4a	No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	4c	No
	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 only must complete lines 5-9.		
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?	5a	No
b	Any related organization?	5b	No
	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?	6a	No
b	Any related organization?	6b	No
	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	7	No
8	Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III	8	No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	9	

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

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

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

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) DANA M JONES	(i)	138,237	0	30,000	9,253	0	177,490	0
	(ii)	0	0	0	0	0	0	0
( 2 )								
( 3 )								
( 4 )								
( 5 )								
( 6 )								
( 7 )								
( 8 )								
( 9 )								
( 10 )								
( 11 )								
( 12 )								
( 13 )								
( 14 )								
( 15 )								
( 16 )								

**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.

Identifier	Return Reference	Explanation
	PART I, LINE 1A	HOUSING, TRANSPORTATION AND CELL PHONE ALLOWANCE PROVIDED PER EMPLOYMENT CONTRACT APPROVED BY THE BOARD OF DIRECTORS

Schedule K  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
UNITED PLANNING ORGANIZATION

Supplemental Information on Tax Exempt Bonds

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 24a. Provide descriptions, explanations, and any additional information in Schedule O (Form 990).  
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2010

Open to Public  
Inspection

Employer identification number  
52-0788987

Part I Bond Issues

(a) Issuer Name	(b) Issuer EIN	(c) CUSIP #	(d) Date Issued	(e) Issue Price	(f) Description of Purpose	(g) Defeased		(h) On Behalf of Issuer		(i) Pool financing	
						Yes	No	Yes	No	Yes	No
A DISTRICT OF COLUMBIA ENTERPRISE ZONE BOND	53-6001131		09-01-2005	11,500,000	PURCHASE ORGANIZATION'S HEAD QUARTERS AND BUILD TWO NEW COMMUNITY BUILDINGS		X		X		X

Part II Proceeds

		A		B		C		D	
1	Amount of bonds retired	1,710,711							
2	Amount of bonds legally defeased								
3	Total proceeds of issue	11,500,000							
4	Gross proceeds in reserve funds								
5	Capitalized interest from proceeds								
6	Proceeds in refunding escrow								
7	Issuance costs from proceeds	230,000							
8	Credit enhancement from proceeds								
9	Working capital expenditures from proceeds								
10	Capital expenditures from proceeds	11,270,000							
11	Other spent proceeds								
12	Other unspent proceeds								
13	Year of substantial completion	2004							
		Yes	No						
14	Were the bonds issued as part of a current refunding issue?	X							
15	Were the bonds issued as part of an advance refunding issue?		X						
16	Has the final allocation of proceeds been made?	X							
17	Does the organization maintain adequate books and records to support the final allocation of proceeds?	X							

Part III Private Business Use

				A		B		C		D	
				Yes	No	Yes	No	Yes	No	Yes	No
1	Was the organization a partner in a partnership, or a member of an LLC, which owned property financed by tax-exempt bonds?				X						
2	Are there any lease arrangements that may result in private business use of bond-financed property?				X						

Part III

Private Business Use (Continued)

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
3a	Are there any management or service contracts that may result in private business use?		X						
b	Are there any research agreements that may result in private business use of bond-financed property?		X						
c	Does the organization routinely engage bond counsel or other outside counsel to review any management or service contracts or research agreements relating to the financed property?		X						
4	Enter the percentage of financed property used in a private business use by entities other than a section 501(c)(3) organization or a state or local government								
5	Enter the percentage of financed property used in a private business use as a result of unrelated trade or business activity carried on by your organization, another section 501(c)(3) organization, or a state or local government								
6	Total of lines 4 and 5								
7	Has the organization adopted management practices and procedures to ensure the post-issuance compliance of its tax-exempt bond liabilities?	X							

Part IV

Arbitrage

		A		B		C		D	
		Yes	No	Yes	No	Yes	No	Yes	No
1	Has a Form 8038-T, Arbitrage Rebate, Yield Reduction and Penalty in Lieu of Arbitrage Rebate, been filed with respect to the bond issue?		X						
2	Is the bond issue a variable rate issue?	X							
3a	Has the organization or the governmental issuer entered into a hedge with respect to the bond issue?		X						
b	Name of provider								
c	Term of hedge								
d	Was the hedge superintegrated?								
e	Was a hedge terminated?								
4a	Were gross proceeds invested in a GIC?		X						
b	Name of provider								
c	Term of GIC								
d	Was the regulatory safe harbor for establishing the fair market value of the GIC satisfied?								
5	Were any gross proceeds invested beyond an available temporary period?		X						
6	Did the bond issue qualify for an exception to rebate?	X							

Part V

Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule K (see instructions)

Identifier	Return Reference	Explanation

SCHEDULE O

(Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization

UNITED PLANNING ORGANIZATION

Employer identification number

52-0788987

Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 4		THE BY-LAWS WERE REVISED FOR THE FOLLOWING REASONS 1) TO ESTABLISH THE DEVELOPMENT COMMITTEE AS A STANDING COMMITTEE OF THE BOARD 2) TO RENAME THE ORGANIZATIONAL DEVELOPMENT, ASSESSMENT AND OPERATIONS COMMITTEE OF THE BOARD TO THE PROGRAM COMMITTEE 3)TO AMEND STAFF TITLES IN THE REMAINING ARTICLES AS THEY WERE PREVIOUSLY AMENDED IN ARTICLE V OF THE UPO BYLAWS

Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 7A		THE DELEGATE, DISTRICT OF COLUMBIA, U S HOUSE OF REPRESENTATIVES SHALL DESIGNATE ONE (1) REPRESENTATIVE, THE MAYOR OF THE DISTRICT OF COLUMBIA SHALL DESIGNATE FOUR (4) REPRESENTATIVE, AND THE CHAIR OF THE COUNCIL OF THE DISTRICT OF COLUMBIA SHALL DESIGNATE TWO (2) REPRESENTATIVES



Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 11		THE FORM 990 WILL BE REVIEWED BY THE AUDIT & FINANCE COMMITTEE AND WILL BE RECOMMENDED BY THE COMMITTEE FOR APPROVAL BY THE EXECUTIVE COMMITTEE AND THE BOARD OF DIRECTORS ALL BOARD MEMBERS RECEIVE THE FORM 990 BEFORE FILING

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION B, LINE 12C	UPO HAS A CONFLICT OF INTEREST POLICY UPO'S BOARD OF DIRECTORS AND OFFICERS ARE REQUIRED TO FILL OUT A CONFLICT OF INTEREST FORM ANNUALLY EVERY EMPLOYEE IS PROVIDED WITH AN EMPLOYEE HANDBOOK, WHICH HAS THE CONFLICT OF INTEREST POLICY IN IT EVERY EMPLOYEE IS REQUIRED TO SIGN AN ACKNOWLEDGMENT FORM FOR THE RECEIPT OF THE HANDBOOK

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION B, LINE 15	UPO HAS A COMPENSATION COMPARABILITY SCALE TO DETERMINE APPROPRIATE SALARIES. THE SCALE WAS PREPARED USING NATIONAL AND LOCAL DATA FOR NOT-FOR-PROFITS IN COMMUNITY SERVICES. THE BOARD HIRES THE PRESIDENT & CEO, AND APPROVES THE HIRING OF OTHER OFFICERS AND KEY EMPLOYEES INCLUDING COMPENSATION.

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION C, LINE 19	UPO WILL PROVIDE THESE DOCUMENTS ON ITS WEBSITE AND UPON REQUEST

Identifier	Return Reference	Explanation
CHANGES IN NET ASSETS OR FUND BALANCES	FORM 990, PART XI, LINE 5	CAPITALIZATION OF PROGRAM EXPENSES 230,913 TOTAL TO FORM 990, PART XI, LINE 5 230,913

Identifier	Return Reference	Explanation
	FORM 990, PART XI, QUESTION 2C	RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT OF THE FINANCIAL STATEMENTS AND THER PROCESS FOR SELECTION OF THE AUDITORS HAS NOT CHANGED FROM THE PRIOR YEAR

SCHEDULE R  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.  
▶ Attach to Form 990. ▶ See separate instructions.

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization  
UNITED PLANNING ORGANIZATION

Employer identification number  
52-0788987

Part I Identification of Disregarded Entities (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)

(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled organization	
						Yes	No
(1) CHARLES YOUNG COMMUNITY VENTURES  301 RHODE ISLAND AVENUE NW  WASHINGTON, DC 20001 45-1350113	REDEVELOP, IMPLEMENT & MANAGE A MULTI-SERVICE COMMUNITY CENTER	DC	501(C)(3)	LINE 7	UNITED PLANNING ORGANIZATION		No
(2) THE UPO INSPIRE FOUNDATION  301 RHODE ISLAND AVENUE NW  WASHINGTON, DC 20001 90-0634570	FUNDRAISING FOR COLLEGE SCHOLARSHIP PROGRAM FOR LOW INCOME DC RESIDENTS	DC	501(C)(3)	LINE 7	UNITED PLANNING ORGANIZATION		No

Part III

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

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

Part IV

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
(1) UPO CDC 301 RHODE ISLAND AVENUE NW WASHINGTON, DC20001 52-1145355	HOUSING PROGRAMS AND ECONOMIC DEVELOPMENT PROJECTS	DC	UNITED PLANNING ORGANIZATION	C			



Part V

Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, 35A, or 36.)

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

1

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

a

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

b

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

c

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

d

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

e

Loans or loan guarantees by other organization(s)

f

Sale of assets to other organization(s)

g

Purchase of assets from other organization(s)

h

Exchange of assets

i

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

j

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

k

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

l

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

m

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

n

Sharing of paid employees

o

Reimbursement paid to other organization for expenses

p

Reimbursement paid by other organization for expenses

q

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

r

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

Yes

No

1a

1b

1c

1d

1e

1f

1g

1h

1i

1j

1k

1l

1m

1n

1o

1p

1q

1r

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

No

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

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

Schedule R (Form 990) 2010

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

[illegible]

Part VII

Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions)

Identifier	Return Reference	Explanation
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## UNITED PLANNING ORGANIZATION

### BYLAWS

(Adopted as of December 11, 1973; effective as of January 1, 1974)

Amended: 2/10/1976, 9/8/1976, 10/30/1981, 7/15/1982, 9/20/1984, 7/17/1986

(Revised as of 11/20/1986)

Amended: 11/30/1988, 6/23/1994, 1/26/1995, 8/30/2004, 1/27/2005 and  
1/26/2006

Amended 6/14/2007, 3/20/2008, 5/21/2009, 9/17/2009, 11/19/2009

Amended 5/20/2010, 09/16/2010, 01/20/2011, 05/19/2011, **09/15/11**

### ARTICLE I. - NAME

**Section 1.** - The name of the organization shall be the United Planning Organization.

### ARTICLE II. - PURPOSE AND FUNCTION

#### **Section 1.**

The United Planning Organization is the officially designated Community Action Agency for the District of Columbia. Its purpose is to provide leadership, support and advocacy to advance low income and other eligible residents of Washington, D.C., to assist them in achieving self-sufficiency and self-determination, and to enhance generally the quality of life in the local community.

**Section 2.** - This general purposes and functions of UPO are:

- a. Empower individuals, families and communities to move toward self sufficiency and improve the quality of their lives through, economic development, services for the aged, income management, housing, emergency services, employment, education, health and nutrition.

- b. To collect and analyze data on the incidence and nature of poverty; to identify major issues which require community action; and to set priorities and develop corrective measures.
- c. To analyze existing public, private and civic agencies and services as they concern the issues of poverty and improve coordination and methods for fuller mobilization of all resources for support of community action efforts.
- d. In cooperation with the participating agency network, community, business, governmental agencies, and other human service providers, plan and implement human service programs to assist low income and other eligible residents.
- e. To serve as the administrative agency for the utilization and application of governmental and other funds to support UPO's purposes, while assuring responsible fiscal oversight.

### **ARTICLE III. - BOARD OF DIRECTORS**

#### **Section 1. - Board of Directors**

The Board of Directors shall be the governing body of the organization that will manage the business and property of the Corporation consistent with these Bylaws, Certificate of Incorporation and by the requirements of law.

#### **Section 2. - Composition**

- a. General Provisions

The Board of Directors shall consist of not more than twenty-one (21) members and shall be so constituted that (1) one-third of the total members of the Board are elected public officials or their representatives designated by the Delegate, District of Columbia, U.S. House of Representatives; the Mayor of the District of Columbia; and the Chair of the Council of the District of Columbia; (2) one-third of the members are persons chosen in accordance with democratic selection procedures adequate to assure that they are representative of the poor in the area served; and (3) one-third of the members are officials or members of business, law, industry, financial, labor, religious, welfare, education, child welfare and development, or other major groups and interests in the community.

Each member shall be a resident of the District of Columbia. The failure of any member to meet the residential qualifications set forth in this provision shall be cause for removal, and the Board shall remove the member in accordance with the procedures set forth in Article III, Section 4, of these Bylaws.

b. Selection Procedures

The number and composition of the Board of Directors fixed by the Certificate of Incorporation or these Bylaws may be modified by the vote of the majority of the members present and voting except that the number of directors shall in no event be reduced to less than twelve, nor shall the composition or maximum number of the Board of Directors be changed in any manner which would be in violation of any law or regulation governing such composition.

(1) Elected Public Officials or their Representatives

The Delegate, District of Columbia, U.S. House of Representatives shall designate one (1) representative; the Mayor of the District of Columbia shall designate four (4) representatives; and the Chair of the Council of the District of Columbia shall designate two (2) representatives.

(2) Representatives of Low-Income Residents

One-third of the members are persons chosen in accordance with democratic selection procedures established by the Board of Directors to assure that they are representatives of low-income residents in the area served. Representatives of low-income residents shall be chosen in accordance with such procedures and criteria as may be established by the Board of Directors. Such procedures must assure that the representative was democratically selected.

- (a) One representative of low-income residents shall be chosen from the designated election service areas within the District of Columbia as designated by the Board of Directors.

Each member of the Board selected to be a representative of low-income residents shall be a resident of the specific designated election service area at the time of his (her) selection as a representative, and at all times during his (her) term. A representative whose income exceeds 125% of the federal income poverty guidelines issued by the U.S. Department of Health and Human Services must reside in an area with a concentration of poverty greater than the District of Columbia average at the time of his (or her) selection as a representative, and at all times during his (or her) term. The failure of any representative to meet the residential qualifications set forth in this provision shall be cause for removal, and the Board shall remove such representative in accordance with the procedures set forth in Article III, Section 4. – Removal of a Director, of these Bylaws.

- (b) One representative shall be designated by the UPO Policy Council who represents the UPO Policy Council and the neighborhood where the member resides.

(3) Representatives of Major Groups and Interests

One-third of the representatives of major groups and interests in the community shall be chosen as follows:

- (a) The Board of Directors of UPO, sitting as a major group and interest in the community, shall elect the remaining directors from among groups representative of business, law, industry, financial, labor, religious, welfare, education, child welfare and development, or other major group and interests in the community.

### **Section 3. - Terms**

- a. Terms of Board Members - The term of each director shall be three years. Upon completion of a director's term, that director shall continue to serve until a successor is appointed. Except as otherwise provided herein, no member shall serve more than two successive terms. After a hiatus of at least six years from service on the Board, a former director shall be eligible for appointment as a director for not more than two successive three-year terms.
- b. Board Continuity - To ensure the continuity of the Board, directors shall be selected on a staggered basis. Any director who has served on the Board for more than six years shall be rotated off the Board in 2007; and any director who was selected to be a representative of the poor in 2005 with a term of three years shall rotate off the Board in 2008.
- c. Resignation - Any director may resign by giving written notice of such resignation to the Board.

### **Section 4. - Removal of a Director**

Any director may be removed by a majority of the entire number of directors for any cause deemed sufficient by the directors upon a motion duly made by the Nominating, Bylaws and Board Governance Committee. However, before any member may be removed, he shall be notified in writing at least two weeks prior to the next board meeting



of the reason for the proposed action against him, the action contemplated by the Board pursuant to such reasons, and a reasonable opportunity to show cause and be fairly heard by the Board regarding the reasons.

#### **Section 5. - Attendance**

The Nominating, Bylaws and Board Governance Committee of the Board shall, at a regularly scheduled meeting of the Board of Directors, place before the Board a written motion regarding the removal of any member of the Board of Directors who shall have failed to attend three consecutive regularly scheduled meetings of the Board of Directors and notify the Secretary of the Board. Upon submission of said motion by the Nominating, Bylaws and Board Governance Committee, the matter shall be deemed properly before the Board for discussion and vote, including a consideration of the issue of whether cause deemed sufficient by the Board has been shown. The provisions of Section 4 shall apply to any action contemplated under this section.

#### **Section 6. - Vacancies - Board**

In order to fill board vacancies, the Nominating, Bylaws and Board Governance Committee shall submit to the Board the names of persons that the Committee believes are qualified to fill such vacancies, as established by the Board. From the foregoing nominations, the designated members of the Board shall elect new directors to fill existing vacancies, consistent with Article III, Section 2.b. - Selection Procedures. Such election shall be by majority vote of those members present and voting. Within 30 days of notice of a Board vacancy, the Board will initiate the process to have the vacancy filled.

#### **Section 7. - Board Meetings**

- a. Regular meetings of the Board of Directors shall be held during evening hours at such places and times as may be fixed by general resolution of the Board, or at such places or by teleconference and times as shall be specified by the Board.
- b. Special meetings shall be held whenever called by the Chair or by a majority of the

Board, either in writing or by vote. There shall be not less than six regularly scheduled meetings of the Board of Directors annually. These meetings shall take place not less than every other month -- January, March, May, July, September, and November.

- c. The Board shall keep minutes of all of its meetings which shall provide a full account of the business conducted.

#### **Section 8. - Notice of Meetings**

Notice in writing or by electronic interface of the place, day and hour of every regular meeting of the Board shall be given to each director not later than seven days before the day set for the meeting. Notice in writing or by electronic interface of the place, day and hour of special or emergency meetings of the Board shall be given not less than 24 hours before the day set for the meeting.

#### **Section 9. - Quorum**

A majority of the membership of the Board of Directors shall be necessary and sufficient to constitute a quorum for the transaction of business at every meeting of the Board, but if at any meeting there be less than a quorum present, a majority of those present may without notice adjourn the meeting until a quorum shall attend. At any such adjourned meetings at which a quorum shall be present, any business may be transacted which might have been transacted at the meeting as originally notified.

#### **Section 10. - Designation of Board Members**

The Board of Directors may designate from time to time Board Members to boards of other tax-exempt organizations or governmental units or instrumentality. All designations shall be in the best interest of the Corporation and shall protect and further the interest of the Corporation.

### **ARTICLE IV.**

## OFFICERS, EXECUTIVE COMMITTEE AND OTHER COMMITTEES

### Section 1. - Officers of the Corporation

The officers of the Corporation shall be a Chair, a Vice Chair, a Treasurer and a Secretary.

### Section 2. - Duties of Officers

The officers shall have such authority and perform such duties of the Corporation's business as usually pertain to the offices they hold, as may be assigned to them by the Board, or as may be otherwise provided by these Bylaws.

#### a. Duties of the Chair

The Chair of the Board of Directors shall be responsible for the execution of the functions and duties as provided by these Bylaws and for the execution of other powers as may be assigned by the Board. The Chair shall convene and preside at all meetings of the Board of Directors.

#### b. Duties of the Vice Chair

The Vice Chair, in the absence or disability of the Chair, shall perform the duties and exercise the powers of the Chair. The Vice Chair shall generally assist the Chair in performing such other duties, and execute other powers as may be prescribed by the Board of Directors.

#### c. Qualifications and Duties of the Treasurer

- (1) Qualifications - The Treasurer shall have a professional background in financial management and an understanding of accounting for nonprofit organizations.

(2) Duties - The Treasurer shall be responsible for reporting to the Board on all financial matters of the Corporation. The Treasurer's responsibilities shall also include:

- serving as the chairperson of the Audit and Finance Committee;
- conducting, along with the Audit and Finance Committee, the Board's review of and action related to the Board's financial responsibilities;
- working with the President and Chief Executive Officer and the Vice President of Finance and Chief Financial Officer of the Corporation to ensure that appropriate financial reports (including internally prepared monthly financial statements) are made available to the Board on a timely basis;
- communicating the Board's priorities to the President and Chief Executive Officer and/or the Vice President of Finance and Chief Financial Officer with respect to the annual budget and presenting the budget to the Board for approval; and
- reviewing the annual audit.

d. Duties of the Secretary

The Secretary shall be responsible for assuring that minutes of Board meetings are recorded, keeping records of board actions, sending out meeting announcements, distributing copies of minutes and the agenda to each board member, keeping records of board attendance and assuring the corporate records are maintained and shall perform such other duties as may be prescribed by the Board of Directors or the Chair. The Secretary shall confer with the Nominating, Bylaws and Board Governance Committee on matters concerning attendance. The Secretary shall have the authority to

affix the Seal of the Corporation to any instrument requiring it, upon approval of the Board of Directors and, when so affixed, the seal may be attested to by the Secretary's signature.

### **Section 3. - Election of Officers**

The officers shall be elected by the Board every two (2) years beginning in calendar year 1995. Each officer may succeed himself (or herself) in office. Each person elected an officer shall continue in office until the next annual meeting after his (or her) election or until his (or her) successor shall have been duly elected and qualified, or until his (or her) resignation or removal in accordance with these bylaws.

### **Section 4. - Removal of an Officer**

An officer may be removed by a majority vote of the entire Board whenever in its judgment the best interest of the Corporation will be served thereby. Prior to any action being taken under this section, the affected officer shall be notified in writing at least two weeks in advance of the reasons for his (or her) proposed dismissal and given a reasonable opportunity to be fairly heard by the Board regarding the alleged reasons.

### **Section 5. - Vacancies - Officers**

In the event of a vacancy for an officer for cause occurring, a successor to serve the unexpired term may be elected by the Board of Directors in the same manner as his (or her) predecessor at any regular or special meeting of the Board of Directors.

### **Section 6. - Executive Committee**

- a. The Board of Directors shall establish an Executive Committee composed of the officers of the Corporation, the immediate past chair and the chairpersons of all Standing Committees of the Board. The Chair of the Board of Directors shall serve as chairperson of the Executive Committee. Additional members may be appointed by the Chair. The Executive Committee shall hold monthly meetings and, except

for the power to amend the Articles of Incorporation and Bylaws, shall exercise all the powers of the Board between meetings of the Board. All Executive Committee actions, however, shall be reported to the Board at its next meeting and shall stand unless rescinded by the Board. A majority of the Executive Committee's total current membership shall be necessary to constitute a quorum for the transaction of business.

b. Responsibilities:

Subject to ratification by the Board of Directors at its next meeting, the Executive Committee shall:

- (1) Act on behalf of the Board when needed.
- (2) Provide direction to the President and Chief Executive Officer (President/CEO).
- (3) Establish committees as needed to address issues not assigned to a standing committee.
- (4) Develop and represent public positions on behalf of the Board of Directors.
- (5) Receive committee reports, and act as needed.
- (6) Perform an annual evaluation of the President/CEO.
- (7) Based upon Board approval, execute documents necessary to carry out fiduciary responsibilities.
- (8) Coordinate the work of the Board and develop an annual work schedule for the Board.
- (9) Recommend approval of all personnel matters pertaining to the

President/CEO (i.e., salary, leave, benefits, etc.).

## **Section 7. - Standing Committees**

The following Standing Committees are hereby established to assist the Board of Directors in carrying out the purposes of the Corporation. The Chair of the Board of Directors shall appoint the chairperson of each of the Standing Committees. Standing Committees will work in cooperation with each other.

### **a. AUDIT & FINANCE COMMITTEE**

#### **Responsibilities:**

- (1) The Audit & Finance Committee shall review a) the financial statements of the Corporation, b) the independent public accountants qualifications and independence, and c) the performance of the Corporation's internal audit function and independent audits.
- (2) Each member of the Audit & Finance Committee shall be able and understand fundamental financial statements, including the Corporation's balance sheet, revenue and expense statement and cash flow statement, or shall become able to do so within a reasonable period after his (or her) appointment to the Audit & Finance Committee.
- (3) The Audit & Finance Committee shall meet as often as it determines is appropriate, but not less frequently than nine (9) times per year.

The Audit & Finance Committee shall:

- (1) ensure that the Board receives accurate and complete information and make sure that federal and state reporting takes place.
- (2) develop and recommend to the Board an audit policy to govern the Corporation's selection of an independent auditor to conduct the annual financial audit and recommend the selection of the independent auditor.
- (3) meet and review with management and the independent auditor the results of the audit of the Corporation's annual financial statements and any other matters related to the conduct of the audit, which are to be communicated to the Audit & Finance Committee under generally accepted auditing standards. Recommend action on the annual audit to the full Board of Directors.
- (4) provide assistance regarding corporate accounting and reporting practices, including yearly monitoring and evaluation of the quality and integrity of the financial systems and funding mechanisms of the Corporation.
- (5) meet and review with the independent auditor the adequacy and effectiveness of the Corporation's internal accounting and financial controls.
- (6) review findings from completed internal audits and progress reports.
- (7) develop, recommend or implement programs, projects and strategies pertaining to a) the identification and garnering of new resources to expand and reinforce the Corporation's program efforts; b) long-range financial planning techniques designed to enhance the financial security of the Corporation; and c) the establishment of annual funding priorities for Corporation programs.
- (8) recommend to the Executive Committee such modifications to UPO funding plans and resource allocations as are necessary to 1) improve program effectiveness and efficiencies, employee morale, and program economies; and 2) to maximize the impact of UPO's funding upon conditions of poverty



in the metropolitan Washington area.

- (9) conduct or authorize investigations into any matters within the Audit and Finance Committee's scope of responsibilities.
- (10) establish and disclose formal procedures for (a) the receipt, retention, and treatment of complaints received by the Corporation regarding accounting, internal accounting controls or auditing matters; (b) confidential, anonymous submission of concerns regarding questionable accounting or auditing matters; and (c) prevent retaliation.
- (11) review with the Vice President of Legal Affairs and General Counsel any legal and regulatory matters that may have a material impact on the Corporation's financial statements, financial condition or results of operations.
- (12) review and recommend an annual budget for the agency and implement a quarterly process to present recommendation for modifications to the annual budget as needed.

**b. PROGRAM COMMITTEE**

Responsibilities:

- (1) Provide oversight of the Corporation's Community Needs Assessment Process to assure input from customers, partners and the use of appropriate demographic data including coordination with Parent Policy Committee.
- (2) Based upon the results of the Community Needs assessment, recommend for Board approval Priority Focus Areas for service delivery.
- (3) Develop the Corporation's Strategic Plan and make recommendations for Board adoption.

- (4) Perform annual review of Management's Tactical Plan and approved project outcomes.
- (5) Review, quarterly, the progress of the Corporation to reach its project outcomes and report the same to the Board of Directors.
- (6) Review proposed application/executive summaries to assure compliance with approved priority areas and strategic plan and recommend for action by the Board.
- (7) Review of the implementation of funded activities to assure quality controls are in place to meet contractual responsibilities. Make recommendations for revisions or expansion where specific funded activities may benefit.
- (8) Review the monitoring reports of all funding sources to determine the need for Board or Management Action.
- (9) Review and make recommendations on grant applications.
- (10) Ensure that the Board receives information and updates on all planned program reviews and program audits in a timely manner.
- (11) Provide oversight for UPO program operations including coordination with UPO Head Start delegate agencies and Parent Policy Committee.
- (12) Periodically present to the Board the operational strengths and weaknesses of selected program activities, for information and education purposes.

c. **NOMINATING, BYLAWS AND BOARD GOVERNANCE COMMITTEE**

Responsibilities:

- (1) Identify and recommend director nominees to fill expiring and vacant Board

seats and address corporate governance matters. In making such recommendations, consider the knowledge and skills essential to the Board.

- (2) Receive recommendations of interest groups, community groups, board member and individuals for persons to be considered for filling expiring and vacant Board seats.
- (3) Develop and recommend criteria for minimum standards of eligibility for all members of the Board of Directors. Certify: (a) the designation of Mayoral Designees, (b) the democratic election of the Representatives of the Poor, and (c) the election of Representatives of Major Groups and Interests.
- (4) Consider the qualifications of directors and make recommendations for the offices of Chair, Vice Chair, Secretary and Treasurer.
- (5) Conduct orientation sessions for new directors within a reasonable period of time after their appointment or election as a director, and organize ongoing training sessions for the entire Board.
- (6) Consider and make recommendations with respect to the Bylaws and regulations affecting the proper governance of the Board of Directors.
- (7) Periodically review the United Planning Organization Bylaws; and consider, prepare and make recommendations of proposed additions or amendments to these Bylaws consistent with Article VII. – Amendments to the Board of Directors for review and adoption.
- (6) Develop and recommend to the Board the Corporate Governance Guidelines that should be adopted by the Board; and review and reassess, as appropriate, the adequacy of the Corporate Governance Guidelines and recommend any proposed changes to the Board for approval.
- (7) Develop and recommend to the Board a Code of Business Conduct and

Ethics that should be adopted by the Board; and review and reassess, as appropriate, the adequacy of the Code of Business Conduct and Ethics.

- (8) Review and reassess, taking into account the assessment of the relevant committees as to their respective responsibilities, the adequacy of the Board's various committee responsibilities annually and recommend any proposed changes to the Board for approval.
- (9) Monitor and evaluate the Board's performance. Confer with the Secretary of the Board on matters concerning attendance and enforcement of Article III. – Board of Directors Section 5. – Attendance of these Bylaws.
- (10) Conduct exit interviews with outgoing members leaving before terms expires.

**d. HUMAN RESOURCES COMMITTEE**

Responsibilities:

- (1) Monitor, evaluate and make recommendations concerning policies, strategic matters and collaborate on board training related to UPO human resources, personnel and temporary staff issues.
- (2) Periodically review and recommend approval of the personnel policies of UPO that are outside the regular collective bargaining process and consider trends affecting the policies;
- (3) Monitor the collective bargaining process and administration of collective agreement(s) and advise on the improvement of labor-management relations;
- (4) Receive reports for review and/or recommendation for approval of proposals for negotiations with bargaining unit; and agreements or memorandum of agreement or amendments to be presented to the Board;

- (5) Monitor the development and implementation of UPO policies and programs, which affect staff relations including, but not limited to, equal opportunities, workplace diversity, and employee assistance programs;
- (6) Periodically assess the framework governing the salary schedule to determine whether the schedule is in line with UPO's values and relevant regulations, whether there is appropriate internal equity or differences among positions and departments, whether specific positions are appropriately placed on the scale, whether compensation is in line with that at similar organizations and or whether the compensation supports (rather than hinders) UPO's ability to recruit qualified staff; and recommend the salary schedule for Board approval.
- (7) Annually review specific salaries of staff against the salary schedule, to ensure that no individuals are being paid outside the range of that person's position; and to ensure compliance with the salary schedule and to protect against favoritism.
- (8) Review the benefits package – health insurance, long-term disability, 401(k) and so forth – and make recommendations for Board approval with reference to current market trends.
- (9) Review and provide general oversight of workplace health and safety policies and processes that ensure compliance with occupation and environmental health and safety legislation, relevant regulations, standards and codes of practice.
- (10) Receive and present annual health and safety report to the Board with recommendations for improvement as necessary.
- (11) Monitor, review and recommend approval of framework for staff engagement, recruitment, retention, development and training, employee well-being,

appraisal and succession planning.

- (12) Review and recommend procedures for Board approval for executive level staff to present disputes, problems or grievances, especially when such relate to the overall administration and management of the corporation's affairs to the Board.
- (13) Consider only those matters brought to it in accordance with established procedures, and recommend any necessary actions to the Board.
- (14) Consider the future and present workforce needs of UPO and make recommendations concerning directions to take as determined for approval by the Board.
- (15) Receive reports and make recommendations to the Board on established personnel policies and procedures.

**e. DEVELOPMENT COMMITTEE**

Responsibilities:

- (1) Develop, create and recommend to the Board of Directors:
  - strategies and activities designed to support and advance the mission and strategic plan of UPO with special emphasis on fundraising; and
  - publicity and public relations strategies and activities to enhance the recognition and image of UPO, its activities and accomplishments throughout the Washington Metropolitan Area.
- (2) Work with the President and Chief Executive Officer and UPO staff on the planning, policies and conduct of UPO's Martin Luther King, Jr. annual

breakfast; the UPO/Joseph A. Beavers Scholarship and other scholarship programs; and other needs of the organization.

- (3) Recommend nominees for the board of directors of the UPO Inspire Foundation, and make regular reports to the Executive Committee and Board of UPO on Foundation activities.
- (4) Assist in implementing and coordinating the fund-raising activities authorized by the UPO Board of Directors. These acts may include, but are not limited to:
  - a) involving all UPO board members in fundraising activities;
  - b) promoting the development of UPO through various forms of planned giving such as bequests, trusts and gifts of cash or other assets;
  - c) monitoring fund-raising activities in an effort to see that ethical practices are in place and being followed;
  - d) working with board and staff to ensure that donors are acknowledged appropriately and their confidentiality is protected, as requested, and as permissible by law ;
  - e) evaluating the effectiveness of fundraising activities;
  - f) developing partnerships with private and/or public sectors to improve the work, scope, image and success of UPO in accomplishing its mission;
  - g) training Board members on development concepts, ethics and techniques;
  - h) making recommendations for UPO Board approval and working closely with consultants, as necessary, to provide professional

services to assist UPO in successful fundraising activities and community awareness strategies.

- (5) Seek opportunities for pro bono and in kind assistance to support UPO activities and initiatives.
- (6) Report regularly to the Executive Committee of the Board of Directors on the Development Committee's activities and submit any recommendations to the Executive Committee and Board of Directors for approval.
- (7) Meet on a regular basis, as necessary, to accomplish the work of the committee.

The Board of Directors may designate no more than one community representative who is not a member of the Board of Directors to serve on any one Standing Committee. The chairperson of any Standing Committee, however, must be a member of the Board of Directors.

#### **Section 8. - Other Committees**

The Board of Directors may, by resolution, establish such other committees as it may deem necessary and shall define their duties, term, the manner in which they shall operate and other incidents. Such committees may include those that are advisory in nature and may serve to provide greater community involvement in the content area focus of the organization.

### **ARTICLE V. - STAFF**

#### **Section 1. – President and Chief Executive Officer (President/CEO)**

The Board of Directors shall appoint a President and Chief Executive Officer (President/CEO) who shall be immediately responsible to it and shall serve at the pleasure of the Board of Directors. The President/CEO shall, subject to such review and



approval as the Board of Directors may require, be responsible for the administration and supervision of all operational phases of the Corporation.

## **Section 2. – Vice President of Administrative Support and Chief of Staff (VP/COS)**

Subject to the approval of the Board of Directors, the President and Chief Executive Officer (President/CEO) shall hire a Vice President of Administrative Support and Chief of Staff (VP/COS). The VP/COS shall serve as the second in command and shall perform duties as defined in a job description provided by the President/CEO. In the absences of the President/CEO, the VP/COS shall be responsible for the administration and supervision of all operational phases of the Corporation. The VP/COS shall provide direct supervision of administrative support units.

## **Section 3. – Vice President of Legal Affairs and General Counsel**

Subject to the approval of the Board of Directors, the President and Chief Executive Officer (President/CEO) shall hire a Vice President of Legal Affairs and General Counsel (VP/General Counsel). The VP/General Counsel shall serve as the chief legal advisor for the Corporation and legal advisor to the President/CEO. The VP/ General Counsel shall perform duties as defined in a job description provided by the President/CEO.

## **Section 4. – Vice President of Finance and Chief Financial Officer (VP/CFO)**

Subject to the approval of the Board of Directors, the President and Chief Executive Officer (President/CEO) shall hire a Vice President of Finance and Chief Financial Officer (VP/CFO). The VP/CFO shall be recommended for employment by the President/CEO. The VP/CFO shall account for all budgets and fiscal matters for the Corporation and must report to the President/CEO and the Board of Directors monthly on the financial status of the Corporation. Strict adherence shall be followed with regard to the all applicable Office of Budget and Management Circulars for Non-Profit Fiscal Management, Assurances of all

Grants and Contracts to guarantee that the standards of the office are addressed in a manner consistent with Generally Accepted Accounting Principles.

#### **Section 5. - Vice President of Operation and Chief Operations Officer (VP/COO)**

Subject to the approval of the Board of Directors, the President and Chief Executive Officer (President/CEO) shall appoint a Vice President of Operations and Chief Operations Officer (VP/COO). The VP/COO shall be recommended by the President/CEO and charged with the responsibility of oversight of Daily program operations assuring compliance with outcome projections and contractual requirements.

#### **Section 6. - Independent Auditing Firm**

Based upon the recommendation of the Audit and Finance Committee, the Board of Directors shall hire an Independent Auditing Firm to provide for an annual audit of the approved budget of the organization. The firm shall work with management to provide the appropriate oversight and review as required by OMB Circular A-133. The findings and results of the audit must be provided to the full Board of Directors no later than six months after the end of the fiscal year.

### **ARTICLE VI. - SUNDRY PROVISIONS**

#### **Section 1. - Compensation**

No member of the Board of Directors, any board of directors, or any committee or council created by such Board shall receive compensation for his (or her) service as a member. Nothing in this section shall preclude such member from receiving reimbursements for authorized expenses in connection with his (or her) work as a member.

#### **Section 2. - Checks**

All checks, drafts, or order for payment of money, notes or other indebtedness, issued in the name of the Corporation, except payroll checks, shall have two signatures and be signed by at least one of the designated officers of the Board. The President and Chief Executive Officer (President/CEO) and the Vice President of Operations and Chief Operating Officer (VP/COO) may sign with a designated Board officer. Such signers shall be designated by resolution of the Board of Directors. No checks shall be signed in blank. The President/CEO, or in his (or her) absence, the VP/COO, may sign payroll checks.

### **Section 3. - Fiscal Year**

The fiscal year of the Corporation shall extend from October 1 to September 30, unless otherwise provided by the Board of Directors.

### **Section 4. - Seal of the Corporation**

The Seal of the Corporation shall be circular in form, with the name of the Corporation and "District of Columbia" inscribed around the outer edge and in the center the word "incorporation" and the year of incorporation.

### **Section 5. - Rules of Order**

Except insofar as the Bylaws, the Articles of Incorporation and applicable statutes shall otherwise provide, meetings of the Board of Directors and/or committees of the Board shall be conducted, to the extent pertinent, in accordance with Robert's Rules of Order.

### **Section 6. - Conflict of Interest Policy**

All directors shall adhere to the Conflict of Interest Policy adopted September 2003 and as amended.

## **ARTICLE VII. - AMENDMENTS**

These Bylaws, or any part of them, or any additional or amended Bylaws, may be altered or repealed, and new Bylaws may be adopted at any regular or special meeting of the Board of Directors upon thirty (30) days notice in writing to the Board of Directors, the notice of which shall set forth said intention and the terms of the proposed amendment, by the vote of a majority of the members present and voting.