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DLN: 93491321065070

2019

OMB No. 1545-0052

Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

Department of the Treasury Internal Revenue Service

Form 990-PF

Do not enter social security numbers on this form as it may be made public.
 Go to <u>www.irs.gov/Form990PF</u> for instructions and the latest information.

Open to Public Inspection

		ndar year 2019, or tax year beginning 01-01-20)19 , ar	nd en	ding 12-31-			
		Indation MMONS INC				entification numbe	r	
					27-2832137			
		I street (or P.O. box number if mail is not delivered to street address) T 27TH STREET 8TH FL	Room/suite		B Telephone number (see instructions)			
					(347) 455-8122			
		, state or province, country, and ZIP or foreign postal code NY 10001			C If exemption	application is pending	g, check here	
G Cł	neck al	l that apply: \Box Initial return \Box Initial return of a	former public charity		D 1. Foreign org	ganizations, check he	re	
		☐ Final return ☐ Amended return				ganizations meeting k here and attach cor		
		Address change Name change			,	indation status was t	· -	
		pe of organization: $lacksquare$ Section 501(c)(3) exempt private a 4947(a)(1) nonexempt charitable trust \Box Other taxable	foundation e private foundation			n 507(b)(1)(A), chec		
			Cash 🗹 Accru	ıal	F If the founda	tion is in a 60-month	n termination	
of line	year (f e <i>16)</i>	rom Part II, col. (c), ▶\$ 15,688,158 CPart I, column (d) must	be on cash basis.)		under section	n 507(b)(1)(B), checl	k here ► L	
Pa	rt I	Analysis of Revenue and Expenses (The total	(a) Revenue and	Т			(d) Disbursements	
		of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)	expenses per books	(b)	Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)	
	1	Contributions, gifts, grants, etc., received (attach schedule)	5,647,188	3				
	2	Check ► ☐ if the foundation is not required to attach	3,317,100					
	_	Sch. B						
	3	Interest on savings and temporary cash investments Dividends and interest from securities	34,132	2	34,132			
	4 5a	Gross rents		-				
	b	Net rental income or (loss)		+				
e	6a	Net gain or (loss) from sale of assets not on line 10						
Revenue	b	Gross sales price for all assets on line 6a						
Rev	7	Capital gain net income (from Part IV, line 2)		1	0			
	8	Net short-term capital gain				0		
	9	Income modifications						
	10a	Gross sales less returns and allowances						
	b	Less: Cost of goods sold		-				
	C	Other income (attach schedule)	992,403	,	0	992,403		
	11	,						
	12	Total. Add lines 1 through 11	6,673,723 494,426	-	34,132	992,403 7,041	487,385	
	13 14	Other employee salaries and wages	3,010,419	-	0	42,873	2,967,545	
S	15	Pension plans, employee benefits	18,821	_	0	18,821	0	
ıse	16a	Legal fees (attach schedule)		 				
<u>5</u>	ь	Accounting fees (attach schedule)	42,401	1	0	42,401	0	
Ě	c	Other professional fees (attach schedule)	1,678,322	2	0	84,682	1,593,640	
Operating and Administrative Expenses	17	Interest		+				
tra	18	Taxes (attach schedule) (see instructions)	239,063	3	0	239,063	0	
inis	19	Depreciation (attach schedule) and depletion		t				
Ē	20	Occupancy						
Ρ	21	Travel, conferences, and meetings	716,560		0	8,161	708,400	
an	22	Printing and publications						
ing	23	Other expenses (attach schedule)	102,360		0	97,110	5,250	
rat	24	Total operating and administrative expenses.						
<u> </u>		Add lines 13 through 23	6,302,372	-	0	540,152	5,762,220	
_	25	Contributions, gifts, grants paid	0	<u>' </u>			0	
	26	Total expenses and disbursements. Add lines 24 and 25	6,302,372	2	0	540,152	5,762,220	
	27	Subtract line 26 from line 12:		1				
	a	Excess of revenue over expenses and disbursements	371,351	.[
	ь	Net investment income (if negative, enter -0-)			34,132			
	С	Adjusted net income (if negative, enter -0-)				452,251		

Beginning of year

3,775,000

356,106

7,622,470

1,422,732

1,287,365

4,792,860

2,829,610

2,829,610

7,622,470

2,074,688

8,075

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(چە

Page 2

12,214,828

273,949

15,688,158

End of year

3,775,000

7,248,330

1,749,387

1,287,365

4,047,369

3,200,961

3.200.961

7,248,330

2,829,610

3,200,961

3,200,961 Form **990-PF** (2019)

371,351

1

2

3 4

5

6

935.798

74,819

273,949

		Less: allowance for doubtful accounts ▶	675,440	1,279,506	1,279,506
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶		'	
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule)			
		Less: allowance for doubtful accounts ▶		'	
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges	14,179	36,551	36,551
As	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	l c	Investments—corporate bonds (attach schedule)			

Investments—corporate bonds (attach schedule) Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule)

Investments—mortgage loans . . .

Land, buildings, and equipment: basis ▶

Less: accumulated depreciation (attach schedule)

Total assets (to be completed by all filers—see the

Loans from officers, directors, trustees, and other disqualified persons

Mortgages and other notes payable (attach schedule).

Total liabilities(add lines 17 through 22)

Foundations that do not follow FASB ASC 958, check here ▶ □

Foundations that follow FASB ASC 958, check here ▶

Capital stock, trust principal, or current funds

Paid-in or capital surplus, or land, bldg., and equipment fund

Retained earnings, accumulated income, endowment, or other funds

Total net assets or fund balances (see instructions)

Total liabilities and net assets/fund balances (see instructions) .

Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-

Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29

Analysis of Changes in Net Assets or Fund Balances

Investments—other (attach schedule)

instructions. Also, see page 1, item I)

Accounts payable and accrued expenses .

and complete lines 24, 25, 29 and 30.

Net assets without donor restrictions .

and complete lines 26 through 30.

of-year figure reported on prior year's return)

Other increases not included in line 2 (itemize)

Enter amount from Part I, line 27a

Add lines 1, 2, and 3 Decreases not included in line 2 (itemize)

Net assets with donor restrictions .

Other assets (describe

Other liabilities (describe ▶_

Grants payable

Attached schedules and amounts in the description column

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Part II

11

12

13 14

15

16

17

18

19

20 21

22

23

24

25

28

30

Part III

Liabilities

Fund Balances

ŏ 26

Assets 27

Net 29

2

Page **3**

(a) List and descrit 2-story brick w	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)		
1a					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	Cost or	(g) other basis ense of sale	Gain o	h) r (loss)) minus (g)
а					
b					
С					
d					
e					
Complete only for asset	s showing gain in column (h) and ow	ned by the foundation	on 12/31/69		1)
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	Excess	(k) of col. (i) l. (j), if any	col. (k), but not	h) gain minus less than -0-) or om col.(h))
a					
b					
c					
d					
e					
·	gain or (loss) as defined in sections art I, line 8, column (c) (see instructi	ons). If (loss), enter -0	,	3	
Part V Qualification	Under Section 4940(e) for Re	educed Tay on Net	Investment Ir	come	
	private foundations subject to the se				
if section 4940(d)(2) applies, l Was the foundation liable for tl	eave this part blank. he section 4942 tax on the distributa	ble amount of any year	in the base period	_	es 🗹 No
,	ot qualify under section 4940(e). Do mount in each column for each year;			25	
(a)			making any entri	(d)	
Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitab		Distribution rat (col. (b) divided by c	ol. (c))
2018 2017	16,126,029 6,694,736		952,455 1,626,238		16.931014 4.116701
2017	5,790,218		1,656,582		3.495280
2015	7,144,139		3,166,588		2.256100
2014	6,683,140		3,599,837		1.856512
2 Total of line 1, column (2		28.655607
3 Average distribution rati	o for the 5-year base period—divide	,	.0, or by the 3		5.731121
	ndation has been in existence if less oncharitable-use assets for 2019 fron			1	5,597,251
5 Multiply line 4 by line 3		•	5		32,078,523
. , ,	ent income (1% of Part I, line 27b)		6		341
					32,078,864
	tions from Part XII, line 4 ,				17,977,048
If line 8 is equal to or gr instructions.	reater than line 7, check the box in Pa	art VI, line 1b, and com	nplete that part usi	ng a 1% tax rate. Se	

orm	990-PF (2019)						Page 6
Pa	rt VIII-B Statements Regardi	ng Activities for Which	Form 4720 May Be	Required (continued)			
5a	During the year did the foundation pa	y or incur any amount to:				Yes	No
	(1) Carry on propaganda, or otherwis	se attempt to influence legisl	ation (section 4945(e))?	☐ Yes ✓	No		
	(2) Influence the outcome of any spe	ecific public election (see sec	tion 4955); or to carry				
	on, directly or indirectly, any vote	er registration drive?		· · 🗌 Yes 🗸	No		
	(3) Provide a grant to an individual for	or travel, study, or other sim	ilar purposes?	Yes V	No		
	(4) Provide a grant to an organization	n other than a charitable, etc	c., organization described				
	in section 4945(d)(4)(A)? See ins			· · • • Yes □	No		
	(5) Provide for any purpose other that	an religious, charitable, scien	tific, literary, or				
	educational purposes, or for the p	•		∟ Yes 🖭	No		
b	If any answer is "Yes" to $5a(1)-(5)$, or	•		•			
	Regulations section 53.4945 or in a c	, , , , , , , , , , , , , , , , , , ,		_	5b	Yes	
	Organizations relying on a current no						
С	If the answer is "Yes" to question 5a(• •	•				
	tax because it maintained expenditur	· · · · · · · · · · · · · · · · · · ·		· · • Yes 🗌	No		
	If "Yes," attach the statement require		—				
6a	Did the foundation, during the year, r	, , , ,					
	a personal benefit contract?			∟ Yes ⊻	No .		l <u>.</u> .
b	Did the foundation, during the year, p	pay premiums, directly or inc	lirectly, on a personal be	nefit contract?	6b	-	No
_	If "Yes" to 6b, file Form 8870.						
	At any time during the tax year, was			∟ Yes 💌	No		
	If "Yes", did the foundation receive a				7b		
8	Is the foundation subject to the section						
	excess parachute payment during the			· · L Yes 🗹			<u> </u>
Pa		fficers, Directors, Trust	tees, Foundation Ma	nagers, Highly Paid Er	nployees	,	
	and Contractors						
1	List all officers, directors, trustees	•	•		1		
	(a) Name and address	(b) Title, and average hours per week	(c) Compensation (If not paid, enter	(d) Contributions to employee benefit plans and	(e) Expe		
	(a) Hame and dadress	devoted to position	-0-)	deferred compensation	other a	allowan	ces
See .	Additional Data Table						
2	Compensation of five highest-paid	l employees (other than t	hose included on line	l—see instructions). If no	ne, enter '	'NONE	."
		(b) Title, and average		(d) Contributions to			
(a)	Name and address of each employee p more than \$50,000	hours per week	(c) Compensation	employee benefit plans and deferred	(e) Expense account, other allowances		
	more than \$50,000	devoted to position		compensation			
)AR	A MENASHI	MANAGING DIRECTOR	236,25	50 5,486			0
.04	W 27TH STREET	40.00					
1EM	YORK, NY 10001						
DEN]	ISE GOODMAN	STRATEGY LEAD	205,00	5,274			0
	W 27TH STREET	36.00					
	YORK, NY 10001						
STAC	CEY GERBER	ENGAGEMENT MANAGER	199,50	6,382			0
	W 27TH STREET	37.00					
	YORK, NY 10001	CTD A CECY EAD	405.00	20 5 000			
	RIDEOUT	STRAGEGY LEAD 36.00	185,00	5,820			0
	W 27TH STREET YORK, NY 10001	30.00					
		IMDI EMENITATION	170.15	2 5 175			
	Y MCCAULEY	IMPLEMENTATION SUPPO	179,11	5,175			U
	W 27TH STREET YORK, NY 10001	36.00					
	I number of other employees paid over	- \$50.000 .					21
	Simple for paid over	1/	<u> </u>		Form QQ	n-PF	

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Part VIII Information About Officers, Directors, Trus and Contractors (continued)	stees, Foundation Managers, Highly Paid E	Employees,
3 Five highest-paid independent contractors for professional	services (see instructions). If none, enter "NO	NE".
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MARTIN ZANGHI	TECHNICAL ASSISTANCE	103,959
76 EVERETT AVE SOUTH PORTLAND, ME 04106		
MICHAEL SANDERS ENTERPRISES	TECHNICAL ASSISTANCE	99,750
1275 MACKINTOSH PARK ATLANTA, GA 30318		
VICKY KELLY	TECHNICAL ASSISTANCE	99,731
27538 S NICKLAUS AVE MILLSBORO, DE 19966		
JUSTSOLVE INC	TECHNICAL ASSISTANCE	97,200
202 S BRANCIFORTE AVE SANTA CRUZ, CA 95062		
MACALUSO & ASSOCIATES LLC	TECHNICAL ASSISTANCE	79,980
52 LAKEVIEW DRIVE ALLENTOWN, NJ 08501		
Total number of others receiving over \$50,000 for professional service	s	12
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Incorganizations and other beneficiaries served, conferences convened, research paper		Expenses
JUSTICE, MENTAL HEALTH THROUGH PUBLIC AND PRIVATE HUMAI DISSEMINATE BEST PRACTICE TOOLS THAT EMPHASIZE THE USE PREDICTIVE ANALYTICS, RACE AND EQUITY, RESEARCH AND DEVI DEVELOPMENT EXPERTISE THROUGH A CADRE OF SEASONED PUB EXTENSIVE PRACTICAL MANAGEMENT AND LEADERSHIP EXPERIEN 2	5,762,006	
3		
4		
Part IX-B Summary of Program-Related Investments	s (see instructions)	
Describe the two largest program-related investments made by the foundation	during the tax year on lines 1 and 2.	Amount
1		-
2		
All other program-related investments. See instructions.		12,214,828
Total. Add lines 1 through 3		12,211,020
		Form 990-PF (2019)

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

Page 8

279.863

5,762,220

12,214,828

17,977,048

17,977,048

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2c

3

4

5

6

7

1a

1b

2

За 3h

4

5

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Minimum investment return. Enter 5% of line 5.

Add lines 2a and 2b.

organizations check here

and do not complete this part.)

Tax on investment income for 2019 from Part VI, line 5.

Distributable amount before adjustments. Subtract line 2c from line 1. . . .

Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.

Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

income. Enter 1% of Part I, line 27b. See instructions.

Adjusted qualifying distributions. Subtract line 5 from line 4.

Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . .

Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

Income tax for 2019. (This does not include the tax from Part VI.). . .

Recoveries of amounts treated as qualifying distributions.

Qualifying Distributions (see instructions)

Amounts set aside for specific charitable projects that satisfy the:

the section 4940(e) reduction of tax in those years.

Part X

Part XI

1

2a

3

4

5

6

1

2

3

4 5

Part XII

D	Average of monthly cash balances.	TD	3,000,932
C	Fair market value of all other assets (see instructions)	1 c	615,536
d	Total (add lines 1a, b, and c)	1d	5,682,488
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets.	2	C

d	Total (add lines 1a, b, and c)	1d	5,682,488
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	5,682,488
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see		

	1c (attach detailed explanation)	<u> </u>	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	5,682,488
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see		
	instructions)	4	85,237
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,597,251

Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

2a

2b

Part XIIII Undistributed Income (see instru	ctions)			
	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only				<u> </u>
b Total for prior years: 20, 20, 20				
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e				
4 Qualifying distributions for 2019 from Part				
XII, line 4: • \$				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2019 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019.				
(If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount —see instructions				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must				

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	same amount must be shown in column (a).)		
6	Enter the net total of each column as indicated below:		
а	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		
b	Prior years' undistributed income. Subtract line 4b from line 2b		
С	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		
d	Subtract line 6c from line 6b. Taxable amount —see instructions		
е	Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions		

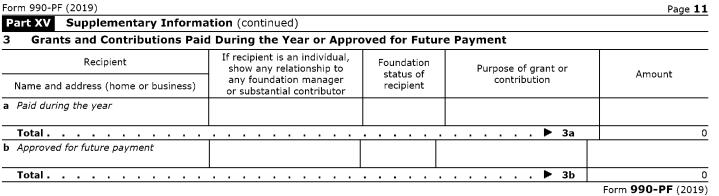
be distributed in 2020 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2014 not applied on line 5 or line $\hat{7}$ (see instructions). . .

9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a . . .

10 Analysis of line 9: a Excess from 2015. **b** Excess from 2016. . c Excess from 2017. . d Excess from 2018. . e Excess from 2019. .

1 Information	Regarding	Foundation	Managers:
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- **b** The form in which applications should be submitted and information and materials they should include:
- c Any submission deadlines:
- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:



_		PF (2019)					Page 12
P	art XVI	I-A Analysis of Income-Producing	Activities				T
Ent	er gross	amounts unless otherwise indicated.	Unrelated b	usiness income (b)	Excluded by section	on 512, 513, or 514	(e) Related or exempt function income
1	Program	n service revenue:	Business code	Amount	Exclusion code	Amount	(See instructions.)
		VICE REVENUE					992,403
	f						
	g Fees	and contracts from government agencies					
		rship dues and assessments t on savings and temporary cash					
3	investr				14	34,132	
4	Divider	nds and interest from securities				0.1,102	
5	Net ren	ital income or (loss) from real estate:					
		financed property					
		ebt-financed property					
		Ital income or (loss) from personal property nvestment income					
		(loss) from sales of assets other than					
•	invento	• •					
9	Net inc	ome or (loss) from special events:					
		profit or (loss) from sales of inventory					
11	Other r	revenue: a					
	d						
12		al. Add columns (b), (d), and (e).)	24.422	002.403
		Add line 12, columns (b), (d), and (e)			•	34,132 L 3	·
		orksheet in line 13 instructions to verify calcu					
Pa	art XVI	I-B Relationship of Activities to the	e Accomplis	hment of Exem	pt Purposes		
Li	ne No. ▼	Explain below how each activity for which the accomplishment of the foundation's exinstructions.)					
1		CASE COMMONS IS A NONPROFIT DEDICTA' THOUGHT LEADERSHIP ON BEHALF OF PUBL JUVENILE JUSTICE, OLDER YOUTH, MENTAL CHARITABLE ACTIVITIES: PROVIDE TECHNI THROUGH PUBLIC AND PRIVATE HUMAN SEI THE USE OF DATA, CONTINUOUS QUALITY I DEVELOPMENT. PROVIDE ORGANIZATIONAL SECTOR PROFESSIONALS WITH EXTENSIVE	LIC AND PRIVAT HEALTH) ACRO CAL ASSITANCE RVICES AGENCI MPROVEMENT, DEVELOPMENT	E AGENCIES FOCU: SS THE COUNTRY \ FOR CHILD WELFA ES. DEVELOP AND PREDICTIVE ANALY EXPERTISE THROU	SED ON REFORMING WITH AN EMPHASIS ARE, OLDER YOUTH, DISSEMINATE BES TICS, RACE AND EG JGH A CADRE OF SE	G HUMAN SERVICES ON DATA AND TEC JUVENILE JUSTICE PRACTICE TOOLS QUITY, RESEARCH A EASONED PUBLIC A	G (CHILD WELFARE, CHNOLOGY. DIRECT MENTAL HEALTH THAT EMPHASIZE
							_
-							
_							

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Part XVII Information Regarding Transfers To and Transactions and Relationships With Nonchari Exempt Organizations	table		
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(A) Reimburgement arrangements	15/4)		No

(5) LOA	ns or loan guarantees.					[10(3)]	140
(6) Perf	ormance of services or m	nembership or fund	raising solicitations			1b(6)	No
c Sharing	of facilities, equipment, i	mailing lists, other	assets, or paid employees.			1c	No
of the go	oods, other assets, or ser	vices given by the	reporting foundation. If the	e foundatior	should always show the fair market n received less than fair market va ther assets, or services received.		·
(a) Line No.	(b) Amount involved	(c) Name of nonch	aritable exempt organization	(d) Desc	cription of transfers, transactions, and sl	naring arrangem	ents
-							
	,	•	, or related to, one or more		· -		
describe	d in section 501(c) (othe	r than section 501	(c)(3)) or in section 527? .		□Yes	✓ No	
b If "Yes,"	complete the following s						
	(a) Name of organizati	on	(b) Type of organizat	ion	(c) Description of rela	itionship	

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 taxpayer) is based on all information of which preparer has any knowledge. Sign May the IRS discuss this 2020-11-16 return Here

Paid Preparer

with the preparer shown Signature of officer or trustee Title Date (see instr.) 🗹 Yes 🗆 No PTIN Print/Type preparer's name Preparer's Signature Date Check if self-P01597612 employed ▶ 🔲 DIANA MILLER

Firm's name ▶ WISS & COMPANY LLP **Use Only** Firm's address ▶ 100 CAMPUS DRIVE

FLORHAM PARK, NJ 07932

Phone no. (973) 994-9400

Firm's EIN ▶22-1732349

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation (a) Name and address Title, and average (c) Compensation (If (d) Expense account, hours per week not paid, enter Contributions to (e) other allowances (b) devoted to position -0-) employee benefit plans

			and deferred compensation	
PATRICK MC CARTHY	CHAIR OF THE BOARD	0	0	C
701 ST PAUL STREET BALTIMORE, MD 212012311	FROM 5/2020 4.00			

			compensation	
PATRICK MC CARTHY	CHAIR OF THE BOARD	0	0	
701 ST PAUL STREET BALTIMORE, MD 212012311	FROM 5/2020 4.00			

PATRICK MC CARTHY	CHAIR OF THE BOARD FROM 5/2020 4.00	0	0	0
701 ST PAUL STREET BALTIMORE, MD 212012311				
DOUGLAS NELSON	TREASURER/BOARD	0	0	0
	1 MEMBER			1

DOUGLAS NELSON	TREASURER/BOARD	0	0	0
104 W 27TH STREET 8TH FLOOR NEW YORK, NY 10001	MEMBER 4.00			
TERESA MARKOWITZ	PRESIDENT/CEO	0	0	0

04 W 27TH STREET 8TH FLOOR EW YORK, NY 10001	4.00			
ERESA MARKOWITZ	PRESIDENT/CEO 40.00	0	0	0
04 W 27TH STREET IEW YORK, NY 10001				
ONY CIPOLLONE	SECRETARY	0	0	0
	14 00 I			

JUCTIN MILLINED	DOADD MEMBER			•
JOHN T GORMAN ONE CANAL PLAZA SUITE 800 PORTLAND, ME 04101	14.00			
TONY CIPOLLONE	SECRETARY	0	0	0
NEW YORK, NY 10001				

JOHN T GORMAN ONE CANAL PLAZA SUITE 800 PORTLAND, ME 04101	14.00			
JUSTIN MILLNER	BOARD MEMBER	0	0	0

800 PORTLAND, ME 04101				
JUSTIN MILLNER	BOARD MEMBER	0	0	0
104 W 27TH STREET STH FLOOR	4.00			

JUSTIN MILLNER	BOARD MEMBER	0	0	0
104 W 27TH STREET 8TH FLOOR NEW YORK, NY 10001	1 4.00			

CHAIR TO 5/2020

4.00

JOHN KIM

701 ST PAUL STREET BALTIMORE, MD 212012311

efile GRAPHIC print - DO NOT P	ROCESS As Filed D	ata -	DI	N: 93491321065070	
TY 2019 Accounting Fe	es Schedule				
Name: CASE COMMONS INC EIN: 27-2832137					
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes	
AUDIT/TAX FEES	42,401	0	42,401	0	

efile GRAPHIC print - DO NOT PROCESS As Filed Data -DLN: 93491321065070 TY 2019 All Other Program Related Investments Schedule Name: CASE COMMONS INC **EIN:** 27-2832137 Category Amount

CASEBOOK IS A PROVEN SAAS HUMAN SERVICES PLATFORM. OUR TECHNOLOGY SOLUTIONS ARE THE RESPONSE TO FRUSTRATION AMONG HUMAN SERVICES

12,214,828 PROFESSIONALS AND LEADERS WHO HAVE STRUGGLED WITH ANTIQUATED INFORMATION

SYSTEMS

Note: To capture the full content of this document, please select landscape mode (11" \times 8.5") when printing.

TY 2019 Expenditure Responsibility Statement

Name: CASE COMMONS INC

EIN: 27-2832137

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
CASEBOOK PBC	104 WEST 27TH STREET 8TH FL NEW YORK , NY 10001	2018-06-29	12,210,000	CASEBOOK HAS USED THE CONTRIBUTION EXCLUSIVELY FOR CHARITABLE PURPOSES, INCLUDING TO DEVELOP, DISTRIBUTE, AND SUPPORT THE INNOVATIVE SOFTWARE THAT CASE COMMONS CREATED AND DEVELOPED, WHICH IS A FAMILY INFORMATION SOFTWARE SYSTEM (THE "SOFTWARE"); IN PARTICULAR, PROVIDING ACCESS TO THE SOFTWARE, AS WELL AS OPTIONAL DATA HOSTING, CONSULTING, AND SOFTWARE SUPPORT AND TRAINING SERVICES, TO PROVIDERS OF SOCIAL SERVICES SUCH AS GOVERNMENTAL CHILD WELFARE AGENCIES, FOSTER CARE PROVIDERS, AND COMMUNITY-BASED CASE MANAGEMENT ORGANIZATIONS (THE "CHARITABLE ACTIVITIES") IN A MANNER CONSISTENT WITH BOTH: (A) CASE COMMONS' PRIMARY MISSION OF PROVIDING TECHNICAL ASSISTANCE, EDUCATION, TRAINING, RESEARCH, AND THOUGHT LEADERSHIP ON BEHALF OF PUBLIC AND PRIVATE AGENCIES FOCUSED ON REFORMING HUMAN SERVICES ACROSS THE COUNTRY WITH A PARTICULAR EMPHASIS ON DATA AND TECHNOLOGY; AND (B) CASEBOOK'S STATUS AS A FUNCTIONALLY RELATED BUSINESS, AS DESCRIBED IN THE INTERNAL REVENUE CODE OF 1986.	12,210,000	NONE	11/16/2020	2020-11-16	CASEBOOK HAS EXPENDED ALL CONTRIBUTION AMOUNTS EXCLUSIVELY FOR CHARITABLE AND EDUCATIONAL PURPOSES TO CARRY OUT THE PROJECT IN A MANNER CONSISTENT WITH THE CHARITABLE MISSION AND THE PUBLIC BENEFIT PURPOSE (CONSISTENT THEREWITH) (AS SUCH TERMS ARE DEFINED IN SECTION 5(A) OF EACH OF THE CONTRIBUTION AGREEMENTS). CASEBOOK IS NOT AWARE OF ANY MIS-USE OR DIVERSION OF THE CONTRIBUTION OR ANY PORTION THEREOF. CASEBOOK IS IN COMPLIANCE WITH ALL APPLICABLE LAW AND, IN PARTICULAR, EACH OF THE CONTRIBUTION AGREEMENTS AND THE LICENSE (AS DEFINED IN THE SECOND CONTRIBUTION AGREEMENT).

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491321065070				
TY 2019 Investments - Other Schedule						
Name: (CASE COMMONS	INC				

12,214,828

3,775,000

EIN: 27-2832137					
Investments Other Schedule 2					
Category/ Item	Listed at Cost or	Book Value	End of Year Fair		
	FMV		Market Value		

AT COST

INVESTMENT IN SUBSIDIARY

Name: CASE COMMONS INC

SECURITY DEPOSIT

DUE FROM CASEBOOK PBC

Other Assets Schedule				
	Description	Beginning of Year - Book Value	End of	

EIN: 27-2832137

f Year - Book

273,949

End of Year - Fair

273,949

Value

356,106

Market Value

			i .			
Other Expenses Schedule						
	EIN: 27-2832137					
	Name:	CASE COMMON	S INC			
TY 2019 Other Expenses Schedule						
		As Filed Data -		DLN	: 93491321065070	

other Expenses Schedule					
Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes	
ADVERTISING AND MARKETING	18,491	0	18,491	0	

19,836

32,224

31,809

19,836

32,224

26,559

5,250

PAYROLL PROCESSING FEES

INSURANCE

OFFICE EXPENSE

Description

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

EIN: 27-2832137

Other Income Schedule

SERVICE REVENUE

Revenue And

992,403

Expenses Per Books

Net Investment

DLN: 93491321065070

Adjusted Net Income

992,403

Income

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		D	LN: 93491321065070
TY 2019 Other Liabilities Sche	dule			
Name:	CASE COMMO	NS INC		
EIN:	27-2832137			
Description	n		Beginning of Year - Book Value	End of Year - Book Value
INTERCOMPANY PAYABLE			2,074,796	935,798
OTHER LIABILITITES			-108	0

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 934913210650							
TY 2019 Other Professional Fees Schedule							
Name: EIN:							
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes			
CONTRACTORS	888,431	0	84,682	803,749			

789,891

789,891

VENDORS

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 9349132106				N: 93491321065070			
TY 2019 Taxes Schedule							
Name: CASE COMMONS INC							
EIN: 27-2832137							
 				1			
Category	Amount	Net Investment	Adjusted Net	Disbursements			
		Income	Income	for Charitable Purposes			

239,063

239,063

PAYROLL TAXES

efile GRAPHIC print - DO	NOT PROCESS As Filed Data	-		DLN: 93491321065070	
Schedule B	Sche	Schedule of Contributors OMB No. 1545-0047			
(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service		to Form 990, 990-EZ, or 990-PF. .gov/Form990 for the latest infor	nation.	2019	
Name of the organization CASE COMMONS INC			Employer i	dentification number	
Organization type (chec	k one):		27-2832137	,	
organization type (enec	. G. 10 / 1				
Filers of:	Section:				
Form 990 or 990-EZ	501(c)() (enter number) organization			
	☐ 4947(a)(1) nonexempt ch	naritable trust not treated as a p	private foundation		
	☐ 527 political organization				
Form 990-PF	☑ 501(c)(3) exempt private	foundation			
	4947(a)(1) nonexempt charitable trust treated as a private foundation				
	☐ 501(c)(3) taxable private foundation				
	ion filing Form 990, 990-EZ, or 990 property) from any one contributor.				
Special Rules					
under sections 50 received from any	on described in section 501(c)(3) fil 9(a)(1) and 170(b)(1)(A)(vi), that c one contributor, during the year, t 1h, or (ii) Form 990-EZ, line 1. Co	hecked Schedule A (Form 990 otal contributions of the greater	or 990-EZ), Part II, line 13	, 16a, or 16b, and that	
during the year, to	on described in section $501(c)(7)$, (tall contributions of more than $$1,0$ we prevention of cruelty to children	000 <i>exclusively</i> for religious, cha	aritable, scientific, literary,		
during the year, could be during the year.	on described in section 501(c)(7), (contributions exclusively for religious ked, enter here the total contribution mplete any of the parts unless the le, etc., contributions totaling \$5,00	s, charitable, etc., purposes, buns that were received during the General Rule applies to this or	it no such contributions tot e year for an <i>exclusively</i> r ganization because it rece	aled more than \$1,000. eligious, charitable, etc., eived <i>nonexclusively</i>	
990-EZ, or 990-PF), but it	that isn't covered by the General I must answer "No" on Part IV, line rt I, line 2, to certify that it doesn't r	e 2, of its Form 990; or check th	e box on line H of its Form	•	
For Paperwork Reduction Ac	t Notice, see the Instructions	Cat. No. 30613X	Schedule B (Form 99	0, 990-EZ, or 990-PF) (2019)	

for Form 990, 990-EZ, or 990-PF.

Schedule	B (Form 990, 990-EZ, or 990-PF) (2019)		Page 4				
	rganization IMONS INC		Employer identification number				
CASE COM	INONS INC		27-2832137				
Part III	than \$1,000 for the year from any one contributo	r. Complete columns (a) of exclusively religious, octions.) ▶ \$	scribed in section 501(c)(7), (8), or (10) that total more) through (e) and the following line entry. For charitable, etc., contributions of \$1,000 or less for				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
	Transferee's name, address, and ZIP 4	(e) Transfer of gift	t Relationship of transferor to transferee				
	-						
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
(a) No. from Part I	Transferee's name, address, and ZIP 4 (b) Purpose of gift	(e) Transfer of gift (c) Use of gift	Relationship of transferor to transferee (d) Description of how gift is held				
1 4111							
	(e) Transfer of gift						
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held				
	Transferee's name, address, and ZIP 4	(e) Transfer of gift	t Relationship of transferor to transferee				
		_	Schedule B (Form 990, 990-EZ, or 990-PF) (2019)				